

Strategic Planning for Training

Statement of Work

Background

The Division of Chemistry (CHE) at the National Science Foundation (NSF) is emphasizing a new Chemical Bonding Centers (CBC) program (Centers). Centers enable higher risk, transformational research on “grand challenge” topics by creating a risk-tolerant and collaborative research environment; pooling scientific infrastructure and leveraging industry outreach and public communication efforts. These Centers are multi-disciplinary while retaining a focus on molecular sciences. They are also virtual centers, not restricted to one physical location, but taking advantage of cyber-enabled technologies to connect the researchers and their data. The Centers are a staged competition, supporting several Phase I Centers (\$0.5M/yr), which then compete for Phase II awards (\$3-5M/yr).

2008 solicitations for Phase I and Phase II are available online

http://www.nsf.gov/funding/pgm_summ.jsp?pims_id=502106&org=CHE

CHE has a need to provide a two-day training conference the week of July 14 – 18, 2008, for small teams from the two Phase I Centers awardees. This will provide them with the basic strategic planning skills and coaching to best position them to succeed in the Phase II competition.

Participants

Five members of the leadership teams of each Phase I Center (10 total) will participate in this two-day training conference and represent the leadership teams of the two Phase I Centers. There will be five attendees from each of the two awardees:

The Origins Project (Georgia Institute of Technology)

http://www.nsf.gov/funding/pgm_summ.jsp?pims_id=6676&org=CHE,

Fueling the Future (University of Massachusetts – Amherst)

<http://www.nsf.gov/awardsearch/showAward.do?AwardNumber=0739227>

The participants will be highly motivated, accomplished academic researchers who may be inexperienced with the Centers mode of research, strategic planning and other collaborative skills. The contractor shall possess the ability to guide these motivated participants into successful collaborative teams.

Tasks:

- 1) Customized Training: Contractor shall coordinate with the Contract Officer's Technical Representative (COTR) and develop a customized curriculum and instructor-led training in strategic planning, leadership and team development.
- 2) Contractor shall provide Executive Coaching for two small teams.
- 3) The contractor shall submit a brief report (not to exceed eight pages) not-later-than fourteen calendar days after the close of the conference. The report shall describe the outcomes of the conference with an emphasis on the processes of the conference (not reports on individual or team contributions or growth). The report shall be readable by MSWord 2003 and submitted to the COTR electronically.

Scheduling and Location

The training conference shall cover two days during the week of July 14-18, 2008. Exact dates shall be coordinated with the participants and COTR. The training shall run from 8:30 am to 4:30 pm on Day One and from 8:30 am to 4:00 pm on Day Two.

The contractor shall be available for additional group/individual coaching up to 9 p.m. on day one by appointment if requested. This extra coaching, if required, shall be invoiced at the negotiated hourly rate.

The training conference will be held at the NSF facility at 4201 Wilson Blvd, Arlington, VA 22230. The NSF will provide a plenary conference room (with overhead and computer projection) and two breakout rooms. NSF staff (1-3 individuals) may observe and/or serve as resource personnel.

Travel

The contractor shall be reimbursed for travel in accordance with FAR 31.205-46 Travel Costs (Federal Acquisition Regulation). A copy of the regulation is accessible at <http://www.arnet.gov/far/>.

The contractor has no obligations concerning the participants' travel under this contract.

Personnel and Qualifications

The contractor shall provide experts who shall lead instructor training and coach during the plenary and breakout sessions. An individual with appropriate expertise may perform more than one of the roles. The contractor shall coordinate with the COTR to refine the tentative agenda presented below.

Instructor(s) shall:

- 1) Have expertise in Strategic Planning, Leadership and Team Development
- 2) Expertise managing small training sessions
- 3) Contractors with experience working with academic researchers and research centers is a plus.

Two coaches are required to work with each small team. Each coach shall

- 1) Be certified in Executive Coaching
- 2) Have experience with small group coaching

Key Personnel

The personnel listed below are considered essential to the work being performed under this contract. Under the terms of this contract, no key personnel substitutions shall be permitted unless an individual's sudden illness, death, or termination of employment necessitates such substitutions. In any of these events, the contractor shall promptly notify the Contracting Officer and provide the information outlined below in sufficient detail to indicate that the proposed substitution(s) meets or exceeds the qualifications of the person(s) being replaced. Before removing, replacing, or diverting any of the listed or specified personnel, the contractor shall:

- Notify the Contracting Officer reasonably in advance (no less than 30 calendar days);
- Submit a detailed explanation or justification for the proposed substitution; and
- Furnish a resume for the substitute.

The Contracting Office's approval for any substitution will be in writing through a modification to the contract.

For this requirement, the NSF names the following key personnel.

<u>Individual's Name</u>	<u>Position</u>
To be determined (TBD)	TBD

Training Materials

Training texts, workbooks and other materials for participants shall be provided by the contractor. NSF will provide all meeting facilitation supplies such as flip charts, markers, etc.

Tentative Agenda

The training conference will provide for each of the major training topics (shown with an asterisk) to be introduced with a plenary presentation/instruction/discussion. The two CBC teams will then meet separately in breakout rooms for intensive discussions and coaching.

Day One

8:30 am - 4:30 pm
Introductions

- Overview from each Phase I team
- * Strategic Planning I
 - * Leadership and Team Development

Up to 9:00 pm

Optional coaching, as requested

Day Two

8:30 am - 4:00 pm

- * Strategic Planning II
- * The CBC/CCI context for Strategic Planning (COTR may present or assist here)