

## Chapter 5

# Best Practices and Strategies for Outsourcing Coaching Services and for Designing and Developing an Internal Coaching Department

### ABSTRACT

*This chapter offers best practices, methods, planning options, and comparison information for two distinct scenarios for the implementation and utilization of retention and student success coaching services. The first implementation scenario is for institutions that want to consider outside coaching professionals to support their campus or program through an outsourced vendor contract. The second scenario is for institutions that are considering designing and developing a coaching department within their institution or organization. The chapter provides evaluation and selection criteria for selecting an outsourced coaching service, discusses a set of key implementation considerations, and outlines the operational steps to implementation of outsourced coaching services. The chapter recommends that institutions conduct an open RFP process for the selection of an outsourced coaching vendor. A sample timeline with a sample RFP are provided, along with a proposed implementation process. For institutions interested in designing and developing their own internal coaching operations, the chapter offers six key considerations and core principles to guide the project in order to ensure a focus on the most important coaching concepts and elements.*

DOI: 10.4018/978-1-5225-5948-1.ch005

## **EVALUATION AND SELECTION OF OUTSOURCED COACHING PROVIDERS**

For institutions and programs that are new to coaching, the recommended approach is to use an outsourced contract model to create a partnership with an established and successful coaching organization. The preferred method for evaluating and selecting a coaching organization and then awarding a carefully tailored contract is via a formal Request for Proposal (RFP) process. The following implementation steps and sample documents are designed to walk administrators through a formalized RFP driven evaluation and selection process. The sample RFP for Coaching Services was designed and drafted to comply with California's open meeting and public procurement requirements but can easily be tailored to meet the laws of other states and other statutory and/or institutional requirements.

While the coaching services contract will be the main driver for implementing and establishing coaching services, smaller related policies and implementations should also be incorporated into the scope of work. For example, communication protocols and training sessions designed to develop comprehensive knowledge about the benefits of coaching and the actual coaching services that are available under the contract will help to promote understanding of the contract and buy-in for the coaching services across the institution. Another small support project to consider would be the development and implementation of active referral pathways to the coaching program among program faculty and administrative staff. Finally, the internal development of complementary support policies and services at both the institution and the participating program level will be essential to successful implementation of the coaching services.

### **Key Implementation Considerations**

Especially at large public institutions, one of the expected impediments to implementation of an outsourced coaching contract will be the negative perception of a top-down decision to contract out for coaching services. Other obstacles could include a generalized fear of outsourcing and a perceived negative impact on existing campus and program personnel. At unionized institutions and organizations, critical components of any early stage

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