



## Online Leadership Training For: **CareerSource Central Florida**

---

**Prepared on:**            **November 15, 2022**

**Prepared for:**         Rosa Espinal-Perry, Sr. HR Manager, CareerSource Central Florida

**Prepared by:**         **Meeka Lu**  
Product Manager  
McLean & Company, a division of Info-Tech Research Group Inc.

3960 Howard Hughes Parkway  
Suite 500  
Las Vegas, Nevada  
89169

CareerSource Central Florida – Effective Feedback & Coaching and Foundational Communications

**INSIDE THIS STATEMENT OF WORK**

**A. EXECUTIVE SUMMARY .....3**  
**B. LEARNING OBJECTIVES .....4**  
**C. SCOPE AND ASSUMPTIONS .....5**  
**D. FEES AND TERMS .....7**

## CareerSource Central Florida – Effective Feedback & Coaching and Foundational Communications

### A. EXECUTIVE SUMMARY

#### BACKGROUND

McLean & Company (“McLean & Co.”) is the trusted partner of HR and leadership professionals around the world. Our memberships are designed to provide what HR and leadership teams need to drive organizations forward.

McLean & Company has developed a series of robust online trainings for people managers based on our extensive research into HR and leadership topics. Selected online training topics include: Give Effective Feedback & Coaching and Foundational Communications. Our proposed training approach will leverage our research informed frameworks to provide training, facilitation, and materials to help build skills among employees.

We are confident that McLean & Company’s high-quality research and approach to online training will provide the best value to **CareerSource Central Florida**.

#### INVESTMENT SUMMARY

The scope and approach outlined will be delivered starting on December 2, 2022, and December 9, 2022, (CareerSource Central Florida and McLean & Company) Pricing for this engagement is outlined in the membership fees per our signed agreement. Based on our experience with similar initiatives, we are confident that we can deliver a highly successful project within this timeframe.

#### INTENDED AUDIENCE

- Give Effective Feedback & Coaching and Foundational Communications is designed for an audience of people managers at a non-executive level.
- A minimum of 7, up to a maximum of 15 participants per cohort from CareerSource Central Florida. CareerSource Central Florida will provide a list of learners, their current titles, and reporting relationships via secure link 2 weeks prior to the training delivery. The participant lists are due as follows:
  - Effective Feedback & Coaching: November 17, 2022
  - Foundational Communications: November 24, 2022

Determination, availability, and briefing of qualified participants will be the responsibility of CareerSource Central Florida.

## CareerSource Central Florida – Effective Feedback & Coaching and Foundational Communications

### EXPECTATIONS OF LEARNERS

- All learners are expected to attend the scheduled live online session during the pre-determined session time.
- Availability and briefing of participants in advance regarding expectations and time required for the training, as well as ensuring each participant can access McLean & Company's online training platform (currently Microsoft Teams but subject to change) will be the responsibility of CareerSource Central Florida.

### MCLEAN & COMPANY TEAM

A member of the McLean & Company HR Research & Advisory team will be provided to deliver this training. Representative biographies of the McLean & Company analyst bench can be found [here](#).

## B. LEARNING OBJECTIVES

### COURSE OVERVIEW

McLean & Company's facilitator will lead Give Effective Feedback & Coaching and Foundational Communications. The course format includes short, stimulating presentations conducted live via McLean & Company's online platform (currently Microsoft Teams but subject to change), followed by peer discussion and virtual activities designed to help participants apply what they've learned to their own roles. The learning will be reinforced with a participant handbook for the learners' ongoing reference.

#### **Give Effective Feedback & Coaching and Foundational Communications and learning objectives:**

- **Give Effective Feedback & Coaching**
  - Learn the importance of giving, asking for, receiving, and acting on feedback.
  - Practice using the 3C model in a virtual environment to constructively frame feedback.
  - Adopt a coaching mindset to empower employees to direct their own development.
  - And learn to use the 4A model to coach in a virtual environment, encouraging two-way communication.
- **Foundational Communications**
  - Practice the communication process steps.
  - Formulate clear, strategic messages & receive feedback on progress.
  - Identify the role trust plays in communication.
  - Practice coaching others to improve their communication skills.

## CareerSource Central Florida – Effective Feedback & Coaching and Foundational Communications

### C. SCOPE AND ASSUMPTIONS

#### SCOPE DEFINITIONS

##### **In-Scope – The following activities will be delivered as part of this outline:**

- Stated deliverables and activities as outlined above
  - Effective Feedback & Coaching: December 2, 2022, at 9:00am-12:00pm ET
  - Foundational of Communications: December 9, 2022, at 9:00am-12:00pm ET
- Participant handbooks and materials for training activities
- Feedback summary report after the cohort is completed, provided more than 25% of participants complete the feedback survey
- Feedback call with CareerSource Central Florida on the week of February 6, 2023 for both cohorts

##### **Out of Scope – The following activities will not be delivered as part of this outline:**

- Detailed business cases for future development recommendations
- Detailed work-plans for recommendations and change management/communications
- Advice and guidance around the performance and potential of participants
- In-person, onsite training
- Additional live sessions if an individual misses a live online session
- In person coaching or advice on employee relations, labor relations or legal issues
- Recordings of training sessions or copy of slides
- Supplementary eLearning modules
- Feedback summary report after the cohort is completed if fewer than 25% of the cohort provide responses

#### PROJECT ASSUMPTIONS

Project timeline and resultant cost have been based, in part, on the following assumptions:

- CareerSource Central Florida will provide a dedicated resource(s) for the entirety of the engagement.
- CareerSource Central Florida will provide designated McLean & Company personnel access to systems and documentation as required.
- CareerSource Central Florida will provide the required technology (e.g. computer with video camera and built-in microphone) and a suitable internet connection for participants to complete the course, and will ensure participants are able to access McLean & Company's online training platform (currently Microsoft Teams but subject to change).
- CareerSource Central Florida will provide names & emails of participants at least 2 weeks before each course is scheduled to start.
- CareerSource Central Florida is responsible for ensuring participants attend online training sessions and complete the required pre/post work.
- CareerSource Central Florida will advise McLean & Company if an individual is unable to attend the training session after registering. If McLean & Company is notified before the training session

## CareerSource Central Florida – Effective Feedback & Coaching and Foundational Communications

starts, HR may substitute another participant. However, new learners cannot be added to a course less than 48 hours before the session starts.

- CareerSource Central Florida will ensure participants and stakeholders understand the purpose and intended audience of the training.
- CareerSource Central Florida will ensure participants are in alignment with the intended audience.
- Training outputs and deliverables will be based on McLean & Company tools and templates. The McLean & Company tools and templates will be streamlined to ensure effective communication.
- The handbook that participants receive can be used in perpetuity by participants, provided that CareerSource Central Florida does not resell it or allow it to be resold. The contents of the handbook & the training slides are owned by McLean & Company.
- McLean & Company and its affiliates may use any portion of the deliverables at their discretion, provided that CareerSource Central Florida identity and any confidential information are removed.
- This session will be hosted on Microsoft Teams. CareerSource Central Florida will ensure that participants can appropriately access Microsoft Teams.
- CareerSource Central Florida assumes responsibility for adherence to any applicable laws and indemnifies and saves harmless McLean & Company, its officers, agents, employees, and servants from all claims, suits, or actions of every name, kind, and description, brought for, or on account of training and facilitation related to DEI initiatives provided to CareerSource Central Florida and its employees.

### LOCATION, DATE & POINT OF CONTACT

The project will be conducted starting December 2, 2022, and December 9, 2022 on McLean & Company's learning platform.

	<b>McLean &amp; Company Contact</b>	<b>CareerSource Central Florida Contact</b>
<b>Name</b>	<i>Jide Egbewumi</i>	<i>Rosa Espinal-Perry</i>
<b>Title</b>	<i>Associate Director, Member Services</i>	<i>Sr. HR Manager</i>
<b>Phone</b>	<i>1 877 281 0480 Ext. 3720</i>	<i>1 407 872 9579</i>
<b>Email</b>	<i>jegbewumi@mcleanco.com</i>	<i>respinal-perry@careersourcecf.com</i>

CareerSource Central Florida – Effective Feedback & Coaching and Foundational Communications

**D. FEES AND TERMS**

This is a project where the pricing for this engagement is included in the membership fees per our signed agreement.

The maximum amount for which McLean & Company or its related entities is liable to CareerSource Central Florida with respect to services provided under this Statement of Work, for any reason whatsoever including, without limitation, negligence, is Two Million Dollars (\$2,000,000) CDN.

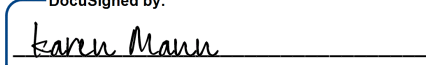
To minimize billable expenses and to facilitate effective staff scheduling, training dates must be finalized, and a signed version of this SOW returned to the assigned McLean & Company contact at least four weeks in advance of training. Once this SOW is signed, the above dates are considered final. Changes to finalized training dates with less than 30 days' notice are subject to a rescheduling fee of 25% of the program price for both engagements and associated rescheduling expenses. Training expires without refund or credit 1-year after purchase.

IN WITNESS WHEREOF this agreement has been entered into by the parties hereto as of

\_\_\_\_\_

**McLean & Company,**  
**a division of Info-Tech Research Group Inc.**  
("McLean & Co")

**CareerSource Central Florida**

DocuSigned by:  
  
Authorized signature

\_\_\_\_\_  
Authorized signature

Name: karen Mann

Mimi Coenen

Title: VP, HR Research

Title: \_\_\_\_\_

Date: 15 November 2022

Date: \_\_\_\_\_

I have authority to bind the company

I have authority to bind the company