

Technical Specifications (In-Cash Procurement)

On-line Coaching Technical Specifications

These technical specifications have been prepared for the new RFQ to be launched to continue On-line Coaching services at ITER

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1 Preamble

This Technical Specification is to be read in combination with the General Management Specification for Service and Supply (GM3S) – [Ref 1] that constitutes a full part of the technical requirements.

In case of conflict, the content of the Technical Specification supersedes the content of Ref [1].

The ITER Project

ITER is a large-scale scientific experiment that aims to provide for and to promote cooperation among the Members of the ITER Organization on the ITER Project, an international project that aims to demonstrate the scientific and technological feasibility of fusion energy for peaceful purposes, an essential feature of which would be achieving sustained fusion power generation.

ITER Organization (IO) is an Intergovernmental Organization. This public International Organization was established by an International Agreement signed by the seven Members of the Organization (European Union, Japan, the People's Republic of China, India, the Republic of Korea, the Russian Federation and the USA), and is subject to International Law.

The ITER Organization is staffed by individuals from all over the world (34 nationalities) working together for the success of the ITER Project. More than 1100 employed staff and 1000 external contractors currently work for the Project in Saint-Paul-lez-Durance, France.

Further information can be found on the ITER website: <http://www.iter.org/>

2 Purpose

A key factor in organizational performance is an enabling work environment. In the ITER multicultural environment, the Human Resources (HR) Division wants to enforce the IO CARE values (Collaboration, Accountability, Respect and Excellence) as staff satisfaction has repeatedly been shown to have a strong and enduring impact on performance, engagement and retention.

In this context, and while implementing a matrix organization structure, the IO implemented an online coaching service in April 2022 through an “on demand” coaching desk. The service has been welcomed by managers and staff members.

The IO aims therefore to continue offering an online coaching solution for IO managers and staff members in support of their professional and personal development. The online coaching solution will contribute to:

- Retaining and developing talents;
- Strengthening IO managerial culture
- Addressing communication and/or behaviour issues;
- Fostering strong leadership;
- Enhancing the IO staff competencies and organizational needs considered critical for successful the ITER Project execution.

3 Acronyms & Definitions

3.1 Acronyms

Abbreviation	Description
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CRO	Contract Responsible Officer
GM3S	General Management Specification for Service and Supply
IO	ITER Organization
IT	Information Technology
RO	Responsible Officer
HRD	Human Resources Division
TM	Talent Management Section (within HRD)
TRO	Technical Responsible Officer

3.2 Definitions

Coachee: IO manager or staff member benefiting from coaching.

Contractor: An economic operator who has signed the Contract in which this document is referenced.

Line Manager: A person member with direct managerial responsibility inc. performance management, time management, competencies and career development.

Matrix Manager: A person (e.g: a Project Leader) who supervises a staff member day-to-day activities, providing oversight and guidance in the execution of their work.

4 Applicable Documents & Codes and standards

4.1 Applicable Documents

This is the responsibility of the Contractor to identify and request for any documents that would not have been transmitted by IO, including the below list of reference documents.

This Technical Specification takes precedence over the referenced documents. In case of conflicting information, this is the responsibility of the contractor to seek clarification from IO.

Upon notification of any revision of the applicable document transmitted officially to the contractor, the contractor shall advise within 4 weeks of any impact on the execution of the contract. Without any response after this period, no impact will be considered.

Ref	Title	IDM Doc ID	Version
1	General Management Specification for Service and Supply (GM3S)	82MXQK	1.4
2	ITER Code of Conduct	4FDYTY	

4.2 Applicable Codes and Standards - Not applicable

5 Scope of Work

This section defines the specific scope of work for the service, in addition to the contract execution requirement as defined in Ref [1].

The Contractor will provide an integrated and customized online coaching program that supports the development of all IO Managers & staff in the limit of

The duration of the Service Contract will be 3 years firm with 2 optional years.

The service is offered to a maximum of 160 staff members, managers included, on a basis of: 60 registrations the first year of contract implementation, and 50 registrations the second and third year.

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The expected starting is April 2025.

5.1 Scope of work #1: Online Coaching Sessions for Managers

5.1.1 Description

The coaching aims to build managerial skills and empower managers to lead their teams. The coaching may focus on, but shall not be limited to:

- Women Leadership;
- Developing specific behaviour competencies identified through performance reviews, 360° feedback, or staff survey such as communication and feedback competencies;
- Developing Organizational and time management skills;
- Helping managers thinking about their role, organization, or strategy in a different way;
- Supporting managers in understanding the matrix organization and seeing their own behavior from a new perspective; etc.

The coaching will need to take into consideration the cultural and professional diversity of managers at ITER, and should help to develop a managerial culture at ITER based on existing managerial best practices, the ITER values and Project objectives.

The contractor awarded this contract should be responsible for delivering:

- Pre-coaching assessment: including an online meeting with the coachee to assess their personal managerial style and practices, and to define the coaching objectives and potential KPI's to assess the efficiency of the coaching;
- Define if there is a need to involve the upper managerial level from the perspective of the coachee;
- Detailed individual coaching program per coachee including: Coaching objectives, number of coaching session and duration of the whole coaching, and dates for halfway coaching assessment and final coaching evaluation and feedback;
- Halfway coaching report (written or through meeting);
- Individual coaching sessions in English as defined in individual coaching program. However, sessions may be conducted in another language about agreement between the coach and coachee;
- Final coaching evaluation and feedback.

5.1.2 Service Duration

For the duration of the contract:

- Individual coaching sessions in English of 45 min to 1 hour per session for a minimum of 3 hours and maximum of 8 hours.
- Possibility to stop at 5 hours and to extend up to 12 hours upon agreement from HRD.

They are currently 115 managers (inc. line managers and matrix managers).

5.2 Scope of work #2: Online Coaching Sessions for Staff Members

5.2.1 Description

The coaching aims to support staff members personal and professional development. The coaching may focus on, but shall not be limited to:

- Helping staff member understand their role and improve their impact;

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- Providing staff members with useful tools and tips on how to be more efficient in managing their responsibilities;
- Managing change and developing resilience;
- Improve specific competencies identified for their job through routine reviews such as communication;
- Supporting the development of future women leaders;
- Addressing career development; etc.

The contractor awarded this contract should be responsible for delivering:

- Pre-coaching assessment: including an online meeting with the coachee, and their manager (optional) depending on the topic(s) to address, to understand the coaching context and to define the coaching objectives and potential KPI's to assess the efficiency of the coaching;
- Define if there is a need to involve the upper managerial level from the perspective of the coachee;
- Detailed individual coaching program per coachee including: Coaching objectives, number of coaching session and duration of the whole coaching, and dates for halfway coaching assessment and final coaching evaluation and feedback;
- Halfway coaching report (written or through meeting);
- Individual coaching sessions in English as defined in individual coaching program. However sessions may be conducted in another language about agreement between the coach and coachee;
- Final coaching evaluation and feedback

5.2.2 *Service Duration*

For the duration of the contract:

- Individual coaching sessions in English of 45 min to 1 hour per session for a minimum of 3 hours and maximum of 8 hours.
- Possibility to stop at 5 hours or extend up to 12 hours upon approval from HRD.

This covers circa 1100 staff members.

5.3 **Scope of work #3: Online Coaching Platform**

5.3.1 *Description*

The provider shall provide the IO with full access to an integrated digital solution including:

- Access to communication material to:
 - Inform IO staff of the online coaching services offered
 - Promote online coaching activities within the organization
 - How-Tos for coachees and HRD Administrators
- A selection of coaches in a pool of certified, multicultural, experienced coaches;
- A tool to book coaching sessions with a selected coach and to attend individual coaching sessions booked;
- Space to record all important and relevant documentation concerning the coaching program: initial program including objectives, duration and KPI's, halfway coaching report, final coaching feedback, etc;
- Possibility of instant messaging with their coach;
- Possibility to provide notes, recommended readings, lectures, videos and all relevant micro-learning tools and contents;

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- Access to coaching progress and analysis reports for HRD to monitor advancement of all individual coaching programs.

5.3.2 Service Duration

The Platform shall be available for the duration of the contract.

6 Location for Scope of Work Execution

The coaching sessions will take place online using Teams or similar application.

7 Responsibilities

7.1 Contractor's Responsibilities

The contractor shall:

- Nominate a Project Manager interfacing with the ITER RO;
- Provide experienced (at least 10 years coaching experience) and certified (ICF: International Coaching Federation, EMCC: European Mentoring and Coaching Council) coaches to carry out individual coaching sessions On line and in English (a pool of at least 20 Certified experienced and multicultural coaches ; CV's to be provided);
- Agree not to remove or reassign the coaches selected for the duration of the services, without the prior approval of the IO;
- Provide a progress and satisfaction report twice a year
- Respect coaching programs and coaching schedules;
- Provide the coaching supporting material in English;
- Provide to the IO with progress report analysis for each coaching session, as required;
- Collect individual evaluation sheets and develop synthesis for each coaching session;
- Provide a global monthly feedback (attendance, progress, difficulties);
- Provide a cost estimate all-inclusive and describe into details the objectives, program & timing of each individual coaching;
- Monitor the list of coachees based on the spontaneous registrations following their global communication to the persons listed in the data base communicated by the IO
- Issue satisfaction surveys for every individual coaching twice a year;
- Escalate promptly to the HRD any major issue identified in the course of coaching;
- Manage invitations to coaching sessions and reminders, attendance sheets ensuring that the whole database is properly informed.

7.2 ITER responsibilities

The IO shall:

- Nominate a HR Responsible Officer in charge of the following up of the project;
- Approve the coaching programs and all documents developed and prepared by the contractor;
- Approve any changes of selected coaches;
- Set up the registration modalities and share clear & detailed guidelines of the coaching Program with the contractor (including: conditions for registration and restrictions, duration and frequency of coaching sessions, maximum number of coachees per coach, possibilities to re match coach/coachee, specific reporting on 3 way conversations including managers etc.)

8 List of deliverables and due dates

The Contractor shall:

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1. Submit communication materials
2. Provide access to digital platform
3. Run a coaching pilot session (for HRD)
4. Perform the on-line corresponding individual Coaching sessions
5. Run the individual half-way coaching assessments
6. Run the end of coaching evaluation and feedback
7. Run coaching evaluations and make synthesis of evaluations to be shared with HRD
8. Make any adjustments on the coaching sessions, material and/or organization as necessary

Each coaching session will be requested by the IO through a monthly Instruction To Proceed (ITP) including due dates of deliverables.

The deliverables shall be compliant with the applicable HR process and procedures.

The Contractor shall perform all the necessary modifications or iterations to the deliverables if required by IO during progress meetings.

The Contractor shall comply with the above-described responsibilities and will be considered completed after ITER has accepted the last deliverable.

9 Quality Assurance requirements

The Contractor shall have an ISO 9001 certified quality system or alternatively a QA Program approved by QARO.

The general requirements are detailed in [ITER Procurement Quality Requirements \(ITER_D_22MFG4\)](#).

Prior to commencement of the task, a Quality Plan must be submitted for IO approval giving evidence of the above and describing the organization for this task; the skill of workers involved in the study; any anticipated sub-contractors; and giving details of who will be the independent checker of the activities (see [Procurement Requirements for Producing a Quality Plan \(ITER_D_22MFMW\)](#)).

Documentation developed as the result of this task shall be retained by the performer of the task or the DA organization for a minimum of 5 years and then may be discarded at the direction of the IO. The use of computer software to perform a safety basis task activity such as analysis and/or modelling, etc. shall be reviewed and approved by the IO prior to its use, in accordance with [Quality Assurance for ITER Safety Codes \(ITER_D_258LKL\)](#).

10 Safety requirements

ITER is a Nuclear Facility identified in France by the number-INB-174 (“Installation Nucléaire de Base”).

For Protection Important Components and in particular Safety Important Class components (SIC), the French Nuclear Regulation must be observed, in application of the Article 14 of the ITER Agreement.

In such case the Suppliers and Subcontractors must be informed that:

- The Order 7th February 2012 applies to all the components important for the protection (PIC) and the activities important for the protection (PIA).
- The compliance with the INB-order must be demonstrated in the chain of external contractors.
- In application of article II.2.5.4 of the Order 7th February 2012, contracted activities for supervision purposes are also subject to a supervision done by the Nuclear Operator.

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For the Protection Important Components, structures and systems of the nuclear facility, and Protection Important Activities the contractor shall ensure that a specific management system is implemented for his own activities and for the activities done by any Supplier and Subcontractor following the requirements of the Order 7th February 2012 [20].

11 Special Management requirements

11.1 General

The Contractor's offer shall demonstrate his understanding of the needs and shall describe his proposed methodology.

- The coaching sessions will take place online using Teams or similar application;
- The size of company will be minimum 50 experienced, certified and multicultural coaches to ensure diversity and continuity of service.

11.2 Professional Qualifications

The technical and professional capacity of the professionals/coaches in charge of the performance of the services shall demonstrate their relevant experience and background in the domain (resumes should show methodology and experience).

11.3 Language

The official language of the ITER project is English. Therefore, all input and output documentation relevant for this Contract shall be in English. The Contractor shall ensure that the trainers in charge of the performance of the training sessions have an adequate knowledge of English. This requirement also applies to the Contractor's staff participating in meetings with the ITER Organization.

11.4 Confidentiality

The Contractor agrees to treat all areas related with performance of their task with strict confidentiality. The Contractor shall be liable for its staff and for disclosure of the information and documents communicated to for fulfilment of the contract to any other individuals than those needing to have knowledge thereof.

11.5 Intellectual Property

The Contractor shall complete the Form – **Declaration of Intellectual Property** included in the invitation to tender package in order to decline the intellectual property rights applicable to the training tools and materials.

11.6 Work Monitoring

The Talent Management (TM) Section Leader is nominated as RO for the follow up of the contract and the Talent Development Administrator will act as TRO

Each participant will also receive, at least one week prior to the first individual coaching session, the coaching program including objectives, duration, schedule, profile of coach selected, etc..

As and when needed, before an individual coaching session the provider will interact with the TRO to determine the specifics of the session (participant profile, expected outcomes).

A follow-up will be done, with an evaluation sheet that will be filled in by the participants; according to the result, further discussion for improvement might be scheduled with the Consultant.

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11.7 Meeting Schedule

Before the first session, a kick-off meeting will be organized within 1 month after the contract signature to clarify the objectives, to define the role of the parties and the execution plan for the services.

Further meetings could be scheduled during the contract execution period to reevaluate the needs.