



CPH EMOTIONAL INTELLIGENCE COACHING CIRCLES PROPOSAL

April 25, 2025

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BACKGROUND

On April 16, 2025, a strategic planning meeting was held to review the outcomes of recent emotional intelligence (EI) training initiatives and to develop a forward-looking plan for enhancing organizational effectiveness at the Center for Public Health Innovation (CPH). Key participants included Annie, Sapna, and Christa, representing leadership, training development, and organizational strategy.

The meeting focused on evaluating the strong engagement and positive feedback from prior EI sessions, while also addressing emergent organizational challenges—most notably, the integration difficulties between the recently merged Center for Public Health Innovation and the Office of Planning Quality Improvement. These challenges highlighted the need for additional team-building efforts and structured interventions to foster collaboration, trust, and alignment across teams.

The group explored several initiatives, including the implementation of EI coaching circles, the design of an organizational effectiveness workshop targeting team dynamics and leadership development, and the expansion of one-on-one coaching and succession planning for mid-level managers. Discussions also covered operational considerations such as program frameworks, timelines, participant engagement strategies, and alignment with existing organizational priorities and budgets.



ASSUMPTIONS

- Objective is to develop and sustain an emotional intelligent culture in the organization
- EI-related funding must be used by December 31, 2025
- Any new EI work will fall within the parameters and budget of existing PO for EI work
- Communication and marketing materials to promote enrollment will be developed for CPH to distribute
- Monthly sessions will be open enrollment
- Sessions will be open to three levels by level by month
- Sessions will run from August 2025 - December 2025
- We will pilot number of sessions, format, topic, interest in August 2025 and make changes as necessary for future sessions
- Coaching circles can be offered virtual and in-person
- EI Workshop will be offered in-person



SOLUTION

EI Coaching Circles

Format of coaching circles is as follows

- Pre-work
- Approach 1
 - Come prepared to share an EI challenge related to the monthly topic (5 min or less)
 - Peers will get to ask 1 clarifying question each (1 min) o Person sharing challenge will answer the question (2 min)
 - Colleagues in the Circle will have an opportunity to coach you on how to manage this challenge (ex. what's worked for me..., try this tactic..., when I was in that situation in the past...)
 - (non-redundant peer coaching / 2 min mx)
 - LL consultant will add final thoughts and manage time
- Approach 2
 - LL consultant will facilitate a dynamic conversation using EI Card Sorts, AI coach feedback, Video Drip-feeds
- Fieldwork

Framework

- Monthly facilitated coaching circles for primarily targeting
 - Managers
 - PM2s
 - PM3s
- Groups of 7-10 to ensure deep discussion and allow time for peer coaching
- Six coaching circles per month
 - Two for managers (combination of three remote and three in-person sessions)
 - Two for PM2s (combination of three remote and three in-person sessions)
 - Two for PM3s (combination of three remote and three in-person sessions)
- Monthly topics will be identified. If something more relevant or timely arises in the organization, the topic can be changed.
- Recommended monthly topics, based on EI workshop feedback, include various deeper dives into tools or EI skills:
 - Lead the Energy: Emotional Contagion and Conscious Leadership
 - "I'm emotionally intelligent, what about you?"
 - The EQ Edge: Powered by Your Strengths
 - Master the Moment: Practicing Emotional Intelligence on the Spot
 - Quiet the Critic, Strengthen the Self through EI

Development

- Develop remote and in-person sessions monthly
- Prepare communication
- Create user guides and custom EI reinforcement and fieldwork to sustain learning
 - AI coach – license for 1 “seat” per participant for 2 months – 30 “seats” included
 - EI card sort
 - EI video drip-feeds capturing how to be emotionally intelligent relative to recommended topics
- Create forms and reporting for measurement
- Each coach will capture session themes



Delivery

- Coaching Circles will run monthly from August 2025 - December 2025
- We will pilot number of sessions, format, topic, interest in August 2025 and make changes as necessary for future sessions
- Below is the recommended schedule for Coaching Circles

Remote	In-Person
Morning Session: 8:30 - 9:30am	Morning Session: 10:30 - 11:30am
Lunch Session: 12:00–1:00pm	Lunch Session: 12:00–1:00pm
Afternoon Session: 3:30 - 4:30pm	Afternoon Session: 1:30 - 2:30 pm

Measurement

- Monthly post coaching circle
 - Each coach will capture session themes
 - Each coach will submit anonymous EI themes via an online form
 - Themes will be rolled up into a single report monthly and shared with client
 - At conclusion of coaching circles, all themes will be aggregated highlighting challenges and successes with building an EI culture
- Feedback survey to be completed by all participants. Questions may include:
 - Did you attend an in-person EI workshop in 2025?
 - How did participating in team coaching sessions,
 - change your mindset as you return to work
 - for the following week
 - To what degree did the reinforcement work you completed support your sustained ability to practice EI?
 - When did you find yourself using the AI coach?
 - What are continued challenges for you to practice EI?
- Compare session themes; survey data and compare both to which divisions participated. The goal of measurement is to understand where CPH is making progress and what supported that progress.

One additional ½ day in-person EI workshop

Deploy in person training for up to 25 participants (including EIQ assessment).



STAFFING

Our team consists of 30 consultants all with deep experience in preparing talent in organizations to be more impactful leaders. Our team's experience in house and as consultants has provided us unparalleled experience – from leading Strategy, Talent, Learning, OD and HR systems for Fortune 500 and Global 100 business, to working in over 15 countries to deliver leadership development, executive coaching, and DEI solutions.

- **Experienced Trainers:** we have delivered leadership training to over 8K participants from front line to board levels. Notably, among the team we propose to City of Hilliard, we have multiple consultants with experience in healthcare including former heads of talent for healthcare and pharma organizations and retired physician consultants.
- **Experienced Coaches:** we maintain coaching credentials at the highest levels and have delivered over 3K hours of coaching to leaders and teams.
- **Real World Work / Leadership Experience:** On average our team has 20+ years of work experience, 15+ years leading from front line to top executive levels positions.
- **Thought Leaders:** With two books, dozens and other publications and regular speakers at conferences, we have established ourselves as thought leaders in our domain areas.
- **Global Perspective / Reach:** Our team is diverse by design. They have delivered in over 10 countries including US, Canada, Brazil, Argentina, Mexico, UK, the Netherlands, Belgium, Germany, France, Switzerland, Singapore, and India. Our extended faculty can deliver across the Americas, Europe, and parts of APAC.
- **Strategy and Transformation Competence:** We have a core competence in leading the development, translation and implementation of strategy having led Organizational / HR strategy and translating it into leadership, OD, and HR solutions to enable organizations to realize it through their people. In addition, we have led change management teams (up to 20) and delivered change management for organizations in the Americas and Europe.
- **Experienced Communicators:** Combining our experience presenting to all levels, from front line employees to boards, in several countries, we understand communication at a truly global level.
- **Experienced in the content listed:** Our facilitators have delivered all the topics highlighted and, in many cases, have led the design, development and delivery of these content areas for organizations content.



SERVICE MANAGEMENT

- Every engagement is assigned a Leverage HR Partner Lead. Large engagements are staffed with an operations manager to coordinate all activities, and complex engagements are staffed with a project manager to oversee multiple initiatives.
- Leverage HR commits to responding to clients within 48 hours.
- In case of illness or any other unforeseen circumstances, Leverage HR will take responsibility to send another resource to the client. Leverage HR will always inform the client about any changes in advance.
- If a replacement is not possible or not desired by the client, Leverage HR will offer a new date for the program.
- Leverage HR will provide regular summaries of services delivered and cadenced service review meetings with customers to understand what has been completed and discuss any questions or concerns.
- Services reviews occur quarterly, bi-annually or annually depending on how much work is being delivered to the client.
- Any change of scope will require a change control



PRICING

We are honoring 2024 pricing originally agreed to for the PO.

We are working with the budgetary parameters of PO487803 created for EI work in the organization.

Coaching Circle Initiative - \$39,500

\$132 / participant for coaching (up to 60 participants per month)

Price includes:

- Communication
 - Marketing material to promote coaching circles / themes / tools
 - Instructor guides and administration for tools and fieldwork
- Development
 - Sponsor meetings – one prior to every month
 - Develop slides, facilitator guide and participant tools
 - Video drip-feeds
 - EI card sort
 - AI coach (license for 1 “seat” per participant for 2 months) – 30 seats included
 - Additional “seats” above 30 = \$150/license
- Delivery
 - Three in-person sessions
 - Three remote sessions
 - Submission of coaching themes
- Measurement
 - Monthly post coaching circle
 - Feedback survey
 - EI progress report

One ½ day EI Workshop - \$6825

- Deploy in-person training for up to 25 participants (including EIQ assessment) per participant run charge @ 25 pp = \$273
- Only billed if there is interest and enrollment



TERMS & CONDITIONS

Invoicing

- Client will be invoiced per the schedule below
 - Total billing will be equally distributed monthly from project kickoff

Terms

- Payment terms on invoices are net 30 days from bill date
- Please be advised that a monthly late fee of 1.5% of the total amount due will be charged on overdue payments. Payments are considered overdue when they are Submitted more than 30 days after this invoice is issued.
- All work in this proposal will occur and be invoiced by 12/31/2025
- Any outstanding hours included in final invoice

Expenses

- Leverage Leadership will follow the client's T&E guidelines
- All expenses will be pre-approved
- Expense invoices will include receipts and details
- Expenses are to be paid net 10 days

Postponement or Cancellation

Leadership Development, Training, Workshops

By Client:

Fees

- Postponement option - If client selects to reschedule the session, the new date can be no more than 60 days from the original date.
- There is no charge if the client informs Leverage Leadership more than 30 days prior to the program that they must cancel or postpone.
- If the client informs Leverage Leadership 14 to 29 days prior to the agreed date, 50% of the fees are payable.
- If the client informs Leverage Leadership less than 14 days prior to the program, 100% of the fee will be charged.

Out-of-pocket expenses

- Regardless of the date that the client informs Leverage Leadership, 100% of already incurred, non-refundable costs (e.g., flight or train reservations) will have to be reimbursed.

By Leverage Leadership:

- In case of illness or any other unforeseen circumstances, Leverage Leadership will take responsibility to send another resource to the client. Leverage Leadership will always inform the client about this change.
- If a replacement is not possible or not desired by the client, Leverage Leadership will offer a new date for the program no more than 60 days from the original date.

Confidentiality

The terms and conditions of this Agreement are confidential and shall not be disclosed by either party without the other party's written consent. All information and materials disclosed by Leverage Leadership to the Client in connection with the work specified in this proposal constitute confidential and proprietary information ('Confidential Information'). Client agrees to treat all such confidential information with the utmost confidentiality, refraining from disclosing, reproducing, or



using it for any purpose other than the intended collaboration. It is understood that all LL materials will be deemed proprietary and cannot be used, copied, or distributed without LL's permission.

This agreement does not grant any license or ownership rights to Client. Any unauthorized use or disclosure may result in legal action. This confidentiality obligation survives the termination of our business relationship.

Additional Services

If the client decides to extend this engagement, or if the contract's scope of services expands beyond those mentioned above, or consulting services are needed that fall outside this contract, Leverage Leadership will document the nature of the services to be provided as an addendum/change of scope to this engagement letter and both parties will sign and date the addendum.

Limit of Liability

Leverage Leadership shall not be liable hereunder for any indirect, consequential or incidental losses or damages including, but not limited to, lost profits or damages for failure to achieve cost savings, regardless of whether any such losses or damages are characterized as arising from breach of contract, tort or otherwise, even if Leverage Leadership is advised of the possibility of such losses or damages, or if such losses or damages are foreseeable. In no event will Leverage Leadership's liability exceed the total amount paid to Leverage Leadership under this letter agreement.



ACCEPTANCE

If this proposal meets with your approval, please indicate your acceptance with your electronic signature. You are welcome to contact us at +1 (614) 219-9767 or email info@LeverageLeadership.com with any questions you may have. We are looking forward to the opportunity to collaborate with you and are excited to get started!

Signature:

Sapna Welsh

Partner

Leverage Leadership, LLC

Signature:

Annie Delawder

Workforce Innovation Manager

Columbus Public Health



WHY LEVERAGE LEADERSHIP?

At Leverage Leadership, we believe in the transformative power of leadership to drive organizational success and foster a thriving workplace. Our core values guide us on this journey. We start with you, tailor to your organization and culture and measure impact by increments of change. Leverage Leadership is an award-winning firm founded in 2006 by Sapna Welsh. Today, Leverage Leadership focuses on serving public sector and non-profit healthcare clients in 10 states. Our team of 30 consultants have a minimum of 20+ years' experience, are credentialed at the highest levels, can deliver in multiple languages and have held executive and senior leadership positions in HR, Learning, and Talent prior to joining Leverage Leadership.



Our Services Include:

Leadership Excellence

- Custom leadership training & workshops
- One on One executive / leader coaching
- Diagnostic-driven team coaching
- Targeted support for leaders in new roles

Inclusion Excellence

- DEI strategy
- Targeted development
- Workshops & training to foster connected and inclusive cultures of belonging

Organizational Effectiveness

- Workforce planning and people strategy
- Talent process design (on boarding, performance management, succession planning)
- Transformation, org design, change management



Awards:

- Inc. Magazine, Best in Business in the category for Coaching & Career Development (2023)
- Enterprising Women, Enterprising Woman of the Year Award (2023)
- Manage HR recognized as a 'Top 20 Diversity and Inclusion Companies' (2022)
- Columbus Business First awarded 'Outstanding Diversity Champion' (2022)
- Diversity/Career in Engineering & IT "for leading DEI work at Bank One" (9/2002)

Conference Highlights:

Firm Partners and consultants have spoken on leadership trends in conferences across many nations over the years.

US Venues

- APPA, National Conference, Keynote 8/24
- ElectriCities NC, National Conferences, Leadership Track, 1/24, Keynote 8/24
- Columbus Chamber of Commerce, 6/24, Panelist on topic of Leadership that Lasts
- OSU, Working MBA Commencement Speaker, 8/23
- OSU, MHR Lecturer: Foundations of International HR, 9/23
- Florida Municipal Electric Association, Presenter: Talent Trends in Public Power, 04/23
- PMI, Development Conference, Track Presenters: Diversity in Project Management 10/22
- HCI National Conference (Joint Action Agencies), Presenter: Fund the People: Talent Strategies 9/22
- Latina Mentoring Academy Panelist: 6/22
- Diverse Networks, Panelist: Career Management and Emotions 5/22
- Whalen Annual Members Conference, Keynote: Fund the People: HCM and Strategy 12/21
- TEDx Southlake Salon, Facilitator: Driving Social Change (w/ 4 US/South Asian Executives) 10/21
- DHL / WISC (Women in Supply Chain Conference), Keynote: Mentorship, Sponsorship, Allyship 5/21
- Financial Times / Headspring, Facilitator: Retaining and Supporting Women in the Midst of Covid's Impact 4/21
- National AACE Conference, Facilitator: Management Track 10/20
- Westerville Chamber of Commerce, Facilitator: Women in Business 10/19
- OSU, MBA Guest Lecturer: Leadership Legacy, 09/19 and Foundations of HRM, 09/18
- Columbus Logistics Conference, Panelist: Women in Logistics 5/18
- OSU COE, Facilitator: Building a Culture of Trust to Foster Diversity, Ohio, 4/18
- WELD Leadership Conference, Facilitator: 6/17 and 6/15
- Oracle Innovation Tour / Human Capital Institute, Keynote Presenter: 6/09

International Venues

- JDS Hollister, Global Leadership Forum, Barcelona, Spain, 5/24
- Bank of America, Key Note: Courageous Leadership, APAC 8/22
- AIG, Keynote: Harnessing Your Personal Power, Japan 11/21
- TEDx, Presenter: Worldly Women, Bonn, Germany, 6/14
- HR360 - HR Innovations Tour, Keynote Presenter, Connecting Business and HR Strategy, Vienna, Austria, 06/12



Publications:

Books

Women Leaders: The Power of Working Abroad

Washington, D.C.: Business Expert Press, 2019. Welsh, Sapna and Kersten, Caroline.

Worldly Women – The New Leadership Profile: How to Expatriate with Excellence

Washington, D.C.: iUniverse, 2013. Welsh, Sapna and Kersten, Caroline

- The research in these books continues to be some of the most comprehensive research completed on how to leverage international assignments to accelerate leadership development for women.
- Worldly Women received the Get Abstract book of the month award

Research

Women's Transition Barriers Study, Published 3/18 <https://leveragehr.com/resources/#ontheshelf>

- Leverage HR collaborated with the largest women's network in Belgium to carry out a thought-provoking study better understand what barriers women perceive are standing in their way to a next level role.
- We surveyed over 1000 women across twenty nations on what they need to move up.

Additional Publications

ASTD Wanted: Global Women Leadership Pipeline (9/15)

Time to level the international playing field (1/14)

SHRM Women Urged to Seek Expat Experience to Develop Leadership (12/14)

Where are Women in the Expatriate Workforce (1/14)

Huffington Post Breaking through the glass borders (7/13)

Fairygodboss 3 Effective Ways to Deal With Subtle Sexism In Your Office (2/18)

3 Tips that can help you Overcome your Confidence Gap (4/18)

