

**REQUEST FOR PROPOSAL  
MANAGEMENT CONSULTING SERVICES**

March 23, 2023

**To:** All Prospective Proposers  
**Subject:** Request for Proposals: Management Consulting Services  
**Date Issued:** [DATE]  
**Responses Due:** [April 10<sup>th</sup>, 2023]

**Owner**

Incline Village General Improvement District (IVGID or District)  
893 Southwood Blvd.  
Incline Village, NV 89451

IVGID RFP Contact: Sara Schmitz, Trustee  
[Schmitz\\_Trustee@ivgid.org](mailto:Schmitz_Trustee@ivgid.org) or 925-858-4384  
Melissa Robertson, District Clerk  
[mnrmp@ivgid.org](mailto:mnrmp@ivgid.org) or 775-832-1268

Field Code Changed

**About the District**

The District is a General Improvement District, established under Nevada Revised Statutes (NRS) Chapter 318 and chartered to provide water, sewer, trash and recreation services for over 9,000 residents in the communities of Incline Village and Crystal Bay, Nevada. Within the limits of the NRS, IVGID is empowered to determine what facilities and services it should offer that will preserve or enhance the general health, safety and welfare of the community. For more information about the District, please visit: <https://www.yourtahoeplace.com/ivgid>.

**Project Identification**

Project Name: Management Consulting Services

The purpose of this Request for Proposals is to select a qualified firm(s) to provide some or all of the outlined Scope of Work services.

**Delivery of Proposals**

Proposal packages from all interested parties will be submitted in PDF electronic format to the District Clerk at [mnrmp@ivgid.org](mailto:mnrmp@ivgid.org), and will be subject to the terms, conditions and scope of services herein stipulated and/or attached hereto.

Deadline for receipt of proposals is **April 10th, 2023**.

Confidentiality: All documents and other information submitted in response to this Request for Proposal are confidential and will not be disclosed until notice of intent to award the contract is issued.

## ARTICLE 1 PROJECT OVERVIEW

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### A. PROJECT DESCRIPTION

The Incline Village General Improvement District Board of Trustees is seeking proposals for the initial phase of a two-phase project. This initial phase will involve reviewing and analyzing the current scope, adequacy, and viability of a number of current policies, documents and systems identified in the Scope of Work, including the District's Strategic Plan and organizational and staffing structure. The initial phase will also include formulating recommendations for the potential second phase of the project, which will be contracted for separately and will involve all facets of change implementation associated with the recommendations obtained through the first phase. Should an interested firm not have the ability to deliver on all aspects of the Scope of Work, the Board of Trustees will consider partial responses.

The Board of Trustees will be reviewing all responses and will select their preferred vendor(s) for all or portions of the defined Scope of Work. Submitted proposals should provide cost estimates by enumerated subjects identified in the Scope of Work.

### B. PROJECT SCHEDULE

All proposals are to include project start and completion dates for each of the identified Scope of Work items.

### C. PERSONNEL

The firm's personnel shall be qualified and trained to accomplish the work in a professional manner and in compliance with all applicable federal, state and local requirements. This includes, but is not limited to:

- Demonstrated experience reviewing and analyzing foundational public agency documents
- Understanding of applicable state and local laws, regulations, and policies
- Demonstrated experience reviewing and identifying potential concerns with financial and software systems

### D. EQUIPMENT

The firm shall provide all materials and equipment necessary to accomplish the Work.

### E. INSURANCE REQUIREMENTS

**Commercial Insurance:** Contractor shall procure and maintain for the duration of the contract, insurance against claims for injuries to persons or damages to property, which may arise from or in connection with the performance of the work hereunder by the Contractor, his/her agents, representatives, employees, or subcontractors. Contractor shall purchase General Liability, Professional Liability, Workers' Compensation, and Professional Liability Insurance.

**General Liability:** Contractor shall purchase General Liability coverage with a minimum of \$2,000,000 combined single limit per occurrence, \$4,000,000 aggregate for bodily injury, personal injury and property damage. Contractor shall have a Certificate of Insurance issued to the INCLINE VILLAGE GENERAL IMPROVEMENT DISTRICT naming it as additional insured, and indicating coverage types, amounts and duration of the policy.

**Professional Liability/Errors and Omissions:** Consultant shall procure and maintain, and require its sub-consultants to procure and maintain, for a period of five (5) years following completion of the Services, professional liability/errors and omissions liability insurance appropriate to their profession. Such insurance shall be in an amount not less than \$2,000,000 per claim, and shall be endorsed to include contractual liability. "Covered Professional Services" as designated in the Professional Liability/Errors and Omissions policy must specifically include work performed under this Agreement.

**Workman's Compensation:** It is understood and agreed that there shall be no Industrial Insurance coverage provided for the Contractor or any Subcontractor by the District; and in view of NRS 616.280 and 617.210 requiring that Contractor comply with the provisions of Chapters 616 and 617 of NRS, Contractor shall, before commencing work under the provisions of this Agreement, furnish to the District a Certificate of Insurance from an admitted insurance company in the State of Nevada.

**Notice of Change/Non-Renewal:** All certificates of insurance required under this section E. shall provide for a minimum written notice of thirty (30) days to be provided to District in the event of material change, termination or non-renewal by either Contractor or carrier.

**F. LICENSES**

Consultant shall have a Washoe County business license if applicable, and all appropriate Contractor's licenses and certifications for the services to be performed.

**G. STAFFING PLAN AND STAFF QUALIFICATIONS**

The firm shall provide a staffing plan identifying total number of consultants and the number of each category of consultants who will be assigned to complete the Work; names of key individuals, number of years' experience and specific responsibilities; and job descriptions for each category of each person who will be performing the work.

**H. SIMILAR ENGAGEMENTS**

Submitted proposals must include examples of similar engagements and the results delivered.

**ARTICLE 2 PROPOSAL SUBMITTAL REQUIREMENTS**

Please submit an electronic (PDF) written proposal to [mnrff@ivgid.org](mailto:mnrff@ivgid.org), with the subject line "RFP – Management Consulting," by the Proposal Submission Deadline that addresses the following matters. Proposers must provide the following information in the order listed below. Please respond to each section on a separate page, in the order listed. Use this Article 2 as a checklist to be sure all information is included. **PROPOSALS NOT RECEIVED IN THIS FORMAT MAY BE CONSIDERED NON-RESPONSIVE.**

Submission of a Proposal shall be deemed a representation that the proposer:

1. Has carefully read and fully understands the information provided by IVGID as part of this RFP, including all Exhibits;
2. Represents that all information submitted is true and correct;

3. Did not, in any way, collude, conspire to agree, directly or indirectly, with any person, firm, corporation or other firm regarding the amount, terms or conditions of its Proposal; and
4. Acknowledges that IVGID has the right to make any inquiry it deems appropriate to substantiate or supplement information as necessary.

**□ A – COVER LETTER**

Include a cover letter with a summary of the firm's experience and capability in management and software consulting and service delivery related to the Scope of Work identified. Include the founding date of your organization, parent/subsidiary/affiliation relationship with other firms, types of services provided and the number of years your firm has been in business. Detail any exclusions to the Scope of Work.

**□ B – COMPANY BACKGROUND AND ORGANIZATION**

Include your firm's complete:

1. Name
2. Address
3. Contact person
4. Phone number
5. Email
6. Website address
7. Provide company's mission statement, values, and ethical standards
8. Describe your company's major lines of business
9. What differentiates your services/company from other companies offering similar services?
10. Identify any litigation pending or threatened against your company as of the submission date

**□ C – EXPERIENCE**

1. Number of years in management and software consulting and implementation
2. Referrals – List of similar Project-related clients, including:
  - a. Service provided
  - b. Client organization
  - c. Scale of project (e.g. project \$ amount, location, size, duration)
  - d. Contact name and number
3. Special Considerations
4. Describe any attribute of your firm that would enhance this proposal

**□ D – STAFFING PLAN**

1. Number of staff assigned to the work, by category
2. Job descriptions of staff, by category
3. Staff qualifications
  - a. Education/relevant experience (type and number of years) of key employees
  - b. Training of each employee or category of employee
    - i. Scope, frequency, employees covered, training, organization
4. Proposed staffing and project schedule

**□ E – FINANCIAL DATA**

Provide a copy of your most recent audited Financial Statement

□ **F – PROJECT COST AND SCHEDULE**

The proposal must contain the cost estimate for each item listed in the Scope of Work and the estimated timeline for completion of the required analysis, recommendations and formulation of the cost and timeline estimate for the potential implementation of the recommendations.

**ARTICLE 3 EVALUATION AND AWARD**

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- A. **Proposal Evaluation:** Per NRS 332 and IVGID's Purchasing Policy for Goods and Services, IVGID is not required to select the lowest priced offer, but may look at all factors concerning an offer, including, but not limited to, whether the proposal has:
1. the appropriate financial, materials, equipment, facility, personnel resources and expertise available, or the ability to obtain these as necessary to indicate the capability to meet all contractual requirements;
  2. demonstrated a thorough and accurate response to each requested item;
  3. a satisfactory record of performance, including a demonstrated history of successfully completing projects of a similar type, meeting delivery deadlines, and experience with similar work;
  4. any requested exceptions to IVGID's standard professional services agreement (Exhibit G);
  5. a satisfactory record of customer service;
  6. a satisfactory record of integrity;
  7. the legal authority to contract with IVGID; and
  8. any other factors IVGID deems relevant.
- B. IVGID reserves the right not to contract with any person submitting a bid in response to this Request for Proposal. If IVGID decides to contract, it will do so with the proposer whose responses best meet its needs, consistent with the selection process set forth herein. This Request for Proposal shall not be binding on IVGID until such time as a formal written contract and related documents have been approved by IVGID and fully executed by the parties.
- C. The Board of Trustees shall evaluate, interview, and select the firm(s) it determines to be best suited for this engagement. Evaluation of a response does not constitute a commitment by IVGID to acquire such services from any source. IVGID is not obligated in any way to proceed with this RFP or consider or enter into any agreement or undertake any liability to any firm in connection with this RFP, and any and all responses, whether qualified or not, may be rejected without any liability whatsoever to any firm on the part of IVGID. IVGID shall not be responsible for any costs incurred by a firm to prepare, submit, negotiate, contract or otherwise participate in this RFP process.
- D. IVGID further reserves the right to:
1. Make a selection based on its sole discretion;
  2. Reject any and all proposals;
  3. Issue subsequent solicitations;
  4. Postpone any of the time periods set forth in this RFP, for its own convenience;
  5. Remedy technical errors in the RFP;
  6. Approve or disapprove the use of particular subconsultants;

7. Negotiate with any, all, multiple or none of the Proposers that respond;
8. Negotiate a final project scope that includes all, just a portion, or related additional items relative to the proposed Scope of Work set forth in this RFP;
9. Waive informalities and irregularities in this RFP;
10. Utilize others to perform or supply work of the type contemplated by this RFP;
11. Request proposals from others with or without requesting proposals from contractors for the work of the type contemplated by this RFP; and/or
12. Enter into an agreement with another firm or re-solicit this project in the event the originally selected firm defaults or fails to execute an agreement with IVGID.

**ARTICLE 4                    FIRM SELECTION SCHEDULE; QUESTIONS REGARDING RFP; ADDENDA**

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The following dates are tentative and subject to revision by the District:

RFP for Services Advertised .....	March 23, 2023
RFP - Last Day for Questions .....	April 10th, 2023, 5 pm
Proposals Due .....	April 17th, 2023, 5 pm
Negotiations completed and selection of Consultant .....	April 26th, 2023
Award of Project – IVGID Board of Trustees Meeting.....	April 27th, 2023

For questions regarding this RFP, please contact: [Schmitz\\_Trustee@ivgid.org](mailto:Schmitz_Trustee@ivgid.org), with the subject line clearly marked “RFP – Management Consulting.” Questions must be received no later than the deadline set forth above. IVGID does not guarantee that it will provide answers to questions submitted after that deadline, but will make reasonable efforts to do so.

In the event it becomes necessary to revise any part of this RFP, IVGID will issue written addenda. Any amendment to this RFP is only valid if it is in writing and issued by IVGID. No oral interpretations or answers will bind IVGID. All addenda issued by IVGID will become part of this RFP.

No proposals will be accepted after the proposal due date listed above.

**ARTICLE 5                    SELECTION PROCESS, EVALUATION AND SELECTION CRITERIA**

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The firm(s) selection process will be conducted in accordance with all requirements stipulated in NRS Chapter 332 and IVGID Board Policy 20.1.0, Purchasing Policy for Goods and Services. All responsive Proposals received will be reviewed and evaluated by the Board of Trustees.

A short-list of firms will be determined based on qualifications and the completeness of the Proposal. The Board of Trustees may elect to conduct interviews prior to the final selection of a firm or firms. By submitting a Proposal, the proposer acknowledges that the IVGID Board of Trustees has sole and absolute discretion in the evaluation and the selection of one or more firms for this project.

**ARTICLE 6                    WITHDRAWAL OF PROPOSAL**

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The firm’s authorized representative may, prior to the date and time set as the deadline for receipt of the Proposals, modify or withdraw a response by contacting the District’s contact shown above via email and phone. A modification or withdrawal received prior to the deadline for proposal receipt shall be considered timely.

## **ARTICLE 7            DISQUALIFICATION OF PROPOSALS**

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Firms may be disqualified and Proposals may be rejected for any of, but not limited to, the following causes:

1. Lack of signature by an authorized representative on the Proposal
2. Failure to properly and/or accurately complete the Proposal
3. Evidence of collusion

IVGID reserves the right to waive any minor informality or irregularity, or to request clarification of such minor informalities or irregularities from any or all firms.

## **ARTICLE 8            CONFLICT OF INTEREST**

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No employee, officer, or agent of IVGID shall participate in the selection, or in the award or administration, of the Agreement if a conflict of interest, real or apparent, would be involved. Such a conflict would arise when one of the following has a financial or other interest in any firm proposing on or selected for the award:

1. The employee, or an officer or agent of the employee
2. Any member of the employee's immediate family
3. The employee's business partner
4. An organization which employs, or is about to employ, any of the above

IVGID's officers, employees, and agents shall neither solicit nor accept gratuities, favors, or anything of monetary value from prospective firms. Prior to entering into the Consulting Services Agreement, the firm is required to inform IVGID of any real or apparent organizational conflict of interest.

## **RFP EXHIBITS**

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Exhibit A – Scope of Work

Exhibit B – Scope of Work item 1 Strategic Plan materials to be found here:

[https://www.yourtahoepace.com/uploads/pdf-ivgid/District\\_Strategic\\_Plan\\_-\\_FINAL.pdf](https://www.yourtahoepace.com/uploads/pdf-ivgid/District_Strategic_Plan_-_FINAL.pdf)

Exhibit C – Scope of Work item 2 materials

1. DRAFT – Accounting and Finance Manual
2. DRAFT – Purchasing Policies and Procedures
3. Management Partners scope of services

Exhibit D – Scope of Work item 3 materials

1. IVGID Point of Sale Software Structure dated 3-14-2023
2. Tyler Munis training document
3. Tyler Munis Statement of Work

Exhibit E – Scope of Work item 4 materials

1. Job Descriptions for Senior Management
2. Current Organizational Chart
3. Raftelis Report

Exhibit F – Scope of Work item 5 materials to be found here:

<https://www.yourtahoeplace.com/ivgid/resources/board-policies-practices>

<https://www.yourtahoeplace.com/ivgid/resources/district-policy-procedure-resolutions>

Exhibit G – Standard IVGID Services Agreement Example



**EXHIBIT A**  
**Scope of Work**

The Incline Village General Improvement District Board of Trustees is seeking proposals for the initial phase of a two-phase project. This initial phase will involve reviewing and analyzing the current scope, adequacy, and viability of a number of current policies and documents identified in the Scope of Work, including the District's Strategic Plan and financial and software systems. The initial phase will also include formulating recommendations for the potential second phase of the project, which will be contracted for separately and will involve all facets of change implementation associated with the recommendations obtained through the first phase. Should an interested firm not have the ability to deliver on all aspects of the Scope of Work, the Board of Trustees will consider partial responses.

In the first phase, the firm will be asked to provide deliverables, in the form of written reports, that include recommendations for changes and methods of implementation for each of the below-identified areas. These recommendations must include discussion of how they will provide a cost-benefit, level of service, or operational or compliance improvement to the District. The deliverables must also include detailed scopes of work for subsequent change implementation procedures, including cost estimates and project implementation plans. The areas to be covered by these deliverables are:

1. **Strategic Plan** - Review with the BOT and senior management the existing strategic plan and formulate recommendations for improvements. The existing strategic plan may be found by using the link provided below:  
[https://www.yourtahoeplace.com/uploads/pdf-ivgid/District\\_Strategic\\_Plan\\_-\\_FINAL.pdf](https://www.yourtahoeplace.com/uploads/pdf-ivgid/District_Strategic_Plan_-_FINAL.pdf)
2. **Internal Controls** –Review the financial operational procedures and formulate recommendations for improvements. The existing internal financial procedures are included in Exhibit C.
3. **Financial and Software System(s)** - Review the status of the Tyler Munis software conversion, review the point-of-sale systems, the system for maintaining the Recreation Cards, and system used to scan and verify Recreation Cards. The firm is to analyze the current situation, formulate plans and recommendations for completing the Tyler Munis system implementation to meet the District's needs and assess the other systems utilized by the District for potential consolidation and/or system improvements. The systems are outlined in the attached Exhibit D.
4. **Organizational and Staffing Structure** – Review the District's organizational structure and the current responsibilities and job descriptions of the Senior

Management Team. Formulate recommendations including refinement of the senior management job descriptions and responsibilities. The organizational chart and existing senior management job descriptions are contained in Exhibit E.

5. **Policies** – Review current Resolutions and Board policies and document their compliance. All Resolutions and Board policies may be found at the links below:

<https://www.yourtahoepalce.com/ivgid/resources/board-policies-practices>

<https://www.yourtahoepalce.com/ivgid/resources/district-policy-procedure-resolutions>

In addition to the final deliverables, the consulting firm will also be responsible for reporting to the Board of Trustees' appointed liaison by providing a written weekly status report of the project, including potential additional needs for materials and/or staff time.

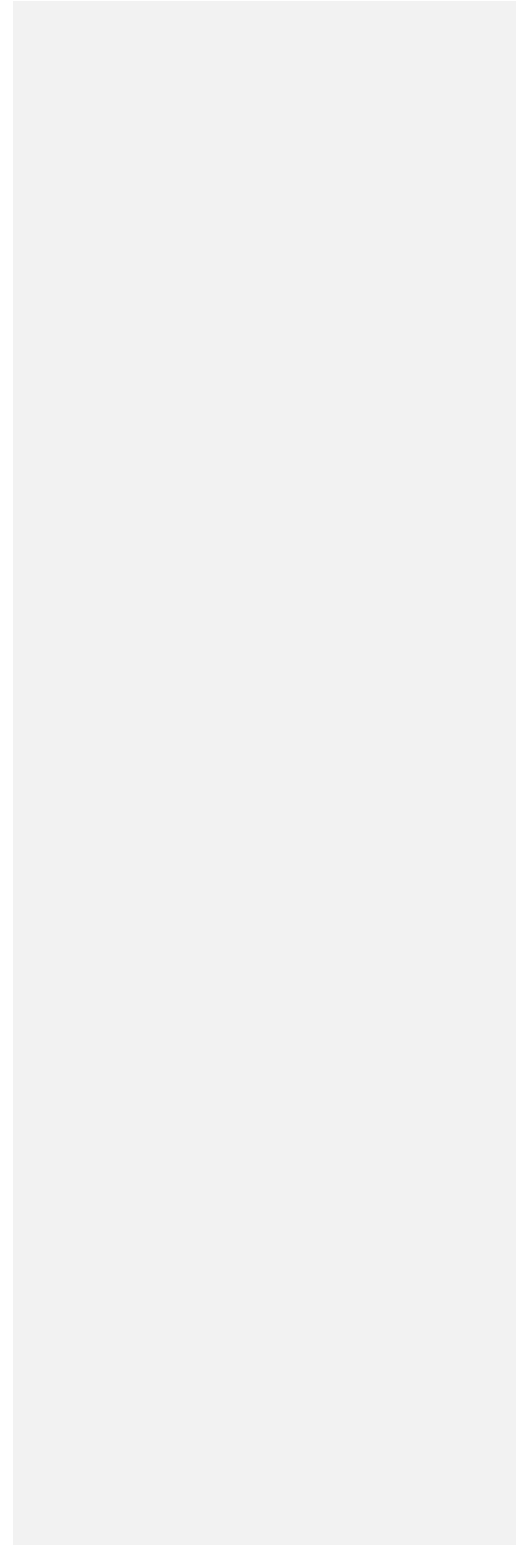
#### **Management Engagement Objectives**

- Identify specific opportunities for improvement for each of the listed areas.
- Identify opportunities to improve overall performance, including operational efficiency and productivity, organizational effectiveness, and cost savings.
- Develop recommendations and action plan for implementing changes necessary to achieve performance improvements as phase 2 potential projects.
- Develop qualitative and quantified benefit analyses and other applicable guidance for the implementation of improvement opportunities and recommendations.
- Provide a written report that meets the scope and objectives, including factual findings, conclusions, and recommendations for the phase 2 implementation projects including proposed costs and benefits for each potential implementation project.

**EXHIBIT B**

**Scope of Work Item 1 Strategic Plan**

[https://www.yourtahoepace.com/uploads/pdf-ivgid/District\\_Strategic\\_Plan\\_-\\_FINAL.pdf](https://www.yourtahoepace.com/uploads/pdf-ivgid/District_Strategic_Plan_-_FINAL.pdf)

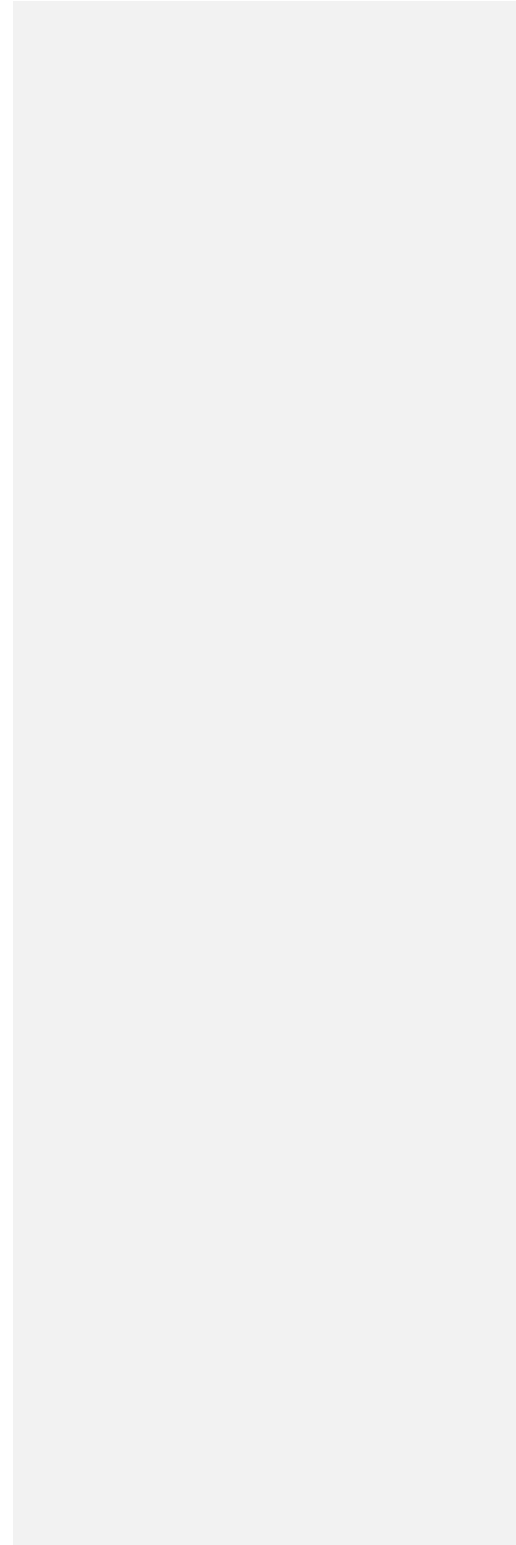


## **EXHIBIT C**

### **Scope of Work Item 2 Internal Controls**

Accounting and Finance Manual

Purchasing Policies and Procedures

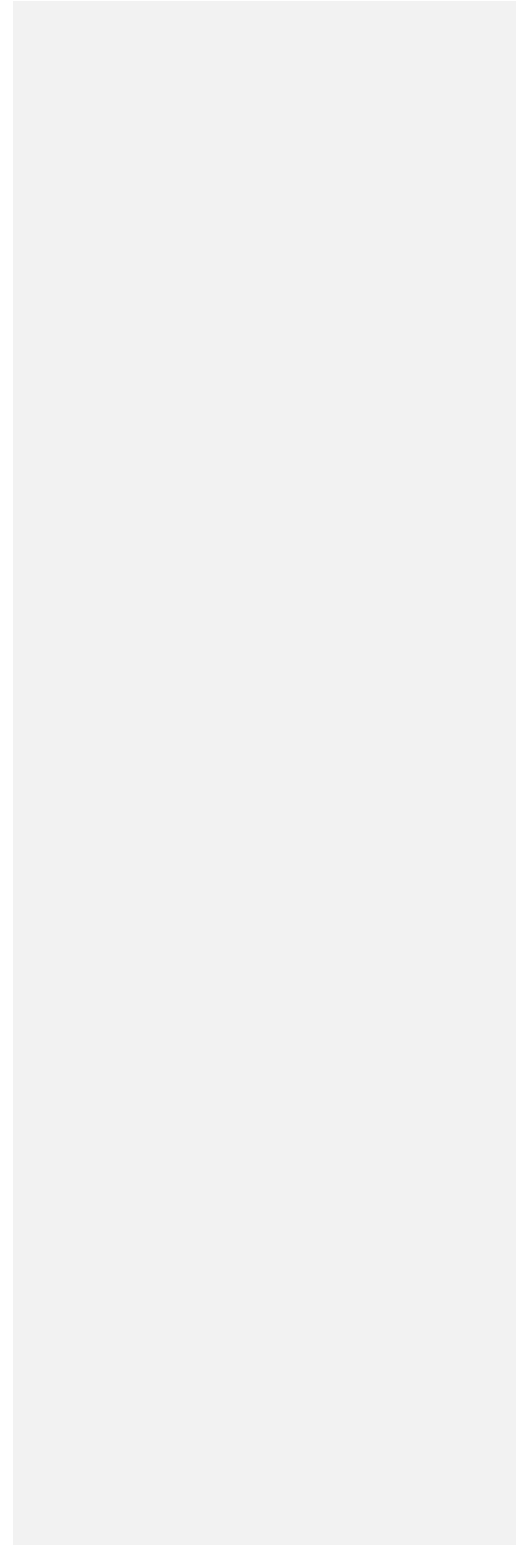


## **EXHIBIT D**

### **Scope of Work Item 3 Materials**

IVGID Point of Sale Software Structure

Tyler Munis training document  
Tyler Munis Statement of Work



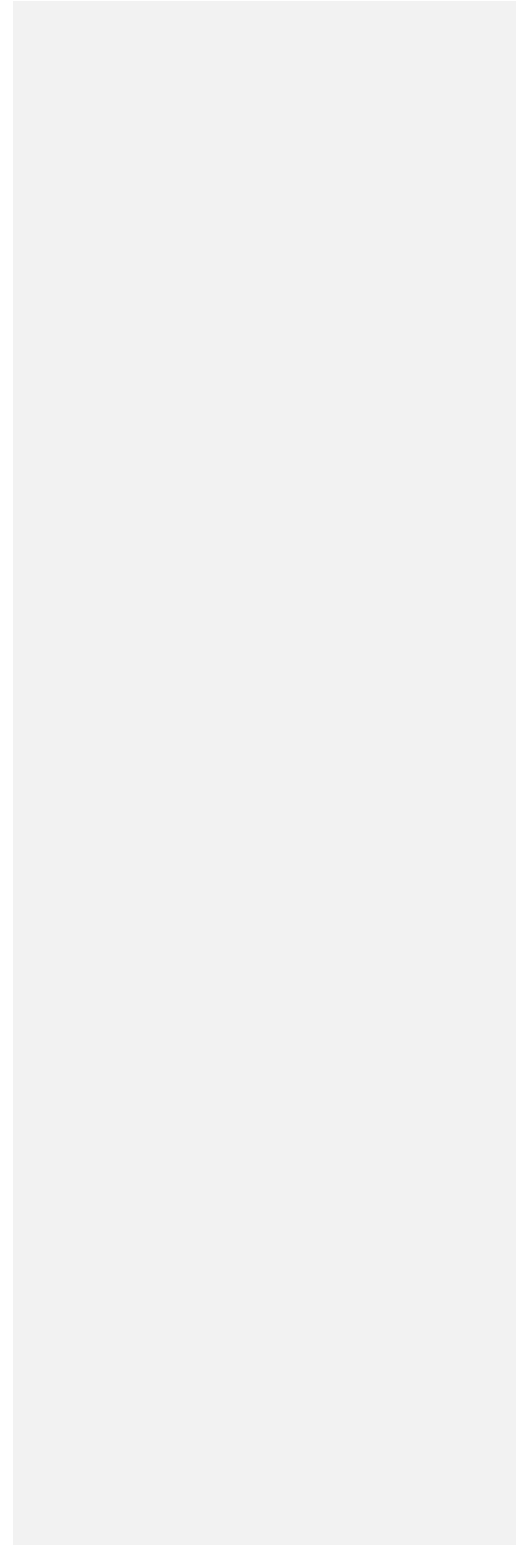
**EXHIBIT E**

**Scope of Work Item 4 Materials**

Job Descriptions for Senior Management

Organizational Chart

Raftelis Report

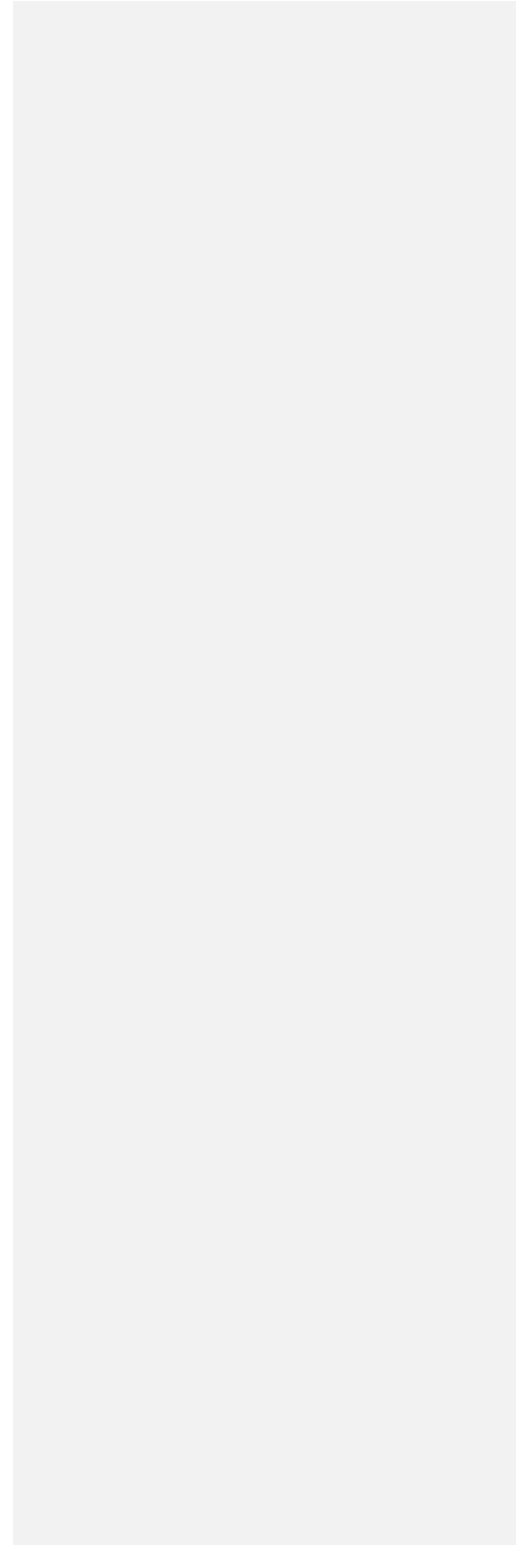


**EXHIBIT F**

**Scope of Work Item 5 Materials**

<https://www.yourtahoeplace.com/ivgid/resources/board-policies-practices>

<https://www.yourtahoeplace.com/ivgid/resources/district-policy-procedure-resolutions>



**EXHIBIT G**  
**STANDARD SERVICES AGREEMENT EXAMPLE**

