



**REQUEST FOR QUALIFICATIONS (RFQ)**

**FOR**

**WHITE MOUNTAIN LAKES COUNTY RECREATION  
IMPROVEMENT DISTRICT**

**MANAGEMENT CONSULTANT**

**WHITE MOUNTAIN LAKES, ARIZONA**

**Contract Number #2023-001**

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WMLCRID NOTICE OF REQUEST FOR QUALIFICATIONS  
#2023-001 Management Consultant

Notice is hereby given that WMLCRID is requesting qualifications (RFQ) for a firm to provide consultation, administration and operational management of the White Mountain Lakes County Recreation Improvement District.

The Request for Qualifications (RFQ) is available at 2015 Silver Creek Drive, Show Low AZ 85901, (928) 532-8099, or online at <https://www.wmlcrid.org/wmlcrid-about-us/procurement>.

RFQ from firms or teams must be submitted in a sealed envelope. The RFQ number and the respondent's name and address should be clearly indicated on the outside of the envelope, to be delivered to the Clerk of the Board of Directors at the White Mountain Lakes County Recreation Improvement District, 2015 Silver Creek Drive, Show Low, AZ 85901 on or before **Monday, April 17 2023 at 2:00 PM local Arizona time**. The original RFQ and four copies (five total) must be submitted. Additionally, an electronic copy in PDF format (on compact disk or USB flash drive) must be submitted. All RFQ submittals will be opened and publicly verified at that time.

RFQ's will be evaluated by the selection committee based on the criteria set forth in the RFQ and the selection committee will make a recommendation to contract with the highest ranked firm or team.

WMLCRID reserves the right to reject any or all RFQ or waive any informality in any RFQ. No respondent may withdraw its RFQ for ninety days after the date set for the opening thereof. WMLCRID reserves the right to cancel the RFQ at any time.

Any questions about this RFQ are to be submitted in writing via email to email addresses listed below. Once all questions are received by the date listed below, the answers will be provided in writing on the website by the dates listed below.

**CONTRACT NUMBER:** #2023-001  
**WRITTEN QUESTIONS DUE:** 4/10, 2023  
**ANSWERS ON WEBSITE:** 4/10, 2023  
**BID DUE DATE:** 4/17, 2023 AT 2:00 P.M. LOCAL AZ TIME  
**BID OPENING DATE:** 4/18, 2023  
**SUBMITTAL LOCATION:** 2015 Silver Creek Dr, Show Low, AZ 85901

**DIRECT WRITTEN QUESTIONS TO:**

**CHAIRMAN OF THE BOARD**  
[chairman@wmlcrid.org](mailto:chairman@wmlcrid.org)

**TREASURER OF THE BOARD**  
[treasurer@wmlcrid.org](mailto:treasurer@wmlcrid.org)

Published in the Holbrook Tribune News & the White Mountain Independent & on District Website

## **SECTION I - PROJECT DESCRIPTION AND SCOPE**

Provide management consulting and operations of the White Mountain Lakes County Recreation Improvement District.

Scope of Services Required:

- Develop annual operating plan and budget
- Maintain facilities – provide light labor for maintaining the grounds, signs and equipment
- Patrol lake and surrounding areas to ensure order, safety conditions, and visitor compliance with lake rules and regulations and boating laws
- Maintain a variety of records including daily boat count usage & swim/picnic lake usage
- Answers inquiries from District members and the public
- Administers guest pass program
- Administers daily patrol activity
- Develops and maintains current membership databases, lists, and forms
- Manages District Finances and submits billings to District for payment
- Communicates with the Clerk of the Board of Directors as needed regarding billing, etc.
- Assists in managing the District's website
- Responds to all Public Records Requests
- Recruit, train and manage employees
- Prepare and maintain accurate records and prepare reports as required
- Report to the Board of Directors on a per-meeting basis

### **Background**

The White Mountain Lakes County Recreation Improvement District was formed on February 8, 1993 to manage and improve the recreational use of White Mountain Lake and Mexican Lake through a current agreement with the Silver Creek Irrigation District.

## **SECTION II – EVALUATION CRITERIA**

The Consultant team will be selected through the two-step qualifications-based selection process, as described in ARS § 41-2538. Firms interested in providing Consulting services for this project must submit a RFQ that addresses the following issues:

- A. Information, Experience and Qualifications of the firm or team.
1. Identify firm owner, partners or members.
  2. Identify period of time Consultant firm has been operating in business offering similar consulting and management services.
  3. Identify two recent (within the past three years) comparable operations which the firm or team has successfully managed.
  4. **For each project listed above (#3),** provide:
    - a. Description of the operation,
    - b. the role of the firm or team member,
    - c. the dates of engagement and types of services performed,
    - d. the name of the owner, and
    - e. Reference information (current names, telephone numbers & email) for those who were supervising your work as stated in Item #3.

- B. Understanding of the operation and services and ability to the required services.
  - 1. Describe your team's organization and management capability. Briefly describe systems to be used and team experience in managing of similar operation.
  - 2. Completeness of Proposal
- C. Experience and Resource Availability of key personnel assigned to the operations.
  - 1. For each key person identified, provide a short resume of the person's professional qualifications and experience. Length of service with your firm.
  - 2. Provide at least two references for each key person.
  - 3. List any proposed sub-consultants, their qualifications and their role.
- D. Overall evaluation of the firm or team and its perceived ability to provide the required services.

This is to be determined by the selection committee members. No submittal response is required.

### **SECTION III –CONSULTANT QUESTIONNAIRE**

The complete Statement of Qualifications submittal will answer the following questions:

- 1. How many years has your firm been in the management consulting and operations business in the State of Arizona?
- 2. Describe your firm's experience with the operation of recreation districts and the areas of responsibilities your firm was responsible for managing.
- 3. Describe your firm's ability to implement and a timeline to assume operational duties; identify what you would consider key milestones.
- 4. Describe your account services team. What services do they provide? What differentiates your team from your competitors' teams? What minimum training and certification do your team members possess? How do they communicate with employees and conduct open enrollment? How do they resolve claims disputes?
- 5. Provide any other information that makes your firm uniquely qualified to serve as the White Mountain Lakes County Recreation Improvement District management consultant.

## **SECTION IV – SUBMITTAL REQUIREMENTS**

Firms interested in the **White Mountain Lakes County Recreation Improvement District Management Consultant** must submit a RFQ which includes a one page cover letter, plus a maximum of twenty pages of response to address the RFQ criteria and questionnaire (excluding resumes, but including an organization chart). Resumes for each key team member shall be limited to a maximum length of two pages and should be included in an appendix at the end of the RFQ. **Please submit the original RFQ plus four copies (five total) and electronic copy by 2:00 PM, Monday, April 17, 2023.**

All submittals shall be sent or delivered to:

**Chairman & Treasurer of the Board  
WMLCRID  
2015 Silver Creek Drive  
Show Low, AZ 85901**

Please be advised that failure to comply with the following criteria may be grounds for disqualification and will be strictly enforced:

- Receipt of the RFQ by the specified time and date.
- The correct number of copies including the electronic copy of the submittal.
- Deposit of the submittal in the correct location.

All information in the RFQ shall be machine printed for legibility. Only signatures are to be handwritten. RFQ found to be illegible in the judgment of WMLCRID will be rejected.

WMLCRID reserves the right to reject any RFQ not properly signed. All RFQ marked as original shall include a transmittal letter signed by an authorized representative of the respondent in ink.

### Fees and Pricing

Do not include any fees or pricing related to the project with the RFQ.

### Integrity of RFQ

By submitting an RFQ, the respondent affirms:

- That it has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with the submitted RFQ.
- The submission of the RFQ did not involve collusive or other anti-competitive practices.
- The respondent shall not discriminate against any employee or application for employment in violation of any and all applicable law.

### Mistake in RFQ

A respondent may withdraw the RFQ or correct any mistake by modifying the RFQ prior to the time and date set for receipt.

### Rejection

WMLCRID reserves the right to reject any or all RFQ or any part thereof, or accept any RFQ or any part thereof, and to waive or decline to waive any formality or informality in a RFQ as deemed to be in the best interest of WMLCRID. WMLCRID expressly reserves the right to reject any or all RFQ or reissue the RFQ.

### Return of Documents

Any documents submitted in response to the RFQ become the property of WMLCRID and will not be returned.

### Disclosure of Data

RFQ will not be open for public inspection until a binding contract is executed with a respondent and all other respondents have been so notified.

RFQ may contain confidential or proprietary data that the respondent does not wish disclosed for any purpose other than evaluation of the RFQ. If so, the respondent shall clearly identify the specific pages of the RFQ to be restricted. WMLCRID assumes no liability for disclosure or use of unmarked data, or for the disclosure of marked data if that disclosure is required by law. Unless confidentiality is requested, information submitted in response to the RFQ may be disclosed in response to a request for inspection of public records submitted pursuant to applicable Arizona Revised Statutes.

### Protest Policy

- A. Right to Protest. Any actual or prospective bidder, respondent, offeror or contractor who is aggrieved in connection with the solicitation or award of a contract shall initially protest to the Procurement Manager.
- B. Resolution of Protests. The Procurement Manager issuing the solicitation shall have authority to resolve protests. Appeals from the decisions of the Procurement Manager may be made to the Board of Directors.
- C. Filing of a Protest
  1. Content of Protest: The protest shall be in writing and shall include the following information:
    - a. The name, address and telephone number of the protestant;
    - b. The signature of the protestant or its representative;
    - c. Identification of the solicitation or contract number;

- d. A detailed statement of the legal and factual grounds of the protest including copies of relevant documents; and
- e. The form of relief requested.

B. Time for Filing Protests

1. Protests Concerning Improprieties in a Solicitation.
  - a. Protests based upon alleged improprieties in a solicitation that are apparent before the solicitation due date shall be filed not less than five (5) working days before the solicitation due date.
2. Protests shall be filed within ten (10) days after issuance of notification of award or issuance of notice of intent to award.
3. The Procurement Manager, without waiving the District's right to dismiss the protest for lack of timeliness, may consider any protest that is not filed timely.
4. The Procurement Manager shall give notice of the protest to the successful contractor if award has been made or, if no award has been made, to all interested parties. Interested parties have the right to intervene.
5. Stay of Procurements during the Protest. In the event of a timely protest, the District may proceed further with the solicitation or with the award of the contract unless the Procurement Manager makes a written determination that there is a reasonable probability that the protest will be sustained or that the stay of procurement is not contrary to the substantial interests of the District.
6. Confidential Information
  - a. Material submitted by a protestant shall not be withheld from any interested party except to the extent that the withholding of information is permitted or required by law.
  - b. If the protestant believes the protest contains material that should be withheld, a statement advising the Procurement Manager of this fact shall accompany the protest submission in accordance with.
7. Decision by the Procurement Manager
  - a. The Procurement Manager shall issue a written decision within fourteen (14) days after a protest has been filed. The decision shall contain an explanation of the basis of the decision.
  - b. The Procurement Manager shall furnish a copy of the decision to the protestant, by certified mail, return receipt requested, or by any other method including facsimile or electronically, that provides evidence of receipt.



- c. The time limit for decisions may be extended by the Procurement Manager for a reasonable time not to exceed thirty (30) days. The Procurement Manager shall notify the protestant in writing that the time for the issuance of a decision has been extended, and the date by which a decision will be issued.
- d. If the Procurement Manager fails to issue a decision within the time limits, the protestant may proceed as if the Procurement Manager had issued an adverse decision.

8. Remedies

- a. If the Procurement Manager sustains the protest in whole or part and determines that a solicitation, evaluation process, proposed contract award or contract award does not comply with this policy, the manager shall implement an appropriate remedy.
- b. In determining an appropriate remedy, the Procurement Manager shall consider all the circumstances surrounding the procurement or proposed procurement including, but not limited to, the seriousness of the procurement deficiency, the degree of prejudice to other interested parties or to the integrity of the procurement system, the good faith of the parties, the extent of performance, costs to the District, the urgency of the procurement and the impact of the relief on the using agency's mission.
- c. An appropriate remedy may include one or more of the following:
- d. Decline to exercise an option to renew under the contract;
- e. Reject all bids, responses or proposals;
- f. Terminate the contract;
- g. Reissue the solicitation;
- h. Issue a new solicitation;
- i. Award a contract consistent with the procurement code; or
- j. Such other relief as is determined necessary to ensure compliance with this policy.

9. Appeals to the Board of Directors (BOD)

- a. An appeal from a decision entered or deemed to be entered by the Procurement Manager shall be filed with the Clerk of the BOD within seven days from the date the decision is issued. The appellant shall also file a copy of the appeal with the Procurement Manager.
- b. Content of Appeal. The appeal shall contain:

1. Content of the protest;
  2. A copy of the decision of the Procurement Manager; and
  3. The precise factual or legal error in the decision of the Procurement Manager from which an appeal is taken.
10. Notice of Appeal
  - a. The Procurement Manager shall give notice of the appeal to the successful contractor if award has been made or, if no award has been made, to interested parties. Such interested parties shall have the right to request copies of the appeal and to intervene in the proceedings.
  - b. The Procurement Manager shall, upon request, furnish copies of the appeal to those interested parties.
11. Stay of Procurement during Appeal. If an appeal is filed during the procurement and before an award of a contract and the procurement or award of the contract was stayed by the Procurement Manager, the filing of an appeal shall automatically continue the stay unless the Procurement Manager makes a written determination that the procurement or award of the contract without delay is necessary to protect substantial interests of the District.
12. Procurement Manager Report. The Procurement Manager shall file a report on the appeal with the BOS within seven (7) days from the date the appeal is filed. At the same time, the Procurement Manager shall furnish a copy of the report to the appellant by certified mail, return receipt requested, and to any interested parties. The report shall contain copies of:
  - a. The appeal;
  - b. Any other documents that are relevant to the protest; and
  - c. A statement by the Procurement Manager setting forth findings, actions, recommendations and any additional evidence or information necessary to determine the validity of the appeal.
13. Extension for Filing of Report
  - a. The Procurement Manager may request in writing an extension of the time period setting forth the reason for extension.
  - b. The BOD's determination on the request shall be in writing, state the reasons for the determination and, if an extension is granted, set forth a new date for the submission of the report. The BOD shall notify the appellant in writing that the time for the submission of the report has been extended and the date by which the report will be submitted.
14. Comments on Report

- a. The appellant shall file comments on the Procurement Manager's report with the BOD within seven (7) days after receipt of the report. Copies of the comments shall be provided by the appellant to the Procurement Manager and all other interested parties. The comments must contain a statement or confirmation as to the appellant's requested form of relief.
  - b. The BOD may grant an extension on the time period to file comments pursuant to a written request made by the appellant within the period stating the reason an extension is necessary. The BOD's determination on the request shall be in writing, state the reasons for the determination and, if the extension is granted, set forth a new date for the filing of comments. The BOD shall notify the Procurement Manager of any extension.
15. Dismissal before Hearing
- a. The BOD shall dismiss, upon a written determination, an appeal before scheduling a hearing if:
    - 1. The appeal does not state a valid basis, including a detailed statement of the legal and factual grounds, for protest; or
    - 2. The appeal is untimely.
16. Remedies
- a. If the BOD sustains the appeal in whole or part and determines that a solicitation, evaluation process, proposed award, or award does not comply with this Code.

## **SECTION V – SELECTION PROCESS AND SCHEDULE**

WMLCRID will conduct a two-step qualifications-based selection process. A selection committee will evaluate each RFQ submitted according to the criteria set forth in Section III above. The selection committee will select a short list of no more than three firms or teams from the RFQ's received. If deemed necessary by the selection committee, each firm on the short list may be interviewed. WMLCRID will also perform a due diligence investigation of the firms and teams on the short list.

At the conclusion of the evaluation of RFQ, the interviews (if any), and the due diligence investigation, the selection committee will rank in order of preference the firms and teams on the short list. WMLCRID will enter into negotiations with the highest-ranked firm/team and execute a contract upon satisfactory negotiation of fees and contract terms. The firm/team selected will deliver the consulting services through a fixed fee contract for professional consulting, administration and brokerage services.

The following tentative schedule has been prepared for the project:

Written Questions Due: Friday, April 7  
Answers Provided on Website: April 10  
RFQ due: Monday, April 17, 2023 at or before 2:00 PM local Arizona time

Selection committee evaluation complete: April 24, 2023

Contract Recommendation to the Board of Directors: April 26, 2023.

If WMLCRID is unsuccessful in negotiating a contract with the highest-ranked firm/team, the District may negotiate with the second or third most qualified firm or may decide to terminate the selection process.

## **SECTION VI – INDEMNIFICATION AND INSURANCE REQUIREMENTS**

WMLCRID will require the selected firm or team to execute a professional service contract. Submission of your RFQ shall indicate your firm's ability and agreement to execute a contract and provide the required indemnification and insurance.

## **SECTION VII– RESERVATION OF RIGHTS BY WMLCRID**

WMLCRID expressly reserves the right to undertake any of the following if advantageous to the District:

- Reject any or all RFQ.
- Withhold the award for any reason it may determine.
- Terminate the RFQ process at any time.
- Reissue the RFQ.
- Extend the time frame for submission of the responses by notification to all parties who are known to have received a copy of the RFQ.
- Request more information from any or all submitting respondents.
- Hold all RFQ for a period of 60 days after the opening date and time and accept an RFQ not withdrawn before the scheduled date and time for receipt.
- Waive or decline to waive irregularities in any RFQ, or in the RFQ process.
- Decline to enter into a contract with any of the respondents.

## **SECTION VIII – GENERAL INFORMATION**

This RFQ will be advertised in the official District newspaper, the Holbrook Tribune News, and also in the White Mountain Independent. **All firms submitting an RFQ must refrain from influencing any member of the selection committee to protect the integrity of the selection process.** A non-collusion affidavit will be required from the successful respondent.

All cost for preparation, submission and/or delivery incurred by the respondent is the sole responsibility of the respondent and will not be paid by the District

Questions should be in writing and addressed to:

Chairman & Treasurer of the Board  
2015 Silver Creek Drive  
Show Low, Arizona 85901  
(928) 532-8099  
[chairman@wmlcrid.org](mailto:chairman@wmlcrid.org)

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Certification Regarding  
Debarment, Suspension, and Other Responsibility Matters  
Primary Covered Transactions

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This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 13 CFR Part 145. The regulations were published as Part VII of the May 26, 1988 *Federal Register* (pages 19160-19211). Copies of the regulations are available from local offices of the U.S. Small Business Administration.

**(BEFORE COMPLETING CERTIFICATION, READ INSTRUCTION ON NEXT PAGE)**

- (1) The prospective primary participant certifies to the best of its knowledge and belief that it and its principals:
- (a) Are not presently debarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
  - (b) Have not within a three-year period preceding this application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
  - (c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph (1)(b) of this certification; and
  - (d) Have not within a three-year period preceding this application had one or more public transactions (Federal, State, or local) terminated for cause or default.
- (2) Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective primary participant shall attach an explanation to this proposal.

Business Name \_\_\_\_\_

Date \_\_\_\_\_

By \_\_\_\_\_  
Name and Title of Authorized Representative

\_\_\_\_\_

Signature of Authorized Representative

SBA Form 1623 (10-88)

### **INSTRUCTIONS FOR CERTIFICATION**

1. By signing and submitting this proposal, the prospective primary participant is providing the certification set out below.
2. The inability of a person to provide the certification required below will not necessarily result in denial of participation in this covered transaction. The prospective participant shall submit an explanation of why it cannot provide the certification set out below. The certification or explanation will be considered in connection with the department or agency's determination whether to enter into this transaction. However, failure of the prospective primary participant to furnish a certification or an explanation shall disqualify such person from participation in this transaction.
3. The certification in this clause is a material representation of fact upon which reliance was placed when the department or agency determined to enter into this transaction. If it is later determined that the prospective primary participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the department or agency may terminate this transaction for cause or default.
4. The prospective primary participant shall provide immediate written notice to the department or agency to which this proposal is submitted if at any time the prospective primary participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
5. The terms "covered transaction," "debarred," "suspended," "ineligible," "lower tier covered transaction," "participant," "person," "primary covered transaction," "principal," "proposal," and "voluntarily excluded," as used in this clause, have the meanings set out in the Definitions and Coverage sections of the rules implementing Executive Order 12549. You may contact the department or agency to which this proposal is submitted for assistance in obtaining a copy of those regulations (13 CFR Part 145).
6. The prospective primary participant agrees by submitting this proposal that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency entering into this transaction.
7. The prospective primary participant further agrees by submitting this proposal that it will include the clause titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion—Lower Tier Covered Transactions," provided by the department or agency entering into this covered transaction, without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
8. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not debarred, suspended,

ineligible, or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the ineligibility of its principals. Each participant may, but is not required to, check the Nonprocurement List.

9. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
10. Except for transactions authorized under paragraph 6 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the department or agency may terminate this transaction for cause or default.

