Tahoe RCD 2026 Strategic Planning RFP Questions & Answers (11/9/2026)

1. Workshops and program sessions. May the stakeholder interviews and the six program strategy sessions be held virtually, with one or two on-site sessions in South Lake Tahoe for the Board and staff?
A – Ideally, we would like our strategy sessions to be in person. We value the team-building aspect of strategic planning and find we get more and better engagement when we are in the room together (in person).

2. References. The RFP asks for three references from similar public agencies. Will the District accept references from nonprofit and county-funded clients where the consultant led planning and funding strategy, if public-agency references are fewer than three?
A – Yes, this is acceptable.

3. Insurance. The sample agreement lists general liability, auto, workers' compensation, errors and omissions and pollution liability. For a planning and facilitation contract with no field work, will the District waive the pollution and auto requirements, and the workers' compensation requirement for a sole-member firm with no employees?
A – Tahoe RCD is willing to discuss reasonable adjustments to its standard contract terms with the selected vendor.

4. Does Tahoe RCD have an anticipated budget range for the strategic planning engagement?
A – Yes. This project is currently budgeted at $30,000

5. Does the District have expectations regarding in-person participation for the kickoff, program strategy sessions, stakeholder engagement, or Board presentations, or may some portions of the process be conducted virtually?
A – Some portions may be conducted virtually. Board presentations, updates/check-ins, and stakeholder engagement can be virtual. However, we do prefer in-person facilitation for program strategy sessions (see Q1, above).

6. The sample Professional Services Agreement includes Contractors Pollution Liability coverage of $5 million per loss and $10 million aggregate. Would that coverage requirement apply to this strategic planning engagement?
A – No

7. The sample agreement states that the consultant represents that it is “licensed in the State of California.” For this type of strategic planning consulting work, is Tahoe RCD requiring a specific California professional license or business registration?
A – No

8. The project timeline identifies the Draft Plan to Board date as April 7, 2027 and the Final Plan Adopted date as May 20, 2026. Should the latter date be May 20, 2027?
A – Yes, May 20, 2027 is the correct date. Apologies for the typo and confusion.

9. The timeline lists the Final Plan Adopted date as 5/20/2026. Should this read 5/20/2027?
A – Yes

10. Deliverable 5 calls for six individual program strategy sessions, while the Scope of Work names five programs (Forest Management, Fire Adapted Communities, Aquatic Invasive Species, Restoration, and Stormwater). Should we plan separate sessions for AIS Prevention and AIS Control, or is a different sixth session intended?
A – We just hired our first AIS Control Program Manager, so we are thinking this is a great opportunity to focus on AIS Control separately from the AIS Prevention program. However, we are flexible, and if the selected consultant has an alternative method, we are open to hearing it.

11. Deliverable 4 refers to findings across Sections 1–5, and the Scope of Work contains four sections. Is there a fifth area the situational analysis should cover?
A – Sorry for the confusion. There are only 4 sections.

12. Should the Tahoe Conservation Partnership and Tahoe Fire and Fuels Team, whose workloads are directed by partners outside the District, receive dedicated program sessions, or be addressed within the cross-program and partner coordination work?
A – This should be covered briefly in the cross-program and partner coordination work. These are important programs, but they are co-managed by Tahoe RCD and partner organizations.

13. Is there a budget range or not-to-exceed amount the District can share for this engagement?
A – This project is budgeted for $30,000

14. What evaluation criteria and weighting will the District use to score proposals?
A – A subcommittee will review proposals and select a consultant. Proposals will be scored by committee members based on the RFP criteria and the strength of the answers. The sub-committee will further analyze and rank proposals when it meets to discuss them. Proposals must demonstrate the organization's ability to complete the work, show an understanding of the Tahoe Basin, and include experience working with RCDs or equivalent.

15. The sample Professional Services Agreement requires Contractors Pollution Liability insurance ($5 million per loss, $10 million aggregate). Given that this engagement involves planning and facilitation only, would the District consider waiving that requirement?
A – Yes

16. The sample agreement references federal funding and an Exhibit D of federal requirements. Will this contract be federally funded, and if so, which funding source and requirements apply?
A – This project is not federally funded.

17. Does the District expect workshops and strategy sessions to be held in person in South Lake Tahoe, or would a mix of in-person and virtual sessions be acceptable?
A – A mix - See Questions 1 and 22

18. Would the District be able to share its 2021-2023 Strategic Plan and any progress reporting against it? This would help us scope the review of mission, vision, and values.
A – Yes

19. The sample Professional Services Agreement states that the consultant is licensed in the State of California. For a firm based outside California, what registration or licensing does the District require (for example, a California Secretary of State foreign-entity registration or a local business license), and must it be in place at proposal submission or at contract signing?
A – This is standard contract language and does not strictly apply to this project. We have no licensure requirements. If selected, we can discuss this further during contract negotiations.

20. For the three required references, would the District accept public agencies outside California, such as conservation districts in other states, or nonprofit conservation clients, if the strategic planning work is comparable?
A – YES

21. What is the status of the South Lake Tahoe Wildfire Prevention External Governance Structure Analysis, and will its findings be available to the strategic planning consultant?
A – This effort kicked off on October 5th and likely won't have findings available for this document.

22. Roughly how many stakeholder and partner interviews, surveys, or workshops does the District anticipate? Will the Board's ad hoc Strategic Plan committee serve as the steering group for this project?
A – The Board's ad hoc Strategic Plan committee will serve as the steering group for this project. Anticipated engagement of external partners is up to 12 interviews. Partner interviews can be remote and are not expected to be in person. We will not be doing any public outreach or surveys. One or two Tahoe RCD staff workshops (4-6 hours), one Board workshop (4-6 hours), and five or six program sessions (3-4 hours each). Again, we are flexible and open to methods or strategies consultants may suggest.

23. Will the consultant have access to program-level budgets, staffing, performance metrics, and grant histories for the situational analysis?
A – We will be able to get the selected consultant whatever they need.

24. For Scope Section 4 (Technology, Data & Operational Capacity), is the District seeking an assessment with recommendations, or should the deliverables also include draft policies such as AI acceptable-use or data governance guidelines?
A – Assessment and recommendations only

25. Should the final plan be produced as a designed public-facing document, an internal working document, or both? Are there accessibility requirements, such as Section 508 or WCAG, for the final deliverables?
A – Both. There is no accessibility requirement as a deliverable for this project.

26. References. The RFP asks for three references from similar public agencies for which the firm has provided strategic planning services within the last five years. Would the District also consider references from nonprofit boards and public-sector clients for whom we facilitated strategic planning or closely related work (stakeholder engagement, board and staff retreats, needs assessment)?
A – YES

27. Insurance. The sample Professional Services Agreement includes Contractors Pollution Liability ($5 million per loss / $10 million aggregate) and "any auto" automobile liability. Will those apply to a planning and facilitation contract, or will the insurance requirements be adjusted to the scope? Similarly, does the reference to being "licensed in the State of California" mean a local business license, or something more?
A – Tahoe RCD is willing to discuss reasonable adjustments to its standard contract terms with the selected vendor.

28. Budget. Is there a budget range or not-to-exceed amount the District has in mind for this engagement?
A – $30,000

29. In-person work. Does the District expect the six program strategy sessions and the Board presentations to be held in person in South Lake Tahoe, or is a mix of in-person and virtual sessions acceptable?
A – A mix. See questions See Questions 1 and 22

30. Funding. The sample agreement references federal funding and an Exhibit D of federal requirements. Will this contract be federally funded, and if so, which requirements apply?
A – This project is not federally funded.

31. Technology, data, and AI (Scope item 4). Is the District looking for an assessment with recommendations, or also for help putting policies or tools in place, such as an AI use policy for staff?
A – Assessment and recommendations

32. Timeline. The schedule lists "Final Plan Adopted 5/20/2026." I assume that means May 20, 2027. Could you confirm?
A – Yes, May 20, 2027 is correct.

33. Do you have a budget or a maximum budget in mind?
A – $30,000

34. For the Technology and Staffing assessments, how deep of an analysis are you looking for the consultant to provide?
A – Assessment and recommendations only

35. What data, if any, do you currently have available to help inform the analysis?
A – Not sure exactly what you are looking for here. However, we have the past strategic plan and other program data available.

36. Delivery format: May the program strategy sessions, stakeholder engagement, and Board draft/final presentations be conducted virtually, or does the District expect any of them to be held in person in South Lake Tahoe?
A – See questions 1, 22

37. References: The RFP asks for references from public agencies provided strategic planning services within the last five years. May a proposer also include nonprofit or education organizations for which it provided strategic or organizational planning services, where its public-agency planning work is more recent or in progress?
A – Yes

38. Insurance: The sample Professional Services Agreement (Section 3.2.10) includes contractors pollution liability coverage at $5 million per loss and $10 million total limits Does that requirement apply to this strategic planning engagement, which involves facilitation and planning services only, or can the insurance requirements be tailored to the scope of services at contracting?
A – Tahoe RCD is willing to discuss reasonable adjustments to its standard contract terms with the selected vendor.

39. Deliverable #4 references a “Situational analysis/needs assessment summarizing findings across Sections 1–5” however the Scope of Work lists only four sections. Can Tahoe RCD clarify whether the situational analysis should address only the four identified scope areas or whether an additional fifth area is intended?
A – Sorry for the confusion. There are only 4 sections.

40. The RFP identifies April 7, 2027, as the deadline for presenting the draft plan to the Board, but lists May 20, 2026, as the final plan adoption date. Can Tahoe RCD confirm whether the intended final adoption date is May 20, 2027?
A – Final adoption is May 20, 2027. Apologies for the typo and confusion.

41. Budget. The RFP asks for a fee proposal including standard billing rates but does not state a budget. Is there an approved budget range or not-to-exceed amount for this engagement?
A – this project has been budgeted at $30,000

42. In-person and virtual sessions. The scope includes six program strategy sessions, stakeholder and Board engagement, and Board presentations at the draft and final stages. Which of these does the District expect to be held in person in South Lake Tahoe, and which may be conducted virtually?
A – See questions 1 and 22

43. References. The RFP asks for three references from similar public agencies for strategic planning services provided within the last five years. Would references from nonprofit and foundation strategic planning engagements be acceptable where public agency references are limited?
A – Yes

44. Interviews. If finalist interviews are held on December 10 or 11, will they be in person or virtual?
A – If needed, we will hold interviews in whatever format works for the chosen consultants. In-person and virtual are acceptable. Depending on the hiring committee's direction, we may award the project without interviews.

45. Starting materials. Will the District share its current strategic plan, recent program data, and a stakeholder list with the selected consultant at kickoff?
A – Yes