Request for Proposals

City of Minneapolis
Human Resources

Management Assessment and Related Services

RFP 2016-71 Issue Date: May 2, 2016

Proposals due by: Thursday, June 2, 2016 at 4:00 p.m.

Minneapolis
City of Lakes

Human Resources
250 S. Fourth St. - Room 100
Minneapolis, MN 55415
TEL 612.673.3982
www.minneapolismn.gov

May 2, 2016

To whom it may concern:

Attached is a Request for Proposal (RFP) for Professional Services to assist in the assessment, selection and development of candidates for Department Head positions and for other executive, managerial and leadership positions. The City utilizes the results of management assessments to evaluate the candidate's knowledge, skills and abilities to perform the responsibilities associated with the position they are being considered. Assessment results are also used to develop professional development plans for candidates who are ultimately selected and hired by the City. Follow-up coaching services may also be requested and utilized by the City.

Please consider submitting a proposal for providing these services if your firm meets the qualifications and is available. Please review the RFP for details.

Proposals are due by June 2, 2016.

Thank you for your consideration.

Sincerely,

Patience Ferguson
City of Minneapolis
Human Resources Department

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Request for Proposals
for
Management Assessment Services

I. **INVITATION:** It is the intention of the City to solicit proposals for management assessment services. Over the years the City has used management assessments to assist in the selection of candidates for Department Head positions and for other executive, managerial and leadership positions. The City utilizes the results of the assessments to evaluate the candidate's knowledge, skills and abilities to perform the responsibilities associated with the position they are being considered.

The City of Minneapolis (hereinafter referred to as the City) makes this Request for Proposals (hereinafter referred to as the RFP) in order to select a qualified Consulting Firm (hereinafter referred to as the Consultant) for providing management assessment services. The services required are described in the "Scope of Services" (Attachment B), contained within this RFP.

II. **PROPOSAL DUE DATE AND LOCATION:** The Consultant shall submit **ten (10) copies** of their proposals to the City's Procurement Office, labeled:

City of Minneapolis - Procurement
Request for Proposals for:
Management Assessment Services
330 2nd Avenue South, Suite 552
Minneapolis, MN 55401

The submittal shall be made at or before **4:00 P.M. (Minneapolis Time), June 2, 2016. NOTE: Late Proposals may not be accepted.**

In addition to submitting ten (10) copies of their proposal, the Consultant must also submit an electronic copy of the proposal. The electronic copy of the proposal should be sent via email to RFP.Responses@minneapolismn.gov. Procurement staff will deliver these proposals to the department contact shortly after the due date of the proposal.

III. **PROPOSAL FORMAT:** The Consultant shall provide the appropriate information in sufficient detail to demonstrate that the evaluation criteria has been satisfied as specified in Section IV – "EVALUATION OF PROPOSALS – SELECTION OF CONSULTANT."

To allow for easier comparison of proposals during evaluation, proposals should contain the following sections and appendices and be arranged in consecutive order.

A. **Executive Summary** - The Executive Summary should include a clear statement of the Consultant's understanding of the RFP including a brief summary of the Scope of Work. Include, at a minimum, an outline of the contents of the proposal, an identification of the proposed project team, a description of the responsibilities of the project team, and a summary of the proposed services.

B. **Scope of Services** - Describe in detail how services will be provided. Include a detailed listing and description of tasks and deliverables.

C. **Experience and Capacity** - Describe background and related experience demonstrating ability to provide required services. Indicate if company expansion is required to provide service. Attachment C can be used to list some or all of this information.

D. **References** - List references from contracts similar in size and scope. Attachment D can be used to list some or all of this information.

E. **Personnel Listing** - Show involved individuals with resumes and specific applicable experience. Sub-consultants should also be listed, including the identification of any that are certified in the City of Minneapolis Small & Underutilized Business Program.

F. **Cost/Fees** - Indicate proposed cost of service including a description of how costs were determined; hourly rates; direct costs and payment billing schedule; list of charges per classification of employee; cost breakdown for each year of service. Attachment E can be used to list some or all of this information.

IV. EVALUATION OF PROPOSALS – SELECTION OF CONSULTANT: Proposals will be reviewed by an Evaluation Panel made up of representatives of the City, including staff from the Department of Human Resources and other City departments as required. The Evaluation Panel will select a "short list" of qualified Consultants who will be formally interviewed as part of the final selection, as deemed necessary by the City. Evaluations will be based on the required criteria listed in Section III "PROPOSAL FORMAT," and the following:

A. Quality, thoroughness, and clarity of proposal.
B. Qualifications and experience of staff (includes a review of references).
C. How well the Scope of Services offered meets City goals and objectives.
D. Financial responsibility and capacity of company including whether or not the company, any affiliates, subsidiaries, officers or directors have filed for federal bankruptcy protection within seven years of the date of this RFP.
E. Organization and management approach and involvement for a successful project.
F. Cost of services proposed.
G. Insurance coverage as defined for the services. (Note: If the Consultant requires an employee with a professional state license to assist in this project, Professional Liability coverage will be required. If there is no state license involved; Professional Liability coverage can be negotiated to be waived by the City's Contract Manager.)

A formal presentation/interview may be requested of the "short list" of Consultant(s). Specifically, the City may request that the Consultant's Project Manager assigned to the proposed project team lead the presentation and that actual members of the project team (including any sub-consultants) participate in the formal presentation/interview.

If held, the presentation/interview of the "short list" of Consultant(s) will consist of the following elements:

1. Discussion of the Consultant's approach to providing services to the City based upon the Scope of Services described herein.
2. Overview of the Consultant's experience as related to the Scope of Services, including qualifications and experience of assigned staff.

The Evaluation Panel will schedule and arrange for the presentations.

V. SCHEDULE: The following is a listing of key Proposal and Project milestones:

Event	Date*
RFP Release	May 2, 2016
Questions on RFP Due by	May 19, 2016
Responses to Questions posted by	May 26, 2016
Proposals due by	June 2, 2016
Consultant Presentations/Interviews (Tentative)	Week of July 11 or 18, 2016
Estimated Consultant selection	August 15, 2016
Estimated services start date	September 1, 2016
Estimated services end date	August 31, 2019

***Note:** The above schedule is subject to change at the discretion of the City.

VI. **CONTRACT:** The contracting parties will be the City and the Consultant selected to provide the services as described herein. The selected proposal, along with the RFP and any counter proposal will be incorporated into a formal agreement after negotiations. It is the intent of the City to award a single contract for a term of two (2) years with the option to extend the contract, on an annual basis, at the sole option of the City, for up to three (3) additional years.

VII. **DEPARTMENT CONTACT/REQUESTS FOR CLARIFICATION:** The Consultant's primary interface with the City will be with the Contract Manager who will act as the City's designated representative for the Project. Prospective responders shall direct inquiries/questions ***in writing only*** to:

Contract Manager: Charles J. Bernardy, Human Resources, Administration
250 South 4th Street – Room 100
Minneapolis, MN 55415
Email ID: Charles.Bernardy@minneapolismn.gov

All questions are due no later than 4:00 p.m. on May 19, 2106. Responses to the questions will be posted by May 26, 2016 on the City's RFP website at: http://www.minneapolismn.gov/finance/procurement/rfp.

The Contract Manager is the only individual who can be contacted regarding the Project before proposals are submitted. The Contract Manager cannot vary the terms of the RFP.

VIII. **REJECTION OF PROPOSALS:** The City reserves the right to reject any Consultant on the basis of the proposal submitted. The City reserves the right to reject all proposals or any Consultant on the basis of the proposal submitted.

IX. **ADDENDUM TO THE RFP:** If any addendum is issued for this RFP, it will be posted on the City of Minneapolis web site at: http://www.minneapolismn.gov/finance/procurement/rfp

The City reserves the right to cancel or amend the RFP at any time.

ATTACHMENT A - RFP Terms & Conditions

General Conditions for Request For Proposals (RFP)

The General Conditions are terms and conditions that the City expects all of its Consultants to meet. The Consultant agrees to be bound by these requirements unless otherwise noted in the Proposal. The Consultant may suggest alternative language to any section at the time it submits its response to this RFP. Some negotiation is possible to accommodate the Consultant's suggestions.

1. **City's Rights**

   The City reserves the right to reject any or all proposals or parts of proposals, to accept part or all of proposals on the basis of considerations other than lowest cost, and to create a project of lesser or greater expense and reimbursement than described in the Request for Proposal, or the respondent's reply based on the component prices submitted.

2. **Equal Opportunity Statement**

   The Consultant agrees to comply with applicable provisions of applicable federal, state and city regulations, statutes and ordinances pertaining to the civil rights and non-discrimination in the application for and employment of applicants, employees, subcontractors and suppliers of the Consultant. Among the federal, state and city statutes and ordinances to which the Consultant shall be subject under the terms of this Contract include, without limitation, Minnesota Statutes, section 181.59 and Chapter 363A, Minneapolis Code of Ordinances Chapter 139, 42 U.S.C Section 2000e, et. seq. (Title VII of the Civil Rights Act of 1964), 29 U.S.C Sections 621-624 (the Age Discrimination in Employment Act), 42 U.S.C Sections 12101-12213 (the Americans with Disability Act or ADA), 29 U.S.C Section 206(d) (the Equal Pay Act), 8 U.S.C Section 1324 (the Immigration Reform and Control Act of 1986) and all regulations and policies promulgated to enforce these laws. The Consultant shall have submitted and had an "affirmative action plan" approved by the City prior to entering into a Contract.

3. **Insurance**

   Insurance secured by the Consultant shall be issued by insurance companies acceptable to the City and admitted in Minnesota. The insurance specified may be in a policy or policies of insurance, primary or excess. Such insurance shall be in force on the date of execution of the Contract and shall remain continuously in force for the duration of the Contract.

   Acceptance of the insurance by the City shall not relieve, limit or decrease the liability of the Consultant. Any policy deductibles or retention shall be the responsibility of the Consultant. The Consultant shall control any special or unusual hazards and be responsible for any damages that result from those hazards. The City does not represent that the insurance requirements are sufficient to protect the Consultant's interest or provide adequate coverage. Evidence of coverage is to be provided on a current ACORD Form. A thirty (30) day written notice is required if the policy is canceled, not renewed or materially changed. The Consultant shall require any of its subcontractors, if sub-contracting is allowable under this Contract, to comply with these provisions, or the Consultant will assume full liability of the subcontractors.

   The Consultant and its subcontractors shall secure and maintain the following insurance:

   a) **Workers Compensation** insurance that meets the statutory obligations with Coverage B- Employers Liability limits of at least $100,000 each accident, $500,000 disease - policy limit and $100,000 disease each employee.
   b) **Commercial General Liability** insurance with limits of at least $2,000,000 general aggregate, $2,000,000 products - completed operations $2,000,000 personal and advertising injury, $100,000 each occurrence fire damage and $10,000 medical expense any one person. The policy shall be on an "occurrence" basis, shall

include contractual liability coverage and the City shall be named an additional insured. The amount of coverage will be automatically increased if the project amount is expected to exceed $2,000,000 or involves potentially high risk activity.

c) **Commercial Automobile Liability** insurance covering all owned, non-owned and hired automobiles with limits of at least $1,000,000 per accident.

d) **Professional Liability** Insurance or Errors & Omissions Insurance providing coverage for 1) the claims that arise from the errors or omissions of the Consultant or its subcontractors and 2) the negligence or failure to render a professional service by the Consultant or its subcontractors. The insurance policy should provide coverage in the amount of $2,000,000 each claim and $2,000,000 annual aggregate. The insurance policy must provide the protection stated for two years after completion of the work.

4. Hold Harmless

The Consultant will defend, indemnify and hold harmless the City and its officers and employees from all liabilities, claims, damages, costs, judgments, lawsuits and expenses, including court costs and reasonable attorney's fees regardless of the Consultant's insurance coverage, arising directly from any negligent act or omission of the Consultant, its employees, agents, by any sub-contractor or sub-consultant, and by any employees of the sub-contractors and sub-consultants of the Consultant, in the performance of work and delivery of services provided by or through this Contract or by reason of the failure of the Consultant to perform, in any respect, any of its obligations under this Contract.

The City will defend, indemnify and hold harmless the Consultant and its employees from all liabilities, claims, damages, costs, judgments, lawsuits and expenses including court costs and reasonable attorney's fees arising directly from the negligent acts and omissions of the City by reason of the failure of the City to perform its obligations under this Contract. The provisions of the Minnesota Statues, Chapter 466 shall apply to any tort claims brought against the City as a result of this Contract.

Except as provided in section # 13, neither party will be responsible for or be required to defend any consequential, indirect or punitive damage claims brought against the other party.

5. Subcontracting

The Consultant shall provide written notice to the City and obtain the City's authorization to sub-contract any work or services to be provided to the City pursuant to this Contract. As required by Minnesota Statutes, Section 471.425, the Consultant shall pay all subcontractors for subcontractor's undisputed, completed work, within ten (10) days after the Consultant has received payment from the City.

6. Assignment or Transfer of Interest

The Consultant shall not assign any interest in the Contract, and shall not transfer any interest in the same either by assignment or novation without the prior written approval of the City. The Consultant shall not subcontract any services under this Contract without prior written approval of the City Department Contract Manager designated herein.

7. General Compliance

The Consultant agrees to comply with all applicable Federal, State and local laws and regulations governing funds provided under the Contract.

8. Performance Monitoring

The City will monitor the performance of the Consultant against goals and performance standards required herein. Substandard performance as determined by the City will constitute non-compliance with this Contract. If action to correct such substandard performance is not taken by the Consultant within a reasonable period of time to cure such substantial performance after being notified by the City, Contract termination procedures will be initiated. All work submitted by Consultant shall be subject to the approval and acceptance by the City Department Contract Manager designated herein. The City Department Contract Manager designated herein shall review each portion of the work when certified as complete and submitted by the Consultant and shall inform the Consultant of any apparent deficiencies, defects, or incomplete work, at any stage of the project.

9. Prior Uncured Defaults

Pursuant to Section 18.115 of the City's Code of Ordinances, the City may not contract with persons or entities that have defaulted under a previous contract or agreement with the City and have failed to cure the default.

10. Independent Consultant

Nothing contained in this Contract is intended to, or shall be construed in any manner, as creating or establishing the relationship of employer/employee between the parties. The Consultant shall at all times remain an independent Consultant with respect to the work and/or services to be performed under this Contract. Any and all employees of Consultant or other persons engaged in the performance of any work or services required by Consultant under this Contract shall be considered employees or subcontractors of the Consultant only and not of the City; and any and all claims that might arise, including Worker's Compensation claims under the Worker's Compensation Act of the State of Minnesota or any other state, on behalf of said employees or other persons while so engaged in any of the work or services to be rendered or provided herein, shall be the sole obligation and responsibility of the Consultant.

11. Accounting Standards

The Consultant agrees to maintain the necessary source documentation and enforce sufficient internal controls as dictated by generally accepted accounting practices (GAAP) to properly account for expenses incurred under this Contract.

12. Retention of Records

The Consultant shall retain all records pertinent to expenditures incurred under this Contract in a legible form for a period of six years commencing after the later of contract close-out or resolution of all audit findings. Records for non-expendable property acquired with funds under this Contract shall be retained for six years after final disposition of such property.

13. Data Practices

The Consultant agrees to comply with the Minnesota Government Data Practices Act (Minnesota Statutes, Chapter 13) and all other applicable state and federal laws relating to data privacy or confidentiality. The Consultant and any of the Consultant's sub-consultants or sub-contractors retained to provide services under this Contract shall comply with the Act and be subject to penalties for non-compliance as though they were a "governmental entity." The Consultant must immediately report to the City any requests from third parties for information relating to this Contract. The City agrees to promptly respond to inquiries from the Consultant concerning data requests. The Consultant agrees to hold the City, its officers, and employees harmless from any claims resulting from the Consultant's unlawful disclosure or use of data protected under state and federal laws.

All Proposals shall be treated as non-public information until the Proposals are opened for review by the City. At that time, the names of the responders become public data. All other data is private or non-public until the City has completed negotiating the Contract with the selected Consultant(s). At that time, the proposals and their

contents become public data under the provisions of the Minnesota Government Data Practices Act, Minnesota Statutes, Chapter 13 and as such are open for public review.

14. Inspection of Records

Pursuant to Minnesota Statutes, Section 16C.05, all Consultant records with respect to any matters covered by this Contract shall be made available to the City and the State of Minnesota, Office of the State Auditor, or their designees upon notice, at any time during normal business hours, as often as the City deems necessary, to audit, examine, and make excerpts or transcripts of all relevant data.

15. Living Wage Ordinance

The Consultant may be required to comply with the "Minneapolis Living Wage and Responsible Public Spending Ordinance" (http://www.minneapolismn.gov/www/groups/public/@finance/documents/webcontent/convert_255695.pdf), Chapter 38 of the City's Code of Ordinances (the "Ordinance"). Unless otherwise exempt from the ordinance as provided in Section 38.40 (c), any City contract for services valued at $100,000 or more or any City financial assistance or subsidy valued at $100,000 or more will be subject to the Ordinance's requirement that the Consultant and its subcontractors pay their employees a "living wage" as defined and provided for in the Ordinance.

16. Applicable Law

The laws of the State of Minnesota shall govern all interpretations of this Contract, and the appropriate venue and jurisdiction for any litigation which may arise hereunder will be in those courts located within the County of Hennepin, State of Minnesota, regardless of the place of business, residence or incorporation of the Consultant.

17. Conflict and Priority

In the event that a conflict is found between provisions in this Contract, the Consultant's Proposal or the City's Request for Proposals, the provisions in the following rank order shall take precedence: 1) Contract; 2) Proposal; and last 3) Request for Proposals (only for Contracts awarded using RFP).

18. Travel

If travel by the Consultant is allowable and approved for this Contract, then Consultant travel expenses shall be reimbursed in accordance with the City's Consultant Travel Reimbursement Conditions (http://www.minneapolismn.gov/www/groups/public/@finance/documents/webcontent/wcms1p-096175.pdf).

19. Billboard Advertising

City Code of Ordinance 544.120, prohibits the use of City and City-derived funds to pay for billboard advertising as a part of a City project or undertaking.

20. Conflict of Interest/Code of Ethics

Pursuant to Section 15.250 of the City's Code of Ordinances, both the City and the Consultant are required to comply with the City's Code of Ethics. Chapter 15 of the Code of Ordinances requires City officials and the Consultant to avoid any situation that may give rise to a "conflict of interest." A "conflict of interest" will arise if Consultant represents any other party or other client whose interests are adverse to the interests of the City.

As it applies to the Consultant, the City's Code of Ethics will also apply to the Consultant in its role as an "interested person" since Consultant has a direct financial interest in this Agreement. The City's Code of Ethics prevents "interested persons" from giving certain gifts to employees and elected officials.

21. Termination, Default and Remedies

The City may cancel this Contract for any reason without cause upon thirty (30) days' written notice. Both the City and the Consultant may terminate this Contract upon sixty (60) days' written notice if either party fails to fulfill its obligations under the Contract in a proper and timely manner, or otherwise violates the terms of this Contract. The non-defaulting party shall have the right to terminate this Contract, if the default has not been cured after ten (10) days' written notice or such other reasonable time period to cure the default has been provided. If termination shall be without cause, the City shall pay Consultant all compensation earned to the date of termination. If the termination shall be for breach of this Contract by Consultant, the City shall pay Consultant all compensation earned prior to the date of termination minus any damages and costs incurred by the City as a result of the breach. If the Contract is canceled or terminated, all finished or unfinished documents, data, studies, surveys, maps, models, photographs, reports or other materials prepared by the Consultant under this Contract shall, at the option of the City, become the property of the City, and the Consultant shall be entitled to receive just and equitable compensation for any satisfactory work completed on such documents or materials prior to the termination.

Notwithstanding the above, the Consultant shall not be relieved of liability to the City for damages sustained by the City as a result of any breach of this Contract by the Consultant. The City may, in such event, withhold payments due to the Consultant for the purpose of set-off until such time as the exact amount of damages due to the City is determined. The rights or remedies provided for herein shall not limit the City, in case of any default by the Consultant, from asserting any other right or remedy allowed by law, equity, or by statute. The Consultant has not waived any rights or defenses in seeking any amounts withheld by the City or any damages due the Consultant.

22. Ownership of Materials

All finished or unfinished documents, data, studies, surveys, maps, models, photographs, reports or other materials resulting from this Contract shall become the property of the City upon the City's payment for and final approval of the final report or upon payment and request by the City at any time before then. The City at its own risk, may use, extend, or enlarge any document produced under this Contract without the consent, permission of, or further compensation to the Consultant.

23. Intellectual Property

All Work produced by the Consultant under this Contract is classified as "work for hire" and upon payment by the City to the Consultant will be the exclusive property of the City and will be surrendered to the City immediately upon completion, expiration, or cancellation of this Contract. "Work" covered includes all reports, notes, studies, photographs, designs, drawings, specifications, materials, tapes or other media and any databases established to store or retain the Work. The Consultant may retain a copy of the work for its files in order to engage in future consultation with the City and to satisfy professional records retention standards. The Consultant represents and warrants that the Work does not and will not infringe upon any intellectual property rights of other persons or entities.

Each party acknowledges and agrees that each party is the sole and exclusive owner of all right, title, and interest in and to its services, products, software, source and object code, specifications, designs, techniques, concepts, improvements, discoveries and inventions including all intellectual property rights thereto, including without limitations any modifications, improvements, or derivative works thereof, created prior to, or independently, during the terms of this Contract. This contract does not affect the ownership of each party's pre-existing, intellectual property. Each party further acknowledges that it acquires no rights under this Contract to the other party's pre-existing intellectual property, other than any limited right explicitly granted in this Contract.

24. Equal Benefits Ordinance

Minneapolis Code of Ordinances, Section 18.200, relating to equal benefits for domestic partners, applies to each Consultant and subcontractor with 21 or more employees that enters into a "contract", as defined by the ordinance that exceeds $100,000. The categories to which the ordinance applies are personal services; the sale or purchase of supplies, materials, equipment or the rental thereof; and the construction, alteration, repair or maintenance of personal property. The categories to which the ordinance does not apply include real property and development contracts.

Please be aware that if a "contract", as defined by the ordinance, initially does not exceed $100,000, but is later modified so the Contract does exceed $100,000, the ordinance will then apply to the Contract. A complete text of the ordinance is available at:

- http://www.minneapolismn.gov/www/groups/public/@finance/documents/webcontent/convert_261694.pdf

It is the Consultant's and subcontractor's responsibility to review and understand the requirements and applicability of this ordinance.

25. City Ownership and Use of Data

The City has adopted an Open Data Policy ("Policy"). The City owns all Data Sets as part of its compliance with this Policy. Data Sets means statistical or factual information: (a) contained in structural data sets; and (b) regularly created or maintained by or on behalf of the City or a City department which supports or contributes to the delivery of services, programs, and functions. The City shall not only retain ownership of all City Data Sets, but also all information or data created through the City's use of the software and /or software applications licensed by the Consultant (or any subcontractor of sub-consultant of the Consultant) to the City.

The City shall also retain the right to publish all data, information and Data Sets independently of this Contract with the Consultant and any of Consultant's subcontractors or sub-consultants involved in providing the Services, using whatever means the City deems appropriate.

The City shall have the right to access all data, regardless of which party created the content and for whatever purpose it was created. The Consultant shall provide bulk extracts that meet the public release criteria for use in and within an open data solution. The Consultant shall permit and allow free access to City information and Data Sets by using a method that is automatic and repeatable. The Data Sets shall permit classification at the field level in order to exclude certain data.

26. Audit Requirements for Cloud-Based Storage of City Data

If the Consultant's services include the storage of City data using a cloud based solution, then the Consultant agrees to secure the data as though it were "private data" as defined in Minnesota Statutes, Chapter 13. The Consultant shall provide the City with the annual copy of the Federal Standards for the Statement on Standards for Attestation Engagements (SSAE) No. 16 or the International Standard on Assurance Engagements (ISAE) No. 3402. The Consultant agrees to provide a .pdf copy to the City's Contract Manager, upon the Consultant's receipt of the audit results.

ATTACHMENT B - SCOPE OF SERVICES

Over the years the City has used management assessments to assist in the selection of candidates for Department Head positions and for other executive, managerial and leadership positions. The City utilizes the results of the assessments to evaluate the candidate's knowledge, skills and abilities to perform the responsibilities associated with the position they are being considered.

Consultants must indicate whether their organization has the capacity to develop and deliver the types of management assessment services needed by the City. As part of the response to this RFP, Consultants must demonstrate their ability to administer a comprehensive set of assessment services that assess a candidate's qualifications/suitability for a position while providing information to the appointing authority that will assist in the final hiring decision. Consultants can demonstrate their ability to provide these services by providing a list of clients (current and past), job titles of positions Consultant was retained to assess, and dates of the assessments. Consultants are encouraged to provide samples of management assessment reports that they provide to clients.

A. Requirements

The City requires that the Consultant have the ability to deliver the necessary management assessment services needed by the City that meet the following criteria:

1. Administer and deliver comprehensive management assessment services for executive, management and leadership positions. Consultants should provide a description of the process used to assess candidates for these types of positions.

2. Utilize a series of assessment tools that are job related and that assess a candidate's suitability for a position. Consultants should fully describe the process used to determine how and what assessments are conducted, including a description of how the Consultant determines what job related factors will be assessed and once determined how the assessment battery is determined. Include information on how the assessment/selection tools the Consultant utilizes are job related consistent with the *Uniform Guidelines on Employee Selection Procedures*.

3. Ability to provide customized management assessment services that will assess the key competencies, knowledge, skills and abilities needed to perform successfully in the position being filled by the City.

4. Ability to develop and deliver a management assessment process (assessment battery) that is sufficiently comprehensive to assess candidates in relation to the position being filled. For example, a full day assessment may be necessary for a department head position while a half day assessment may be suitable for an entry level manager position.

5. Ability to create and deliver management assessment reports that include:

   a) Strengths and weaknesses of the candidate.
   b) Suitability of the candidate compared to what is needed/required in the position.
   c) Recommendation as to whether the City should hire the individual.

6. Ability to provide remote access to management assessment tools and reports through a secure password protected website.

7. Upon request of the City, Consultants shall prepare and deliver hardcopies of the management assessment reports to the appointing authority and the Chief HR Officer. The hard copies will be provided on behalf of the Consultant at no additional cost to the City.

8. Ability to provide follow-up/feedback services, to enable the candidate to better understand their strengths and areas for improvement as identified from the management assessment process. Follow-up and feedback services may include but are not limited to creation of individual development plans and executive coaching.

9. Confidentiality is of extreme importance to the City. All management assessment related information including the assessment results must be kept confidential and secure at all times.

10. Consultants must include and separate out costs for each of the following:

    - Full day (eight hours) management assessment for a single candidate.
    - Full day (eight hours) management assessments for multiple candidates to include individual cost per candidate. Indicate whether a reduced rate is available should multiple candidates be assessed for the same position.
    - Half-day (four hours) management assessment for a single candidate
    - Half-day (four hours) management assessments for multiple candidates to include individual cost per candidate. Indicate whether a reduced rate is available should multiple candidates be assessed for the same position.
    - Rating compilation and development and delivery of final management assessment report(s).
    - Providing feedback to individual candidates including the hourly rate to be charged for the session.
    - Coaching related services to candidates selected for employment by the City including the hourly rate to be charged for coaching services.
    - Hourly consulting rate for other professional services that may be needed by the City before, during or after the management assessment process.

Note: In addition to the above, the City is requesting Consultants to provide an estimate as to how long they can provide the above cost structure including whether they can maintain a similar cost structure if the City were to agree to a subsequent contract with the Consultant for the services after the initial agreement ends.

11. At the request of the City, the Consultant must have the ability to attend at least one “organizational” meeting with department heads to describe the management assessment process, the steps involved, timelines, etc., and answer questions. The Consultant must provide this service at no additional cost to the City. The City will not be liable for any travel, parking or related expenses that the Consultant may incur as a result of attending the organizational meeting.

12. The City reserves the right to refer individuals who have completed their management assessment to contact the Consultant directly in case of questions about the results. Service provider shall respond to those inquiries that relate to services provided in a timely manner.

13. Consultant will utilize their own equipment, such as computers, photocopy machines, audiovisual or any other equipment required to deliver management assessment services to the City.

14. Consultant must assign a “Project Manager” who will serve as the City’s main point of contact. This individual will be responsible for overseeing and ensuring the City is receiving timely responses to service requests and delivery of management assessment related services.

15. The Consultant, their designated Project Manager, and/or staff, will coordinate the delivery of services with various City employees including staff from the HR Department, the appointing authority and ultimately the City’s Chief HR Officer.

B. Relevant Experience Required

The Consultant must have experience and a proven track record of providing management assessment related services. Moreover, because the City is a highly visible and public entity, the service provider must possess a working knowledge of municipal/local government operations, management systems and services in a large metropolitan area. It is highly desirable that the Consultant possess previous experience providing management assessment related services to the public sector including local government agencies.

C. Performance Measures

Once a contract is signed, and services have been provided, the City will evaluate the Consultant on the following:

1. Services delivered including the timeliness in the completion and delivery of the management assessment related services.
2. Adherence to agreed upon price structure in the delivery of services.
3. Ability to produce quality reports and feedback to appointing authorities including but not limited to elected officials and/or department heads.
4. Confidentiality and data integrity relating to the information generated from the assessment.
5. Feedback received from appointing authorities about the process including the overall value the management assessment added when making the final hiring decision.
6. Feedback received from individual candidates who have been assessed.
7. Feedback received from individual employees who have utilized and received development and coaching related services.

The City places a high degree of value on the quality of the information contained within the management assessment reports as well as the timely delivery of the management assessment related services.

D. Billing System – Invoicing and Payment

Consultant shall provide itemized invoicing. Each City department using this contract will require a separate "account" and separate respective invoices. Invoice shall include department, department contact, and an itemized list of management assessment and coaching services ordered, along with the cost associated with each service purchased. The City's Contract Manager must be kept apprised of all of the services being delivered so costs, activities, etc. can be tracked and monitored.

ATTACHMENT C – Experience and Capacity

Provide information on your organization including background and experience demonstrating ability to provide required services. Your description should be limited to two pages and should include:

1. A company history
2. Relevant previous experience with public sector entities
3. Company Size (number of employees, annual revenue, office locations, etc.)
4. A representative client list
5. The main attributes that differentiate your company from your competitors

In the table below, provide information regarding the team that would be assigned to work with the City to deliver the services required in this RFP:

1. **Name** - List the name of all individuals who will be involved in delivering management assessment related services to the City. Include employees of the consultant as well as individuals who may perform work on behalf for the Consultant as a sub-contractor.

2. **Role -** List the role(s) the individual will play in supporting the Project.

3. **Experience -** Describe the experience the individual has in delivering management assessment services.

4. **Education -** List any relevant education (e.g. degrees, professional certifications, etc.) the individual has and that would be beneficial in delivering management assessment services to the City.

5. **Number (#) of Clients Currently Assigned -** List the number of clients the individual is currently assigned.

6. **Location -** Include the primary office location where the individual works/provides services for the Consultant.

Name	Role	Experience	Education	# of Clients	Location
1.					
2.					
3.					
4.					
5.					

ATTACHMENT D – References

In the table below provide the following information for up to five clients:

1. **Client (Organization) Name** - List the name of the client.
2. **Client Contact -** Include the contact's name, telephone number and email address.
3. **Project Scope -** Describe the scope of the project.
4. **Services Provided -** Provide a brief description of the services provided.
5. **Project Cost -** Provide the total cost of the project. Indicate whether the cost is the actual cost to deliver the Project or an estimated cost to deliver the project.
6. **Sector –** List the specific sector (e.g. private, public, non-profit, etc.) the client operated.

Client Name	Client Contact	Project Scope	Services Provided	Project Cost	Sector
1.					
2.					
3.					
4.					
5.					

ATTACHMENT E – Service Costs and Fees

Indicate the expected cost to deliver the following services. Indicate your company's maximum billing rate applicable for all service categories selected for the duration of the project.

Service Description	Estimated Cost	Maximum Hourly Billing Rate
Full day (Eight hours) management assessment for a single candidate.		
Full day (Eight hours) management assessments for multiple candidates. Indicate whether a reduced rate is available should multiple candidates be assessed for the same position.		
Half-day (Four hours) management assessment for a single candidate.		
Half-day (Four hours) management assessments for multiple candidates. Indicate whether a reduced rate is available should multiple candidates be assessed for the same position.		
Providing feedback to individual candidates including the hourly rate to be charged for the session.		
Creating an individual development plan for an employee.		
Coaching related services to candidates selected for employment by the City including the hourly rate to be charged for coaching services.		
Hourly consulting rate for other professional services that may be needed by the City before, during or after the management assessment process.		
Other Services (List)		

ATTACHMENT F – Work Samples

Please provide examples of work products including but not limited to the following:

1. Feedback reports provided to a candidate who was assessed.
2. Management assessment reports provided to the hiring authority.
3. Individual development plans developed for employees that were created based on the results of a management assessment.
4. Other information you believe would help the City evaluate the management assessment services your organization delivers.