



St. Charles Public Library
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www.stcharleslibrary.org

**REQUEST FOR PROPOSAL (RFP)
STRATEGIC PLANNING SERVICES
ST. CHARLES PUBLIC LIBRARY DISTRICT
DECEMBER 22, 2022**

Submittal Due Date & Time: Wednesday, January 23, 2023 by 5:00 p.m. CST

Submission Guidelines: Email one (1) digital, pdf copy of your proposal to the contact information listed below.

Kate Buckson, Library Director
St. Charles Public Library District
kbuckson@scpld.org
630-549-8966
One S. 6th Avenue
St. Charles, IL 60174-2195

The St. Charles Public Library District reserves the right to reject any and all proposals of parts thereof, to waive any irregularities or informalities in proposal procedures and to award the contract in a manner best serving the interest of the Library. The Library will not return any physical materials received in response to this invitation.

Submittals will not be opened or read in a public forum.

I. Statement of Purpose

The St. Charles Public Library District (Library) has prepared this Request for Proposal in order to retain the services of a qualified firm to assist in the facilitation of a strategic planning process to produce a 3-5 year strategic planning document.

II. Background

For over 130 years, the St. Charles community has supported and benefited from a library. The Library is governed by an elected seven-member Board of Trustees. The Board provides policy direction over the Library system. They are responsible for final approval of the Library's Budget and Tax Levy. Current services are financed through property tax revenue, fees, public donations, and State and Federal aid. The Library provides a popular collection of books, magazines, periodicals, electronic resources, and multi-media materials. The Library maintains a website (www.scpld.org) that serves a variety of information and service needs 24 hours a day, including access to a range of licensed databases and eBooks, music, and other downloadable material.

The Library serves a population slightly over 55,000 and circulates over 1 million items to nearly 32,000 Library cardholders. The Library has a Foundation and a Friends group that contribute immensely to the success of the Library. And last but not least, our talented Staff play an integral role in the operation and success of the Library.

While the Library District serves all of the St. Charles city limits, there are other villages that the district incorporates. The District also includes parts of South Elgin, Wayne, and West Chicago.

The Library currently has a Strategic Plan that will end in 2022.

III. Project Objective

The Library seeks assistance to help develop a guiding document to establish the long-term (3-5 years) future direction of the SCPL by:

- Analyzing the community profile, demographics, and trends;
- Reaching our stakeholders using communication and feedback tools;
- Facilitating forecasting and visioning sessions with the board and staff to develop the plan

IV. Scope of Work

We would like an experienced, professional firm to help us perform, at a minimum, the following:

- Gather community profile information;
- Identify communication tools for engaging with our stakeholders;
- Carry out community engagement efforts with the help of library staff;
- Facilitate one or more visioning sessions with Library Board members;
- Facilitate one or more visioning sessions with the Library Staff;
- Engage with the library's chosen branding consultant to ensure consistency of vision;
- Facilitate the creation of a guiding document including a feedback period and revisions suggested by the Library Board and Staff.

V. Library Resources

The Library will provide any in-house information that the consultant may require to facilitate, analyze, and produce a plan in a timely manner. The Library will assist in marketing any community sessions, or

other tools used by the successful firm. The Library will help make contact with various community groups.

VI. Schedule

Below is the estimated timeline for the search for the consulting firm. The following schedule is subject to change.

Estimated Date	Event
December 22, 2022	Release Request for Proposals
January 23, 2022	Proposals Due
By February 8, 2023	Library Board Awards Contract <i>(subject to delay without notice to proposers)</i>

VII. Questions

Proposers will be required to submit any questions in writing before the close of business Monday, January 13, 2023, in order for staff to prepare written responses. Questions are best received and most quickly responded to when sent via e-mail directly to kbuckson@scpld.org. Questions will not be accepted by phone.

VIII. Proposal Format and Contents

For ease of review and to facilitate evaluation, the proposals for this project should be organized and presented in the order requested as follows:

- a) Section One: Organizational Information: Provide specific information concerning the firm in this section, including the legal name, address, website, and telephone number of your company. Include the name and telephone number of the person(s) in your company authorized to execute the proposed contract. Provide a description of the firm, number of years in business, and its core competencies. Identify the key personnel and their back-ups who will be assigned to the project.
- b) Section Two: Qualifications and Experience: Provide specific information in this section concerning the firm's experience in the services specified in this RFP. Provide specific information on projects that have included the facilitation of strategic planning for public libraries. Examples of projects, as current as possible, should be submitted. References are required. Please provide names, addresses, and telephone numbers of contact persons with three agencies for whom similar services have been provided.
- c) Section Three: Project Approach and Work Schedule: Provide a description of the methodology developed to perform all required services, with a proposed timeline. This projected schedule should contain specific milestones and dates of completion which will be used to set schedules. Also identify the extent of Library personnel involvement deemed necessary, including key decision points at each stage of the project. Information as to the type of any software that is anticipated to be used in the planning process should also be mentioned.
- d) Section Four: Cost of Service: The proposal shall clearly state ALL of the costs associated with the project, broken down by category of products and services, and all on-going costs for recommended or required products and services. The project costs must be broken out and include all expenses that will be charged to the Library, including but not limited to hourly rates for labor, software costs, software maintenance costs, implementation fees, shipping, insurance, communications, documentation reproduction, and all expenses, including travel, meal reimbursement, hotel per diems, taxes, etc. Failure to clearly identify all costs associated with the proposal may be cause for rejection of the Consultant's proposal.

- e) Section Five: Identification of Subcontractors: Proposers shall identify all subcontractors they intend to use for the proposed scope of work. For each subcontractor listed, proposers shall indicate 1. What products and/or services are to be supplied by that subcontractor and, 2. What percentage of the overall scope of work that subcontractor will perform.
- f) Section Six: Additional Information: Include any other information you believe to be pertinent but not required.

IX. Selection Process

- a) Selection criteria refers to the qualifications that the Library would require in order to award a contract for services, or qualifications that the Library intends on using to evaluate proposals in order to select the most qualified proposal for the project. At a minimum, respondents must provide all the requested information in this RFP. The Library will consider:
 - i) demonstrated ability to perform services described;
 - ii) experience, qualifications and expertise;
 - iii) quality of work as verified by references;
 - iv) costs relative to the scope of services;
 - v) a demonstrated history of providing similar services to comparable entities;
 - vi) the locality of the proposer.
- b) The Library may, during the evaluation process, request from any proposer additional information which the Library deems necessary to determine the firm's ability to perform the required services. If such information is requested, the proposer shall be permitted three business days to submit the information requested.
- c) The Library reserves the right to select the proposal which, in its sole judgement, best meets the needs of the Library.
- d) All firms responding to this RFP will be notified of their selection or non-selection after the Library has completed the selection process.
- e) Generally, the firm selected by the Library will be recommended to the Library Board for this project, but the Library Board is not bound to accept the recommendation or award the project to the recommended firm.
- f) After initial screening, the Library may select those firms deemed most qualified for this project for further evaluation. Interviews of these selected firms may be conducted as part of the final selection process. Interviews may have their own separate scoring during the evaluation process.

X. General Information

- a) Rules and Regulations: The issuance of this solicitation does not constitute an award commitment on the part of the Library, and the Library shall not pay for costs incurred in the preparation or submission of proposals. All costs and expenses associated with the preparation of this proposal shall be borne by the proposer.
- b) The Library reserves the right to reject any or all proposals or portions thereof if the Library determines that it is in the best interest of the Library to do so.
- c) All proposers submit their proposals to the Library with the understanding that the recommended selection of the Library is final and subject only to review and final approval by the Library Director and the Library Board. Upon submission, all proposals shall be treated as confidential documents until the selection process is completed.
- d) Nonliability of Library: The Library shall not be liable for any pre-contractual expenses incurred by the proposer or selected contractor(s). The Library shall be held harmless and free from any

and all liability, claims, or expenses whatsoever incurred by, or on behalf of, any person or organization responding to this RFP.

- e) **Proposal Alternatives:** Proposers may not take exception or make material alterations to any requirement of the RFP. Alternatives to the RFP may be submitted as separate proposals and so noted on the cover of the proposal. The Library reserves the right to consider such alternative proposals, and to award an agreement based thereon if it is determined to be in the Library's best interest and such proposal satisfies all minimum qualifications specified in the RFP. Please indicate clearly in the proposal that the proposal offers an alternative to the RFP.
- f) **Form of Agreement:** No agreement with the Library shall have any effect until a contract has been signed by both parties.
- g) **Withdrawal and Submission of Modified Proposal:** A proposer may withdraw a proposal at any time prior to the submission deadline by submitting a written notification of withdrawal signed by the proposer or their authorized agent. Another proposal may be submitted prior to the deadline. A proposal may not be changed after the deadline for submission.