

OCLS RFP 23-001
REQUEST FOR PROPOSAL
Strategic Planning Consultant Services
For the Orange County Library District

Issue Date: May 9, 2023

Due Date: June 26, 2023

Orange County Library District known as Orange County Library System (OCLS), is an independent special taxing district created by Florida Legislature and is governed by an appointed five-member board of trustees. OCLS is soliciting written proposals from qualified consultants to provide strategic planning consulting services and to engage with the community, staff and board of trustees to provide a comprehensive strategic plan framework and implementation plan. OCLS expects the consultant to prepare an adaptable strategic plan that includes prioritized goals, measurable objectives, and activities to meet community needs and a direction forward.

OCLS Project Manager:

Lynette Schimpf, Chief Project Officer, schimpf.lynette@ocls.info

BACKGROUND:

OCLS serves a community of over 1.4 million people with 15 physical locations (two additional locations on the way) and is celebrating its 100-year anniversary in 2023. OCLS is budgeted for 450 employees. The community is ethnically diverse and according to the 2022 U.S. Census population estimates data, 38.8% of the population is white (not Hispanic or Latino), 22.9% is African American, 33.1% is Hispanic, and 5.8% is Asian. DataUSA reports that the median household income is \$61,416 and 14.2% of the population is living in poverty.

OCLS offers a variety of diverse educational programs dedicated to customers of all ages and backgrounds. In FY 21-22 OCLS circulated 3,371,262 items, had 311,772 in event attendance, and 340,160 active library card holders.

The current strategic plan was established in 2003 with the most recent update in 2017. The new leadership team at OCLS would like to replace that strategic plan with one that is more adaptable, relevant, and reflective of the direction of the new leadership team.

OCLS Mission, Vision, Values, Organizational Purpose, Service Standards and Tagline:

Mission:

Adding to quality of life by creating a learning environment and experiences that foster personal growth and development.

Vision:

Where you engage in amazing experiences and opportunities to learn, explore, and create the best you.

Values:

Promote learning to improve the lives of those in the Community.
Empower and foster creativity and collaboration.
Deliver outstanding service to external and internal customers.
Demonstrate respect, integrity, and excellence.

Organizational Purpose:

We Change Lives

Service Standards:

The customer is our hero
Creating a safe adventure
Leave a footnote

Tagline:

Learn. Grow. Connect.

SCOPE OF WORK:

OCLS is requesting proposals from qualified strategic planning consultants which demonstrate the ability to:

- Facilitate the strategic planning process using a methodology effective for public libraries.
- Facilitate planning meetings with stakeholders (community, staff, board members).
- Gather data, statistics, and feedback from nonusers through suitable methods such as surveys, interviews, focus groups and existing reports.
- Gather data, statistics, and feedback from stakeholders including the community, staff and board of trustees through suitable methods such as surveys, interviews, focus groups and existing reports.
- Analyze data and feedback and present it to OCLS strategic planning team, administrative team and other designated individuals.
- Conduct an analysis that evaluates strengths, opportunities, aspirations, and results of OCLS.
- Identify service priorities, goals, objectives and activities.
- Review the current values, mission and vision statements and recommend and facilitate revisions.
- Be available to OCLS staff for follow-up questions as needed.
- Work with OCLS strategic planning team to present a strategic plan that will be communicated to OCLS's stakeholders.
- Facilitate implementation of the new plan with OCLS strategic plan implementation team.
- Deliver all raw and summary data to OCLS at the conclusion of the process.

INSTRUCTIONS TO CONSULTANTS:

Questions:

Questions will only be accepted via email. Please send all questions to schimpf.lynette@ocls.info with the subject: Strategic Plan Consulting Services

All questions must be received on or before 1:00 P.M., EST, on May 30, 2023.

Responses will be posted at www.ocls.info/procurement on June 5, 2023.

Communications:

Consultants shall not contact, communicate with, or discuss any matter relating in any way to this RFP with any staff member of OCLS or any member of the Board of Trustees until such time as a contract is awarded.

Deadline for Receipt:

Proposals must be received via email on or before 1:00 p.m. EST, June 26, 2023. Proposals must be e-mailed to schimpf.lynette@ocls.info with the subject: Strategic Plan Consulting Services

Confirmation:

The OCLS Project Manager will confirm receipt of your submission via a reply email.

Other Information:

- Consultants are responsible for timely emailing and the electronic delivery of their proposal. Proposals must not exceed 25 megabytes.
- Proposals not received for any reason (including but not limited to size-limitations, incorrect email address, etc.) or received after the specified time and date shall be considered non-responsive. The decision to refuse to consider a response that was received beyond the date/time established in the solicitation shall not be the basis for a protest.
- All proposals must be signed by an officer or employee having authority to legally bind the consultant OR include a statement of authority that binds the email sender and an employee with authority to bind the consultant.
- All information submitted will become part of the project file and is a public record. All responses and accompanying documentation will become the property of OCLS and will not be returned.
- A proposal may be withdrawn for consideration however such proposal will not be returned and is public record.

- Trade secrets and information confidential and exempt from Subsection 119.07(1) of the Florida Statutes and Subsection 24(a) of Article I of the Florida Constitution is not solicited nor desired as information to be submitted with proposals. The Florida Statutes and the State Constitution govern whether information in a proposal is confidential or exempt from the Florida Public Records Act. If information is submitted in a proposal which a consultant deems to be a trade secret or confidential and exempt from the Public Records Act, the information shall be submitted with the proposal in a separate, clearly identifiable email referencing the specific statutory citation for such exemption. Submitted proposals which are marked “confidential” (or other similar language) in their entirety or those in which a significant portion of the submitted proposal is marked “confidential” may be deemed non-responsive by the OCLS. The OCLS is not obligated to agree with the consultant’s claim of an exemption and, by submitting a proposal, the consultant agrees to be responsible for defending its claim that each and every portion of the separately marked information is exempt from inspection and copying under the Public Records Act. The consultant agrees that it shall protect, defend, and indemnify, including attorney’s fees and costs, the OCLS for any and all claims and litigation (including litigation initiated by the OCLS) arising from or relating to the consultant’s claim that the separately marked portions of its proposal are not subject to disclosure. If the consultant fails to separately mark portions of its proposal or marks its proposal “confidential” (or other similar language) in its entirety, the OCLS is authorized to produce the entire proposal submitted by the consultant in responding to a public records request.

PRELIMINARY SCHEDULE:

These dates are tentative and are subject to change by OCLS.

Task	Date	Time
Announcement of RFP	Tuesday, May 9, 2023	10:00 AM
Question Submission Deadline	Tuesday, May 30, 2023	1:00 PM
Responses to Questions Posted	Monday, June 5, 2023	1:00 PM
RFP Responses Due	Monday, June 26, 2023	1:00 PM
RFPs Evaluated	July 10-14, 2023	TBD
Inform Consultants of Rankings	Tuesday, July 18, 2023	1:00 PM
OCLS Board of Trustees Selection of Consultant	Thursday, August 10, 2023	6:00 PM
Date to Award Contract	Friday, August 11, 2023	TBD
Contract Start Date	Monday, November 13, 2023	TBD
Draft Strategic Plan Due	Wednesday, May 1, 2024	TBD
Project Completion Date	Friday, May 31, 2024	TBD
In-Person Presentation to OCLS Board	Thursday, June 13, 2024	6:00 PM

PROPOSALS:

Content Requirements:

- A cover letter providing a description of the firm or consultant, including name, address, phone number, and email of main contact.
- An executive summary of the highlights of the proposal conveying the consultant's understanding of the purpose, scope of work, and expected outcomes of the project.
- A summary of the consultant's or consulting firm's qualifications and relevant experience. The successful consultant or firm will have demonstrated expertise in strategic planning for public libraries. **Experience with strategic planning for similar sized public libraries is preferred.**
- A list of key personnel who would be involved in the project. Include their biography, years of experience/expertise in the industry, and their role in the project.
- A detailed work plan that includes a description of the methodology for providing the scope of services, tasks, timeline, and estimated total amount of time that would be spent on the project.
- A detailed schedule of costs that includes consulting, supplies, number of onsite visits and cost per trip, and other costs associated with the planning process.
- References and contact information for at least three public libraries or similar public entities for which the consultant has provided strategic planning services.

Selection Criteria:

All proposals meeting the RFP requirements will be evaluated and scored using the following criteria. Scores will be determined by at least three OCLS staff members with knowledge and expertise with the scope of work and who will individually score the proposals. OCLS staff cannot meet together to rank the proposals unless staff members are meeting in a publicly noticed and scheduled meeting. A ranking will be established by totaling the sum of the scores. OCLS may request additional material, information, references, interviews or presentations from some or all of the consultants submitting proposals.

> Up to 75 Points

- Responsiveness of the written proposal to the purpose, scope, and expected outcomes of the project.
- Relevant experience and qualifications of the consultant and success in strategic planning facilitation for public libraries.
- Proven ability and experience in expertly facilitating staff and public discussions and providing a concise synopsis of the proceedings.
- Relevant experience and qualifications of the key personnel and success in strategic planning facilitation for public libraries.
- The methodology and timeline for carrying out tasks in the scope of work.
- A demonstrated ability to meet deadlines and operate within budget.

>Up to 15 Points

- Positive experience and success in strategic planning for public libraries from references.

> Up to 10 Points

- Project cost

RFP Standards:

- OCLS reserves the right to cancel the award of contract any time before the execution of the contract by both parties.
- The responding consultants bear sole risk and responsibility for the costs incurred in the preparation of the proposal.
- No OCLS Board or staff member shall have a financial interest in the proposal.
- In cases of disputes over differences of opinion as to the services in the proposal, the decision of OCLS shall be final.
- OCLS reserves the right to: ask for clarification in the proposal if the need arises; select a consultant based directly on the proposal; negotiate further with one or more respondents.
- OCLS reserves the right to reject any or all responses to this RFP.