



1112 W. 21st. Ave.

Covington, LA 70433

REQUEST FOR PROPOSAL

Strategic Planning Consultant

March 3, 2021

RFP Number: 21-001

Proposal Opening Date: April 14, 2021

Proposal Opening Time: 2:00 PM CST

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SECTION ONE – PURPOSE

The St. Tammany Parish Library (“STPL”) is seeking Proposals from qualified Consultants (“Proposers”) for the purpose of obtaining information and firm pricing to conduct a far-reaching and inclusive input process to inform and collaboratively create STPL’s Strategic Plan.

The plan will guide STPL’s operations and decision making from January 1, 2022 through December 31, 2026. It will define STPL’s role in the community, guide the Library Board of Control’s (“LBOC”) governance of and advocacy for STPL, and establish a framework for setting operational goals and creating service plans. The purpose of the strategic plan is to position STPL to proactively provide service that meets changing needs in a cost-effective manner and to educate stakeholders about library services.

The plan should also:

- Examine our community’s growth patterns and demographics.
- Develop goals and address the implications of the proposed goals for STPL’s services, collections, technology, staffing and facilities.
- Perform an environmental analysis of the political, economic, and social factors affecting STPL.
- Address strategies for increasing public awareness of STPL’s offerings and services.
- Identify the need for services or changes in services with respect to future trends and technologies.
- Reflect the needs, voices, and interests of a changing and diverse community.
- Identify possible funding needs to respond to service demands.
- Include a process for the LBOC and Staff to annually review and evaluate goals and develop new strategies based on the evaluation.

SECTION TWO – BACKGROUND

STPL has been serving the citizens of St. Tammany Parish for more than seventy years. St. Tammany Parish is 45 minutes north of New Orleans, connected to the larger metropolitan area by the Causeway and Interstate highways. The parish stretches over 1,124 square miles. It consists of charming towns and unique cities, a variety of smaller rural communities, and spreading landscapes of pines and hardwoods. The parish is one of the most affluent in Louisiana with an excellent public school system and a citizenry active in community affairs. St. Tammany Parish is a wonderful place for individuals, families, nature lovers, golfers, boating enthusiasts, admirers of art, and festival-goers.

With an operating budget of \$11 million, STPL serves an expanding population of 233,000+, 39% of whom are registered borrowers. It is primarily funded by an ad valorem property tax of 5.78 mills. The current 15-year millage was approved by the voters of St. Tammany Parish in October of 2007. The millage began in 2010 and is set to expire in 2024. The library will need to renew its millage in the near future. STPL employs a staff of 126 FTE employees, 30 of which are ALA-accredited MLS/MLIS librarians. In 2019, the annual circulation was 1,041,145. STPL offers 249 Internet workstations for public use and access to a full-range of databases. It is known for its creative and well-attended programs for children and teens. It also offers a variety of programs for adults. These include music, performing arts, philosophy, literature, history, genealogy, horticulture, the creative arts, and personal improvement.

STPL has 12 branches open to the public, an administrative office, and a technical services/maintenance location. Our twelve branches offer nearly 625,000 loanable items including books, CDs, DVDs, audiobooks, and magazines. STPL's website offers 24/7 access to downloadable audio and e-books, music downloads, research tools, magazines, newspapers, and videos. Our programs and services are designed to meet residents' cultural, informational, educational, and recreational needs.

STPL has a current facilities capital project improvement plan and has previously collected information from patrons about our services, but does not have a strategic plan in place.

SECTION THREE- SCOPE OF SERVICES

The successful Proposer in this Request for Proposal (“RFP”) process will accomplish all of the following:

- Develop a timeline from start to final plan acceptance. STPL expects this project to be completed not later than nine months from the date a contract is signed.
- Facilitate a strategic planning process with LBOC and STPL Staff using a methodology effective for public libraries.
- Gather data through community research that focuses on library users, non-users, community groups, community leaders, other community stakeholders, the LBOC, the Library Foundation, the two Friends of the Library groups, and Staff to identify community aspirations, strategic areas of focus, environmental obstacles and opportunities, and potential library service strategies. Community input is a key component of this planning process, and may include:
 - Focus groups
 - Public input sessions
 - Individual interviews
 - Paper/online surveys
 - Phone interviews
 - Other methods as identified by the Selected Proposer and STPL
- Facilitate planning meetings and public, LBOC, and Staff input sessions.
- Review the current mission, values, and vision statements and with LBOC and STPL Staff cooperatively develop revisions or creation of such statements based on the findings of the community research.
- Formulate and recommend measurable goals and strategies based on the assessment of STPL’s environment. Include timelines and identified LBOC and Staff positions to complete each strategy based on the results of the process.
- Create a mechanism, training, and timeline for STPL Staff and the LBOC to evaluate the measurable goals during the active years of the plan.
- Partner with marketing staff on all related press releases and event notifications.

- Work with the Library Director and Planning Team to write the strategic plan.
- In addition to development of the formal strategic plan, the Selected Proposer will be required to:
 - Create specifications of a built-in process of regular review, evaluation and adjustment to the plan resulting from changes in the economic, demographic, or political climate.
 - Help institute a strategic planning function and process at STPL. The Selected Proposer will be expected to recommend a strategic planning methodology for use going forward.
- Produce all handouts and visual materials to be used in the course of presentations.
- Present a draft of the strategic plan to the LBOC.
- Incorporate any changes requested by the LBOC.
- Present the final strategic plan to the LBOC.

SECTION FOUR- DELIVERABLES

Data Gathering Phase

STPL expects a multifaceted approach to data collection and expects to see:

- A Summary Report of all findings and data gathered during this phase.
- All raw data sets and information captured during this data gathering phase.

Deliverables:

Summary report and data sets mentioned above.

Strategic Planning Document

STPL wants a well thought out and organized strategic planning document. It should be easily read by both experienced library users and community members who may not know very much about the library. It should include:

- An Executive Summary of the Strategic Planning Document.
- New mission, vision, and values statements for STPL.

- Projections of future demand as affected by information gleaned from data collection and analysis and community needs assessment.
- Clear, concise and attainable library service goals, objectives and activities over a three-stage horizon: short-, medium- and long-term, which includes:
 - Articulation of a long-term vision for STPL.
 - Concrete, medium-term milestones for STPL to accomplish so it achieves the long-term vision.
 - Specific, actionable tasks and activities STPL can complete in the short-term so it remains on track to achieve medium- and long-term goals. At a minimum, the plan should include a tactical implementation plan that focuses on the key issues that must be addressed immediately to ensure the achievement of multiyear goals.
 - Prioritization of current services and how they fit within short-, medium- and long-term goals.
 - Objectives, including identification of current service areas that do not strategically fit within multiyear goals.
 - Identification of impacts related to implementation of the strategic plan with respect to design, planning, programming, promotion/marketing of library services, physical plant, fiscal policies and staffing.
 - Identification of the financial implications of proposed recommendations with respect to the existing and future capital and operating budgets.
- An up-to-date community profile and identification of community markets.
- An environmental analysis of STPL's operating environment, including evaluation of strengths and weaknesses, quality of services, obstacles and opportunities, reputation, management, and budget.

Deliverables

The Strategic Plan document incorporating the elements listed above.

Draft and final presentation to the LBOC.

Strategic Planning Function

The Selected Proposer will ensure STPL is prepared to manage the strategic planning process going forward. Development of this function will ensure the LBOC and Staff are prepared to continue the strategic planning process into the future. To complete this phase of the project, the Selected Proposer should ensure STPL has the proper strategic planning tools, training, processes and capabilities, including, but not limited to:

- Knowledge and understanding of the strategic planning methodologies STPL will follow in implementing and updating its strategic plan.
- Ability to perform self-assessments, using a consistent methodology, including appropriate tools and quantitative measures, for annual strategic planning goal achievement evaluation.
- Ability to create LBOC and Staff committees or working groups to manage, implement and own the strategic planning process and documents.
- Knowledge and resources to gather data and engage community stakeholders.

Deliverables:

Summary of recommendations for STPL to add processes, restructure committees, and other activities needed to continue and maintain effective strategic planning processes.

SECTION FIVE- PROPOSAL REQUIREMENTS

Proposers interested in providing the services described above are requested to submit the following information. Responses to each of the six parts should appear in the same order as in this RFP and should designate by heading and paragraph the item to which the response applies. Please limit the length of your Proposal to 30 pages (excluding appendices) and please limit your Proposal to one unbound volume in print and one electronic document.

STPL, at its discretion, may request that some or all Proposers make oral presentations of their qualifications or to substantiate any portions of Proposals submitted.

Part One – Executive Summary

Each Proposal should be accompanied by an executive summary not exceeding two pages and which is signed by an officer of the Proposer who is responsible for committing the firm's resources. Clearly state the company name, address, telephone, fax and website information. Also provide contact information for the person to whom STPL should direct Proposal correspondence including full name, phone number, email address and physical mailing address.

Present a clear statement describing the type of legal establishment of the organization, the state in which the Proposer is headquartered and the state in which the Proposer is legally established. Please include company information detailing longevity, principals, relevant financial information, number and type of staff, etc. The Proposal should clearly state that the organizational representative has carefully reviewed the RFP and that the Proposer has the ability and willingness to provide all of the necessary services and materials.

Part Two – Proposal Details

Introduction:

Include statements which summarize key points of the Proposal and how the Proposer expects to provide the necessary services and materials. (Not to exceed 1 page.)

Project Understanding:

Include statements by the Proposer describing their understanding and/or assumptions regarding the goals, critical issues, constraints, and risks for the project. (Not to exceed 3 pages.)

Project Approach:

Outline of strategies to complete the requested Scope of Work including tasks, products, and schedules.

Include key decision points at each stage of the project.

Proposed deviations from the desired scope of services set forth above should be clearly noted and justified.

The Project Approach should address all the points in Section Two – Scope of Services.

Part Three – Consultant Qualifications

STPL seeks a qualified Consultant who engages in a collaborative, interactive process and has experience in working with public libraries of a similar size in the development of a long-term strategic plan for a 21st century library.

Selected Proposer must have familiarity with library governance and funding models and with current trends in library services. Successful Proposer and their subcontractors will have demonstrated expertise in developing a plan for public library operations, services, technology, and facilities. Evidence of successful experience in planning is crucial to the selection.

Provide a brief summary with information on the Proposer’s background and experience as it pertains to this project. Is this a core service of the organization? What differentiates you from other vendors? What is the level of experience in the specifics listed in this RFP?

Reference former projects (including URLs), client base, and areas of specialization or differentiation. Include any other pertinent information to support your Proposal. (Not to exceed 1 page.)

Part Four – References

List at least three entities (public libraries preferred) for which similar work has been conducted. Provide the name, title, email, and telephone number of persons who may be contacted for reference concerning the services you provided. Give dates and types of services performed.

Please provide copies of the strategic plans that you have helped create for the entities referenced above. (These examples should be included as appendices to the Proposal and will not count towards the 30-page Proposal size limit.)

Part Five – Staff Qualifications and Key Personnel

Provide a list of key personnel who would be providing services. For each person listed, include current job title, employment history with the Proposer, and resumé that includes the type and length of any relevant experience.

List the names and addresses of all affiliated companies, consultants and/or subcontractors who would provide goods or services under the agreement, as well as their responsibilities in completing the Scope of Work.

Indicate availability of the proposed team during the Proposal period and deliverables schedule.

Individual resumé's should not exceed 2 pages. Provide the primary management contact for the Proposer for this project and the day to day contact.

The Proposer will note any parts of the Proposal that are beyond the expertise of the Proposer, or would be better handled by STPL Staff.

Part Six – Cost

Proposals should specify total costs for all known services and deliverables. Cost should be provided in an easy to read format providing a break-out of specific costs, including:

- The standard hourly rate schedule for proposed staff by discipline or role.
- Number of on-site visits and associated travel expenses.
- Costs for data gathering and analysis.
- Costs and services subcontracted to other providers must be specified.
- Costs for supplies.
- Any other anticipated expenses.
- A comprehensive total project cost quote that specifies hours and labor rates are applied.
- Clear statement on the total length of time during which the services and any related prices presented in the Proposal are valid and reliable.

Provide a sample invoice.

Proposer must describe their billing and refund policy.

Proposer shall be responsible for the payment of business registration fees, permits, licenses, business and occupation taxes and all other taxes.

Indicate if any optional solutions or additional professional services beyond those required to fulfill all services and deliverables of this RFP are available from Proposer, and if so, the prices and/or rates for same. These additional solutions and/or professional services offered by Proposer will not be included in the Cost evaluation.

SECTION SIX– SUBMISSION REQUIREMENTS

One executed original Proposal, two (2) paper copies and one digital copy in PDF format shall be submitted. The digital copies should be emailed to:

Kelly LaRocca, RFP@stpl.us

Include your organization's name and the words "**RFP 21-001 Strategic Planning Consultant Proposal**" in the EMAIL subject line.

The paper copy Proposal shall be clearly marked on the outside of the paper transmittal package with the following information:

Your Organization's Name
RFP 21-001 Strategic Planning Consultant

The paper and the digital Proposals must be received no later than 2:00 p.m. CST on April 14, 2021 at:

St. Tammany Parish Library Attn: Kelly LaRocca
1112 W 21st Ave., Covington, LA 70433

Proposals received by STPL after this deadline will not be considered. Late Proposals will be destroyed. Proposals received before the due date will be held in a secured area until the time of opening.

Proposals must be signed by a corporate official, owner or a person who has been authorized to make such a commitment.

STPL does not conduct a public opening of Proposals, nor are evaluation “progress reports” available. Notification of award will be sent to all Proposers.

Proposals must clearly state the total length of time during which the services and any related prices presented in the Proposal are valid and reliable. It is required that this time period be no less than one hundred twenty (120) days from the date the Proposals are due.

Proposers shall respond to each and every requirement contained in the Section Five - Proposal Requirements of this RFP. Responses must be in the same order in which the points appear in the RFP. The Proposal must be clear, unambiguous, and capable of being understood without reference to other documentation.

Failure to address a particular requirement shall be presumed to mean that the function or requirement is unavailable.

Proposers are advised that the submission of multiple Proposals, or alternative approaches to specific sections of the requirements, will be considered non-compliant and those Proposals will be disqualified. We are relying on the Proposer as the expert to identify in its Proposal the approach which is believed to be the most effective to produce the required services.

Failure to comply with the requirements of this RFP may result in disqualification.

The Proposer must clearly state that the Proposal submitted presents a true offer of services and/or materials. It must be clearly stated that the Proposal is not a result of any direct or indirect coordination or collusion with other Proposers submitting a Proposal in response to this RFP.

A Proposer may withdraw or modify its Proposal in writing by delivery service, certified U.S. Mail or by hand delivery at any time prior to the RFP deadline for submission.

SECTION SEVEN – REQUESTS FOR CLARIFICATION

Questions and requests for clarification concerning this RFP shall be submitted **IN WRITING** or **EMAIL** no later than **5:00 p.m. CST March 24, 2021** to:

St. Tammany Parish Library, Attn: Kelly LaRocca
1112 W 21st Ave., Covington, LA 707433

The words “**RFP 21-001 Strategic Planning Consultant**” shall appear on the envelope or in the email subject line. Email should be addressed to **RFP@stpl.us**. Inquiries shall state the page and the applicable RFP section or paragraph to which the question(s) pertain. Faxed requests for clarification will not be accepted. Confirming receipt of questions is the responsibility of the submitting organization.

Proposer shall be responsible for requesting clarification concerning the RFP to allow the Proposer to respond specifically, thoroughly, and clearly to every specification, requirement or question presented in the RFP. STPL shall in no way be responsible for any errors or ambiguities in the RFP. A failure of STPL to respond to any request for clarification shall not be considered by any Proposer that STPL agrees or disagrees with any statement, which may be contained in the request for clarification.

All clarifications to the RFP will be posted online at www.sttammanylibrary.org/projects by the date indicated in Section Ten – RFP Schedule. The source of an inquiry occasioning a clarification shall not be given.

Any information provided after distribution of the RFP is for clarification only and not binding on STPL.

SECTION EIGHT – EVALUATION

STPL intends to select the Proposal that is most advantageous to itself. The responses to this RFP will be evaluated by the Strategic Planning RFP Committee established for this purpose.

Evaluation Criteria

The Strategic Planning RFP Committee, in preparation for a recommendation to the LBOC, will evaluate Proposals considering factors included in the Evaluation Criteria Matrix.

The evaluation committee shall assign points to its evaluation of each Proposal as follows:

Evaluation Criteria	Possible Points
Compliance with the RFP <ul style="list-style-type: none"> • All six parts of the Proposal Requirements are addressed. 	15
Responsiveness to and understanding of the Scope of Work.	10
Quality of work plan, methodology, and overall approach proposed to complete the Scope of Work.	25
Ability to perform within the stated timeframe	10

<p>Qualifications</p> <ul style="list-style-type: none"> • Demonstrated knowledge, skills, and experience in conducting successful strategic planning projects for public libraries. • Qualifications of team members assigned to the project. • References. 	20
<p>Cost</p> <ul style="list-style-type: none"> • Cost will be evaluated based on the firm, fixed lump sum price for the completion of the Scope of Work. • Rates for additional professional services will be reviewed and noted, as applicable. These will not be included in the Cost evaluation. • Prices for optional solutions will be reviewed and noted, as applicable. These will not be included in the Cost Proposal evaluation. 	10
<p>Proposal quality</p> <ul style="list-style-type: none"> • Readability and organization of proposal. 	10
Total	100

The RFP process will follow the steps below.

1. After the RFP has been opened, an evaluation team will rate each of the Proposals according to the written criteria and rank the Proposals according the Proposer’s ability to meet or exceed those criteria.
2. The Evaluation Committee will recommend up to three of the top scoring Proposals for LBOC consideration. These top three scoring Proposers will be interviewed by LBOC and be invited to present a short oral presentation of their Proposal.

3. LBOC will rank the Proposers based on these interviews and the Proposals.
4. STPL will begin negotiation of a contract with the highest ranked Proposer.

If STPL and the apparent Successful Proposer are unable to enter into a contract for any reason, the Contract may be awarded to the next highest-ranked Proposer.

STPL reserves the right to accept other than the lowest priced Proposal and to negotiate with any Proposer when the best interests of STPL are served by so doing.

Proposer shall be aware that this RFP is not subject to the Louisiana Public Bid Law or the Louisiana Procurement Code. As such, Proposers are not provided an opportunity to protest the process or results of this RFP.

STPL reserves the right to retain all Proposals submitted and use any idea in a Proposal regardless of whether that Proposal is selected.

The designation of certain information as trade secrets and/or privileged or confidential proprietary information shall only apply to the technical portion of the Proposal. The cost Proposal will not be considered confidential under any circumstance. Any Proposal copyrighted or marked as confidential or proprietary in its entirety may be rejected without further consideration or recourse.

For the purposes of this procurement, the provisions of the Louisiana Public Records Act (LSA-R.S. 44.1, et. seq.) will be in effect. Pursuant to this Act, all proceedings, records, contracts, and other public documents relating to this procurement shall be open to public inspection. Proposers are reminded that while trade secrets and other proprietary information they submit in conjunction with this procurement may not be subject to public disclosure, protections must be claimed by the Proposer at the time of submission of its Technical Proposal. Proposers should refer to the Louisiana Public Records Act for further clarification.

The Proposer must clearly designate the part of the Proposal that contains a trade secret and/or privileged or confidential proprietary information as “confidential” in order to claim protection, if

any, from disclosure. The Proposer shall mark the cover sheet of the Proposal with the following legend, specifying the specific section(s) of his Proposal sought to be restricted in accordance with the conditions of the legend:

“The data contained in pages ____of the Proposal have been submitted in confidence and contain trade secrets and/or privileged or confidential information and such data shall only be disclosed for evaluation purposes, provided that if a contract is awarded to this Proposer as a result of or in connection with the submission of this Proposal, STPL shall have the right to use or disclose the data therein to the extent provided in the contract. This restriction does not limit STPL’s right to use or disclose data obtained from any source, including the Proposer, without restrictions.”

Further, to protect such data, each page containing such data shall be specifically identified and marked “CONFIDENTIAL”.

Proposers must be prepared to defend the reasons why the material should be held confidential. If a competing Proposer or other person seeks review or copies of another Proposer's confidential data, STPL will notify the owner of the asserted data of the request. If the owner of the asserted data does not want the information disclosed, it must agree to indemnify STPL and hold STPL harmless against all actions or court proceedings that may ensue (including attorney's fees), which seek to order STPL to disclose the information. If the owner of the asserted data refuses to indemnify and hold the state harmless, STPL may disclose the information.

STPL reserves the right to make any Proposal, including proprietary information contained therein, available to STPL staff, the LBOC, St. Tammany Parish personnel, the St. Tammany Parish Council, or other Parish and state agencies or organizations for the sole purpose of assisting STPL in its evaluation of the Proposal. STPL shall require said individuals to protect the confidentiality of any specifically identified proprietary information or privileged business information obtained as a result of their participation in these evaluations.

If your Proposal contains confidential information, you should also submit a redacted copy along with your Proposal. If you do not submit the redacted copy, you will be required to submit this copy within 48 hours of notification from STPL administration. When submitting your redacted copy, you should clearly mark the cover as such - “REDACTED COPY” - to avoid having this copy reviewed by an evaluation committee member. The redacted copy should also state which sections or information have been removed.

STPL reserves the right, at its sole discretion, to waive minor irregularities in submittal requirements, to request modifications of the response, to accept or reject any or all responses received, and/or to cancel all or part of this Request for Proposal at any time prior to awards.

SECTION NINE – RFP SCHEDULE

STPL has set the following schedule for the selection process:

March 3, 2021	RFP Issued
March 24, 2021	Deadline for receipt of written requests for clarification
March 31, 2021	Responses to written requests for clarification
April 14, 2021, 2:00 PM	Deadline for receipt of Proposals
April 14, 2021, 2:00 PM	Opening of Proposals
April 21, 2021	Evaluation of Proposals begins

SECTION TEN – SPECIAL CONDITIONS

Proposer Responsibility

Any Proposer submitting a response agrees to all the rules and conditions required in this RFP.

All materials submitted in response to the RFP shall become the property of STPL. The organization's Proposal and the RFP shall become part of any contract that is negotiated with the successful organization unless modified in writing by the contract.

The successful Proposer shall be required to assume responsibility for delivery of goods and/or services as defined in the contract.

The Proposer shall demonstrate that it has in effect all licenses, permits and authorizations to provide all products and services it proposes.

It is the Proposer's responsibility to ensure that the content of the RFP is not defective and does not inadvertently restrict competition. Notice of such alleged defects or restrictions in the RFP must be in writing and be made prior to the due date to permit time for revisions to be issued.

The cost for developing Proposals in response to this RFP is entirely the obligation of the organization and shall not be charged to STPL in any manner.

Alternate Organization Selection

If STPL fails to negotiate a contract with the Proposer of first choice, STPL reserves the right to enter into new contract negotiations with an alternate Proposer(s).

Payment Schedule

STPL payments, subject to negotiations, shall be made to the Selected Proposer not more than forty-five (45) days after STPL receives the Selected Proposer's invoice for goods/services received as specified in the contract between STPL and the organization selected.

Wages

The Selected Proposer shall be required to pay any wages or salary required by the laws or regulations of any government entity having jurisdiction.

News Release

Mention of STPL, Staff, or programs in advertising, customer lists, photographs, or articles in the professional literature pertaining to an award resulting from Proposals made in response to this RFP shall not be made by any organization without prior written approval from STPL administration.

Written Contract

STPL and the Selected Proposer shall negotiate a contract and nothing shall be binding on either party until the contract is in writing and signed by both parties, except the organization is obligated to keep its Proposal in effect for the period specified in this RFP.