

Joliet Public Library
150 North Ottawa Street
Joliet, Illinois 60432

Request for Proposal (RFP) **Strategic Planning Consultant Services**

Introduction

The Joliet Public Library is ready to develop a new Strategic Plan and seeks the assistance of a consultant. After sunsetting the previous plan and completing a major renovation of the downtown facility, the Board and Staff are motivated to craft direction for programs and services over the next three years. The new outline of goals will be adopted by the Board in order to provide direction for Trustees, Administration, and the entire Staff in order to best serve the community.

Planning Background

The last Strategic Plan was adopted in 2016 and completed in 2022. While this Plan served the Library well, there are interesting challenges and exciting opportunities facing the Library today that demand a fresh look at planning for the coming years.

Plan Vision

The new Strategic Plan will address existing conditions and present a vision for the future. The Plan should be realistic and implementable. The Plan should be succinct. The Plan will serve as a guide for decisions about staffing, collections, programs, and services.

Qualifications

All consultants responding to this request must meet the following minimum requirements:

- Demonstrated experience in strategic planning, Library-wide participation, and visioning at the local government level.
- Demonstrated experience in providing strategic planning consulting services within an approved budget.
- Proven knowledge of strategic planning standards and best practices.

Scope of Work

The chosen consultant will facilitate a trustee and staff participatory process in order to draft a new Strategic Plan for the Joliet Public Library. Trends that affect the Library at regional, state, and national level must be considered.

It is anticipated the consultant will generally perform the following tasks:

- Design and execution of a strategic visioning and comprehensive planning process.
- Develop an actionable strategic plan, including a projected budget.
- Develop recommendations regarding the plan's implementation and structure.

Proposed Schedule

May 8, 2023 -	Request for Proposal issued by the Library.
May 26, 2023 -	Questions from consultants are due to the Library.
June 12, 2023 -	Questions & answers are published on the Library's website.
June 23, 2023 -	Final proposals are due to the Library.
July 2023 -	Proposals evaluated and potential interviews scheduled.
July 21, 2023 -	Deadline for chosen consultant announcement.
August 2023 -	Work on the Strategic Plan begins.
December 15, 2023 -	Finished Plan is presented to the Library.
January 2, 2024 -	Trustees, Administration, and Staff begin implementation.

Budget and Administration

The chosen consultant will be retained by Joliet Public Library as an Independent Contractor. The project will be managed by **Executive Director Megan Millen**. The Library expects to enter into a lump sum contract with the selected consultant.

Proposal Requirements

All proposals must contain the following information:

1. Consultant Details

- a. **Overview:** The responding consultant's name, address, and contact information. A brief history and description of the consultant, the consultant's organizational structure, location of principal offices, year consultant was established (including former names of the consultant),

number of professional personnel, and other pertinent information such as the consultant's experience providing similar services to organizations like the Joliet Public Library.

- b. **References:** A minimum of three examples of the consultant's recent relevant experience with clients comparable to the Joliet Public Library who can serve as references and include a contact name, telephone number, website location, and the services provided.

Each example should:

- demonstrate the consultant's capability to successfully complete projects;
- show they can meet schedule deadlines without delays;
- complete similar projects within a specified budget;
- list the initial cost estimates and the final project expenses;
- cost with an explanation of any differences; and,
detail how closely the timeline was followed for each project.

- c. **Project Manager:** The name, resume, and experience of the project manager who will have direct and continued responsibility for the project. This person will be the Library's contact on all matters dealing with the project and will handle all day-to-day activities through to completion. If called for an interview, this person is required to attend.

- d. **Staff:** The names and resumes of all staff who will work on the project. Individual resumes shall be limited to two pages and shall detail recent relevant experience. Include each individual's availability for this project. Only individuals who will actually work on the project should be included.

- e. **Sub-Consultants:** If the prime consultant proposes to use subconsultants, the following must be included:
- The names of any outside consultants and/or sub-consultants and the individuals to be utilized. Include a brief description of their role on the project, an overview of the consultant, an organizational chart, and a minimum of three examples of recent relevant experience for each outside consultant/sub-consultant.
 - Resumes of all prime and sub-consultant personnel that will work on the project. Individual resumes shall be limited to two pages and shall detail recent relevant experience. Include each individual's availability for this project. Only individuals who will actually work on the project should be included.

- f. **Conflict of Interest Statement:** Provide a list of any contracts for work which your consultant is currently involved in which could be considered a conflict of interest. Provide a statement regarding whether the consultant has any conflict of interest with respect to the Joliet Public Library.

- g. **Required Library Resources:** Provide a list of all resources you will need the Library to supply.
- h. **Contract:** An unsigned copy of your standard service contract for the Joliet Public Library to review and any additional stipulations of which the Library should be aware.

2. Project Plan

The proposed work plan shall include, at a minimum, the following:

- a. The consultant's understanding of the project and approach to the work.
- b. A detailed list of the items of work to be performed. Each task shall include the personnel, assigned by name and title.
- c. A schedule showing the various tasks and total time-frame proposed to complete the project.
- d. Any other relevant information.

3. Costs

Complete costs, including all communication and travel expenses.

4. Deliverables

A detailed listing and explanation of the proposed deliverables should be included as part of the proposal. At a minimum, the following deliverables are expected:

- a. Process components:
 - Strategic planning process timeline and overview.
 - Board input process, including facilitation and reporting.
 - Staff input process, including facilitation and reporting.
 - Presentations to the Board, including interim reports and a final report.
- b. Strategic Plan
 - Plan incorporates goals, objectives, and action steps for the next three years ensuring that the Library meets the needs of the community.
 - Recommended implementation process.

Evaluation Process

The Library reserves the right to reject any or all proposals, or any part thereof, make counter proposals and/or engage in negotiation with any or all consultants making a proposal in order to obtain the required and appropriate services at a cost acceptable to the Library and in its sole judgment will best serve the interests of the Library. The consultant's qualifications, cost and proposal as to the services will be considered in awarding the services. The Library reserves the right to expand the response period, including but not limited, to supply further information, to make revisions in the scope of

services or to solicit additional proposals from other consultants. The Library reserves the right to cancel or amend the RFP at any time, without liability for any loss, damage, cost or expense incurred or suffered by any Proposer as a result of that change or cancellation. Each consultant is solely responsible for the risk and cost of preparing and submitting its proposal to this RFP, and the Library is not liable for the cost of doing so or obliged to remunerate or reimburse any Proposer for that cost. This RFP does not impose on the Library any duty of fairness or natural justice to any or all respondents with respect to this RFP or the process it creates. The Library is entitled to act in its sole, absolute and unfettered discretion.

In considering any responses delivered in response to the RFP, the Library among other things, reserves the absolute and unfettered discretion to:

- accept or reject any proposal that fails to comply with the requirements set out in the RFP for the content of proposals;
- assess proposals as it sees fit, without in any way being obligated to select any proposal or Proposer;
- assess and select proposals as it sees fit without being obliged in any way to select the proposal that offers the lowest price or cost;
- determine whether any proposal or proposals satisfactorily meet the selection criteria set out in this RFP;
- require clarification after the dates and times set out herein from any one or more of the consultants in respect of proposals submitted;
- communicate with, meet with or negotiate with any one or more of the consultants respecting their proposals or any aspects of the project;
- reject any or all proposals with or without cause, whether according to the selection criteria set out herein or otherwise.

Proposals will be evaluated by representatives of the Library with such other assistance as it might require. Proposals will be evaluated based on demonstrated experience and qualifications of the consultant, the proposed cost for the services, and the availability and capacity of the consultant to perform the services in a timely manner.

Selection of a consultant will be based on the proposal considered most advantageous to the Library. The selection team will use, but will not be limited to, the following criteria to evaluate each proposal:

- Adherence to the intent of this RFP.
- Approach to the project and its fit with this community.
- Consultant's qualifications and reputation.

- Prior experience on similar projects.
- Quality of the proposed project plan and deliverables.
- Range of services provided.
- Cost of services provided.
- References.
- Assessment of the consultant's ability to meet deadlines and stick to budget.
- The consultant's prior experience in working with staff committees.
- The consultant's overall expertise in carrying out the proposed process.

All consultants are advised that in the event of receipt of an adequate number of proposals, which in the opinion of the Library require no clarification or supplementary information, such proposals may be evaluated without discussion. Hence, proposals should be initially submitted on the most complete and favorable terms which the consultant is capable of offering.

The Library may conduct discussions with any consultant who submits an acceptable or potentially acceptable proposal. The Library reserves the right to request the consultant to provide additional information during this process.

The Library may require follow-up interviews with the potential consultants. As part of the interview, each respondent will be expected to make a short presentation on the consultant's experience and approach to the project. Each respondent should also be prepared to answer questions related to their experience and their proposal. Interviews are expected to last approximately 30-45 minutes.

The Joliet Public Library Board of Trustees has final authority on funding and to approve a contract with the selected consultant. The Joliet Public Library Board of Trustees reserves the right to reject any and all proposals, waive irregularities and technicalities, and make an award in the best interest of the Library. This Request for Proposal does not constitute a commitment by the Library to award a contract and the Library reserves the right to cancel this Request for Proposal.

Submission

An electronic copy in PDF format must be received by **4pm, Friday, June 23, 2023** at:

mmillen@jolietlibrary.org

Late submittals will not be accepted.

Please use the following subject line with your emailed submission:

Strategic Plan Response 2023

All inquiries regarding this RFP should be submitted via email to:

mmillen@jolietlibrary.org

Confidentiality

As a unit of local government, the Library is subject to the Illinois Freedom of Information Act ("FOIA"), 5 ILCS 140/1 et seq. as amended. Therefore, after award of the contract, responses, documents, and materials submitted by the Proposer in response to this RFP will be available for public inspection in accordance with FOIA. Based on the public nature of RFPs, where applicable, a Proposer must inform the Library, in writing, of the exact materials in the offer which it claims are exempt from disclosure pursuant to FOIA. Although the Library does not guarantee that information contained in any proposal will remain confidential, if a Proposer considers that any part of its proposal is proprietary, including by reason of its being copyright, the proposal must clearly identify those portions of it that are considered proprietary

Eligibility to Enter into Public Contracts

The successful Proposer must be eligible to enter into public contracts and shall not be barred from contracting with any unit of state or local government as a result of a violation of either Section 33E-3, or 33E-4 of the Illinois Criminal Code, or any similar offense of "Bid-rigging" or "Bid-rotating" of any state or of the United States.

Disclaimer

This Request for Proposals (RFP) is not an offer to purchase. The RFP is solely a request for expressions of interest and statements of qualifications. It is not an invitation for tenders, an offer to contract, or an invitation for offers capable of acceptance to create a

contract. No contractual or other legal obligations or relations between the Library and any other person can or will be created hereunder.

The Library assumes no financial responsibility for the cost of preparation of proposals by respondents nor does it make any commitment to enter into a contract for service based on responses to this RFP.

Compliance with the Law

The Proposer shall at all times observe and comply with all laws, ordinances and regulations of the Federal, State, county and local government, which may in any manner affect the preparation and submission of the RFP, the contract with the Library and the performance of the services.

Representation

By submitting its proposal to the Library, each Proposer represents and warrants to the Library that the information in its proposal is accurate and complete.

Waiver and Allocation of Risk

The Library accepts no responsibility or liability for the accuracy or completeness of this RFP or of any recorded or oral information communicated or made available for inspection by the Library, and no representation or warranty, either express or implied, is made or given by the Library with respect to the accuracy or completeness of any of those things. The sole risk, responsibility and liability connected with reliance by any Proposer or any other person on this RFP or any other such information as is described in this section is solely that of each Proposer. Each Proposer acknowledges and agrees that it is solely responsible for obtaining its own independent financial, legal, accounting and other advice with respect to the contents of this RFP or any such information as is described in this section. Each Proposer who submits a proposal to the Library is deemed to have released the Library from, and waived, any action, cause of action, claim, liability, demand, loss damage cost or expense, of every kind, in any way connected with or arising out of the contents of this RFP or any such information as is described in this section. Each Proposer who submits a proposal is deemed to have agreed that it is solely responsible and liable to ensure that it has obtained and considered all information necessary to enable it to understand the requirements of this RFP, and of the services, and to prepare and submit its proposal.