

MONTGOMERY COUNTY



Request for Proposal (RFP)# 19-06
for
Library Strategic Plan Consulting Services
Issue Date: May 3, 2018
Proposal Due Date and Hour: May 30, 2018 3:00 p.m.

Montgomery County Purchasing Department
755 Roanoke Street, Suite 2C
Christiansburg, VA 24073-3179

TABLE OF CONTENTS

Request For Proposal Number 19-06

Library Strategic Plan Consulting Services

<u>Section #</u>	<u>Description</u>	<u>Page Number</u>
I	Purpose.....	1
II	Background.....	1
III	Statement of Need	1
IV	Proposal Preparation and Submission Requirements.....	3
V	Evaluation and Award of Contract	5
VI	Reservation of Rights	5
VII	Contract Administration.....	5
VIII	Payment Procedures.....	5
IX	Contract Period.....	6

ATTACHMENT A: Terms and Conditions

ATTACHMENT B: Montgomery County Standard Contract (sample)

COUNTY OF MONTGOMERY, VIRGINIA
RFP # 19-06

ISSUE DATE: MAY 3, 2018

Library Strategic Consulting Services
(TO BE COMPLETED AND RETURNED)

GENERAL INFORMATION FORM

QUESTIONS: All inquiries for information regarding this solicitation should be directed to: Heather M. Hall, C.P.M., Procurement Manager, Phone: (540) 382-5784; faxed to (540) 382-5783, or e-mail: hallhm@montgomerycountyva.gov

DUE DATE: Sealed Proposals will be received until **May 30, 2018**, up to and including **3:00PM**. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.

ADDRESS: Proposals should be mailed or hand delivered to: **Montgomery County Purchasing Department, 755 Roanoke Street, Suite 2C, Christiansburg, Virginia 24073-3179**. Reference the Due Date and Hour, and RFP number in the lower left corner of the return envelope or package.

COMPANY INFORMATION/SIGNATURE: In compliance with this Request For Proposal and to all conditions imposed herein and hereby incorporated by reference, the undersigned offers and agrees to furnish the services and goods in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Full Legal Name (print)		Federal Taxpayer Number (ID#)	Contractor's Registration
Business Name / DBA Name / TA Name and Address		Payment Address	Purchase Order Address
Contact Name/Title		Signature (ink)	Date
Telephone Number	Fax Number	Toll Free Number	E-mail Address

COUNTY OF MONTGOMERY
RFP# 19-06
Library Strategic Plan Consulting Services

I PURPOSE: The intent and purpose of this Request for Proposal (RFP) is to establish a contract through competitive negotiation for Library Strategic Plan Consulting Services for the Montgomery-Floyd Regional Library (MFRL), Virginia herein after referred to as “County.”

Montgomery-Floyd Regional Library seeks a facilitator to develop a strategic plan to guide the organization through the next five years. The plan will guide the library board and administration regarding system initiatives, future programs, and service priorities. The plan will include measurable goals and objectives, suggested timelines, and benchmarks. Input gathered for the plan will come from stakeholders including system staff and board members, constituent groups, county and town citizens and others. It will be cognizant of the funding challenges and opportunities in the current environment.

II BACKGROUND:

Montgomery County is located in the southwestern part of Virginia in the region known as the New River Valley. This region takes its name from the New River, the nation's oldest and the world's second oldest river, and includes the counties of Floyd, Giles, Montgomery, Pulaski, and the City of Radford. The County has a land area of 393 square miles and lies in the broad picturesque area between the Appalachian Plateau and the Blue Ridge Mountains. Topography varies from gently rolling to steep mountainous terrain, with elevations varying from 1,300 to 3,700 feet above sea level. The majority of the County is at an elevation of 2,000 feet.

Today the Towns of [Blacksburg](#) and [Christiansburg](#), the County seat, are the population centers of the County and are located approximately 35 miles southwest of the City of Roanoke. Blacksburg is home to [Virginia Polytechnic Institute and State University](#) (Virginia Tech). Founded in 1872 as a land-grant college, Virginia Tech is the largest university in Virginia and one of the country's leading research institutions. The County had a 2017 population of 98,509. (This includes two incorporated towns, Blacksburg and Christiansburg, with a combined population of approximately 63,861)

Library System Background

Montgomery-Floyd Regional Library (MFRL) is a 4 branch library system serving Montgomery and Floyd counties in Virginia. Headquartered in Christiansburg, it is overseen by a 9 member Library Board of Trustees. Each Montgomery County Trustee is appointed by a member of the Montgomery County Board of Supervisors to represent a supervisor district; two trustees from Floyd County are appointed by the Floyd County Board of Supervisors to serve at large. To strengthen our community, the Montgomery-Floyd Regional Library provides individuals with access to information, experiences and ideas. MFRL serves 113,000+ residents. Each year, MFRL welcomes over 400,000 patrons to its branches and logs over half a million web page views. The Library checks out over 650,000 items annually, and over 30,000 people of all ages attend MFRL programs and events each year. MFRL also plays a significant role in the local community, partnering with local agencies, schools and organizations that share the vision to enrich and enhance the lives of its citizens.

General information about the Library System, including links to previous Strategic Plans and Annual reports, is available through the library's web site at <http://www.mfrl.org>

III STATEMENT OF NEED:

The County needs the services of a Contractor that can provide the following:
Collaborate and communicate with the Strategic Planning Committee throughout all stages of the strategic planning process.

Discovery and Analysis

- Gain in-depth understanding of MFRL's current organizational mission, vision, values and strategic plan.
- Gain in-depth understanding of MFRL's current organizational structure and capacity.
- Review current range of library services and programs, including underlying planning and evaluation processes.
- Lead a detailed analysis of the Library System, such as a Strength, Weakness, Opportunity, Threats (SWOT) analysis, Strength, Opportunity, Aspirations, and Results (SOAR) analysis, Political, Environmental, Societal and Technological (PEST), or other analysis of the System, being certain to gather input from key internal stakeholders.
- Work with the Strategic Planning Committee to understand the MFRL service area, and lead the gathering and analysis of data to fully identify the service area's diversity of external stakeholders in library service provision for a community engagement process.

- Conduct an environmental scan to identify key demographic, economic, social, technological and other data sets and trends that may impact on library service delivery in Montgomery and Floyd Counties.

Community Engagement Process

- Develop and facilitate a process for community engagement with external stakeholders, both individuals and groups/agencies, to gather input and identify library service needs and interests. Specifically identify and engage key agencies that supplement, complement and/or duplicate services provided by the library or who share clientele and/or can provide mutually advantageous partnerships.
- Develop and facilitate a process for engagement with internal stakeholders, including Board of Trustees, Staff, and Montgomery and Floyd County government leaders, to gather input and identify library service trends and ideas regarding relevant future service delivery.
- Conduct engagement meetings or focus groups in all four library branch service areas.
- Identify and engage with community members in portions of the service area currently not served by library facilities including Price's Fork village, McCoy/Long Shop village, and Riner village in Montgomery County, and the out-of-town areas of Floyd County.
- Create mechanisms to allow ongoing input and feedback from stakeholders.
- Meet with individuals to obtain additional information and insight as necessary.

Report and Presentation of Findings

- Prepare and present a report with executive summary and detailed findings to Strategic Planning Committee and other key internal stakeholders on:
 - all areas of analysis above
 - meaningful trends from external and internal engagement processes
 - gaps between current library operations, services and programs and stakeholder inputs
 - high level recommendations to most effectively match library operations, services and programs to stakeholder needs and interests
 - critical resources required to achieve

Strategic Plan Development

- Using findings, facilitate a working process with the Strategic Planning Committee and selected key stakeholders (community members, Library Trustees, Library Director, Management, Staff) to:
 - develop new Mission and Vision statements
 - identify essential library service priorities, goals and objectives for both the short (3-5 years) and long (10-20 years) terms, including those currently offered that continue to be relevant and those that needs to be developed to address gaps between library operations/services and identified service priorities

Strategic Plan and Communication Plan

- Prepare a dynamic and compelling MFRL Strategic Plan with Executive Summary that outlines short and long term priorities, goals, and objectives, including new Mission and Vision statements. Include additional component parts as listed below under Scope of Service Deliverables.
- Work in partnership with the Strategic Planning Committee and the Library Board of Trustees to develop a plan for marketing the final product both internally and externally.

Achievability/Gap Analysis

- Analyze organizational ability to implement Library Strategic Plan options including, but not limited to, an analysis of financial implications of strategic plan implementation.
- Prepare a gap analysis report of areas in which organizational ability does not meet needs for Plan implementation and make recommendations for increasing achievability consistent with organizational Mission, Vision and Goals – such as changes in service or service delivery, modifications to staffing model or other changes in organizational structure/capacity factors.

Ongoing Evaluation and Planning

- Provide self-assessment methodology, including appropriate tools, for ongoing strategic planning and goal achievement evaluation.

Scope of Service Deliverables

- SWOT/SOAR/PEST or other analysis of the library system
- Stakeholders Analysis
- Finding Report
- MFRL Strategic Plan, including but not limited to:
 - Executive Summary
 - Mission and Vision
 - Short and Long Term Priorities, Goals and Objectives with Timelines
 - Environmental Scan and Trends Analysis
- Communication Plan
- Achievability/Gap Analysis Report and Achievability Recommendations
- Self-Assessment/Evaluation Methodology and Tools

IV PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS:

A. GENERAL REQUIREMENTS:

1. RFP Response: In order to be considered for selection, Offerors must submit a complete response to this RFP. One (1) original and five (5) copies of each proposal must be submitted to:

Heather M. Hall, C.P.M., Procurement Manager
Montgomery County Purchasing Department
755 Roanoke Street, Suite 2C
Christiansburg, VA 24073-3179

Identify on outside of envelope: **Sealed RFP # 19-06**

RFP Due date/Opening date and hour: **May 30, 2018, 3:00 P.M.**

The Offeror shall make no other distribution of the proposal.

2. Proposal Preparations:

- a. Proposal shall be signed by an authorized representative of the Offeror. All information requested should be submitted. The Procurement Manager will review all proposals to ensure required information is included. Failure to submit all information requested may result in a request to submit the missing information. Proposals which are substantially incomplete or lack key information may be rejected as incomplete. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.
- b. Proposals will be reviewed and evaluated by a Committee as designated by the County.
- c. Proposal should be prepared simply and economically, providing a straight forward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.
- d. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, subletter, and repeat the text of the requirements as it appears in the RFP. The proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at an appropriate place or be attached at the

end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.

- e. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.
 - f. Ownership of all data, materials and documentation originated and prepared for the County pursuant to the RFP shall belong exclusively to the County and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the Offeror must invoke the protections of Section 2.2-4342D of the Code of Virginia, in writing, either before or at the time the data or other materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and will result in rejection of the proposal.
- B. SPECIFIC REQUIREMENTS:** Proposals should be as thorough and as detailed as possible so that the County may properly evaluate your capabilities to provide the required services. Please limit the length of proposal, including appendices, to 20 pages, and please limit the proposal to one bound volume. Do not include any material outside of this volume.

Part 1: Executive Summary

Respondents will provide an executive summary not exceeding two pages which summarizes key points of the proposal, including a brief restatement of the project scope and identification of any particularly challenging aspects of the project.

Part 2: Proposed Work Plan

Respondents will provide a detailed description of the planned approach to be taken by the organization to achieve MFRL's interests. At a minimum, include the methodology to be used, a draft project timeline with key milestones, stakeholders proposed to be engaged, methods for obtaining stakeholder buy-in, and plans for marketing and implementing the final product. Include reasoning as to why methods or activities have been proposed.

Part 3: Cost of Services

Respondents will provide a comprehensive and detailed budget listing as separate line items all costs and fees that will be incurred as part of the respondent's work. Tiered proposals with optional services are acceptable. So as not to unduly bias the RFP development process MFRL will not respond to queries regarding the amount budgeted for this project.

Part 4: Organizational Qualifications

Respondents will provide a brief overview of their:

- organizational description, purpose and history
- qualifications and experience in working with a) libraries and other public sector and not-for-profit organizations, b) strategic planning projects and/or related work, and c) community engagement processes.
- philosophy and vision for public library services, sharing general thoughts on 21st century public libraries, their value, and their future.

Part 5: Staff Qualifications

Respondents will provide an overview of organizational principals in charge as well as key project members with names, roles and resumes. Please provide contact information for the person to whom MFRL should direct proposal correspondence including full name, phone number, email address and physical mailing address.

Part 6: References

Respondents will list at least three clients for which similar work is or has been conducted and give the name, title and telephone number of persons who may be contacted for reference concerning the services provided. Give dates and lengths of service.

V. EVALUATION AND AWARD OF CONTRACT:

A. Award of Contract: Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposal, including price, if so stated in the Request for proposal. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, Montgomery County shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. Montgomery County may cancel the Request for Proposal or reject proposals at any time prior to an award, and is not required to furnish a statement of the reason why a particular proposal was not deemed to be the most advantageous. (Section 2.2-4359D, Code of Virginia.) Should Montgomery County determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms, and conditions of the solicitation and the contractor's proposal as negotiated. See Attachment B for sample contract form.

B. Evaluation Criteria: Proposals shall be evaluated by the County using the following criteria:

<u>EVALUATION CRITERIA</u>	<u>WEIGHT</u>
1. Executive Summary	10
2. Proposed Work Plan	20
3. Cost of Services	30
4. Organizational Qualifications	20
5. Staff Qualifications	15
6. References	5

VI RESERVATION OF RIGHTS: Montgomery-Floyd Regional Library reserves the right to award in part or in whole, to one or more vendors, or to reject any or all proposals, whichever is deemed to be in its best interest.

VII CONTRACT ADMINISTRATION:

Karim Khan, Library Director, or his designee, shall be identified as the Contract Administrator and shall use all powers under the contract to enforce its faithful performance. The Contract Administrator, or his designee, shall determine the amount, quantity, acceptability, fitness of all aspects of the services and shall decide all other questions in connection with the services. The Contract Administrator, or his designee, shall not have the authority to approve changes in the services which alter the concept or which call for an extension of time for this contract. Any modifications made must be authorized by the Montgomery County Purchasing Department through a written amendment to the contract.

VIII PAYMENT PROCEDURES: The County will authorize payment to the Contractor after receipt of Contractor's correct invoice for services rendered. Invoices shall be sent to:

Montgomery-Floyd Regional Library
Attn: June Sayers
125 Sheltman Street

Christiansburg, VA 24073

IX **CONTRACT PERIOD:** The term of this contract is a negotiated term, but MFRL would like to have a product in hand by August 31, 2018.

**ATTACHMENT A
TERMS AND CONDITIONS**

GENERAL TERMS AND CONDITIONS

http://www.montgomerycountyyva.gov/filestorage/16277/16344/16633/16661/RFP_terms_and_conditions.pdf

SPECIAL TERMS AND CONDITIONS

1. **ADVERTISING:** In the event a contract is awarded for supplies, equipment, or services resulting from this solicitation, no indication of such sales or services to Montgomery County will be used in product literature or advertising. The Contractor shall not state in any of the advertising or product literature that the Commonwealth of Virginia or any agency or institution of the Commonwealth has purchased or uses its products or services.
2. **AUDIT:** The Contractor hereby agrees to retain all books, records, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. Montgomery County, its authorized agents, and/or State Auditors shall have full access to and the right to examine any of said materials during said period.
3. **AVAILABILITY OF FUNDS:** It is understood and agreed between the parties herein that Montgomery County shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.

4. **CANCELLATION OF CONTRACT:** Montgomery County reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the Contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.

5. **IDENTIFICATION OF PROPOSAL ENVELOPE:** The signed proposal should be returned in a separate envelope or package, sealed and addressed as follows:

Montgomery County
Purchasing Department
755 Roanoke Street, Suite 2C
Christiansburg, VA 24073-3179

Reference the opening date and hour, and RFP Number in the lower left corner of the envelope or package.

If a proposal not contained in the special envelope is mailed, the Offeror takes the risk that the envelope, even if marked as described above, may be inadvertently opened and the information compromised which may cause the proposal to be disqualified. No other correspondence or other proposals should be placed in the envelope. Proposals may be hand delivered to the Montgomery County Purchasing Department.

6. **INDEPENDENT CONTRACTOR:** The contractor shall not be an employee of Montgomery County, but shall be an independent contractor. Nothing in this agreement shall be construed as authority for the contractor to make commitments which shall bind Montgomery County, or to otherwise act on behalf of Montgomery County, except as Montgomery County may expressly authorize in writing.

7. **INSURANCE:**

By signing and submitting a proposal under this solicitation, the Offeror certifies that if awarded the contract, it will have the following insurance coverages at the time the work commences. Additionally, it will maintain these during the entire term of the contract and that all insurance coverages will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

During the period of the contract, Montgomery County reserves the right to require the Contractor to furnish certificates of insurance for the coverage required.

INSURANCE COVERAGES AND LIMITS REQUIRED:

- A. Worker's Compensation - Statutory requirements and benefits.
- B. Employers Liability - \$100,000.00
- C. General Liability - \$500,000 combined single limit. Montgomery County and the Commonwealth of Virginia shall be named as an additional insured with respect to goods/services being procured. This coverage is to include Premises/Operations Liability, Products and Completed Operations Coverage, Independent Contractor's Liability, Owner's and Contractor's Protective Liability and Personal Injury Liability.
- D. Automobile Liability - \$500,000.
- E. Professional Liability/Errors and Omissions \$1,000,000 occurrences, \$3,000,000 aggregate

Profession/Service

Accounting

Limits

\$1,000,000 occurrences, \$3,000,000 aggregate

The contractor agrees to be responsible for, indemnify, defend and hold harmless Montgomery County, its officers, agents and employees from the payment of all sums of money by reason of any claim against them arising out of any and all occurrences resulting in bodily or mental injury or property damage that may happen to occur in connection with and during the performance of the contract, including but not limited to claims under the Worker's Compensation Act. The contractor agrees that it will, at all times, after the completion of the work, be responsible for, indemnify, defend and hold harmless Montgomery County, its officers, agents and employees from all liabilities resulting from bodily or mental injury or property damage directly or indirectly arising out of the performance or nonperformance of the contract.

8. **PROPOSAL ACCEPTANCE PERIOD:** Any proposal received in response to this solicitation shall be valid for (90) days. At the end of the (90) days the proposal may be withdrawn at the written request of the Offeror. If the proposal is not withdrawn at that time it remains in effect until an award is made or the solicitation is cancelled.

**ATTACHMENT B
COUNTY OF MONTGOMERY
STANDARD CONTRACT**

Contract Number:

This contract entered into this ___ day of, 201__, by _____ hereinafter called the “Contractor” and Montgomery-Floyd Regional Library, called “MFRL”.

WITNESSETH that the Contractor and Montgomery-Floyd Regional Library, in consideration of mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF SERVICES: The Contractor shall provide the services to Montgomery –Floyd Regional Library as set forth in the Contract Documents.

CONTRACT PERIOD: The initial contract period is _____ through _____.

COMPENSATION AND METHOD OF PAYMENT: The Contractor shall be paid in accordance with the Contract Documents.

CONTRACT DOCUMENTS: The Contract Documents shall consist of signed Contract, the statement of need, general terms and conditions, special terms and conditions, specifications, and other data contained in this Request For Proposal Number, dated _____, together with all written modifications thereof, the proposal submitted by the Contractor dated _____ and the Contractor’s letter dated _____, all of which contract documents are incorporated herein.

In **WITNESS WHEREOF**, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:

Montgomery-Floyd Regional Library:

By: _____ By:

Title: _____ Title: