

Request for Proposal (RFP)

Strategic Planning for Anderson Public Library (APL)

Issue Date: January 31, 2025

Due Date: March 10, 2025

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1. General Information

1.1 Timeline

The timeline supplied is APL’s best estimate and is not binding on the Library.

RFP Issued	January 31, 2025
<u>Open Q&A for potential vendors</u>	February 14, 2025
DEADLINE FOR VENDOR QUESTIONS	February 24, 2025
PROPOSAL DUE	March 10, 2025
Library Decision and Recommendation to Library Board of Trustees	March 19, 2025
Selected Vendor Notification	March 20, 2025
Estimated Contract Start	April 2025

All questions must be emailed and directed to Edra Waterman, ewaterman@andersonlibrary.net

A complete listing of all Vendor questions relating to this RFP along with APL responses will be provided to each Vendor via email written addendum.

1.2 Statement of Purpose

This Request for Proposal (RFP), issued by Anderson Public Library (hereby referred to as “APL” or “the Library”) is for a strategic planning process, including all relevant research, community outreach, and document creation. (“Services.”)

1.3 Library Information

Anderson Public Library (APL) is located in Madison County in East-Central Indiana and serves a diverse population of 69,817 residents across Anderson City, Anderson, Stony Creek, and Union Townships in Madison County, Indiana. The majority of these residents (80+%) live in the City of Anderson proper.

APL has two locations, the Main Library and Lapel Branch Library. Main Library is a 100,000+ square foot facility in downtown Anderson open 65 hours per week. Lapel Branch Library is a ~8,000 square foot facility in the small town of Lapel on the east side of APL’s taxing district, with hours soon to be expanded from 28 to 48 hours per week.

The library is committed to providing exceptional service. Recently, the library conducted an internal staff needs-assessment to develop a comprehensive plan that fosters a supportive and rewarding work environment, empowering staff to excel in their service to the community.

In 2024, APL served 34,671 cardholders, circulating ~630,000 items with an operating budget of ~6M, and a staff of 58.

Anderson, like many communities, faces ongoing challenges stemming from economic shifts, including an increasing unhoused population and aging infrastructure. APL is dedicated to adapting and evolving to meet the needs of its community.

1.4 Proposal Evaluation & Selection Criteria

An Evaluation Committee shall review all proposals to determine which Vendors have qualified for consideration.

APL reserves the right, at its sole discretion, to request clarifications of proposals or to conduct discussions for the purpose of clarification with any or all Vendors. The purpose of any such discussions shall be to ensure full understanding of the proposal. If clarifications are made as a result of such discussion, the Vendor shall put such clarifications in writing.

The selection of the winning proposal will be based on a numerical scoring system. All proposals will be assigned a score for each item/category as outlined in the following table. Upon receipt of the proposals, an evaluation team will determine the proposals most qualified based on the following criteria:

Suitability of proposal to meet stated goals. Library staff will score proposals according to how each individual requested component is met by the proposal. The top three scoring vendors will be presented to the Strategic Planning committee of library board with a staff recommendation for the winning vendor, and the committee will review the proposals and determine a final recommendation to make to the full Board. Scoring rubric can be found at the end of this document.	40%
Cost	20%
Vendor experience and capability	30%
Clarity and completeness of the submitted proposal	10%

APL reserves the right to select the Vendor deemed most suitable, which may or may not be the lowest cost Vendor.

2. Description of Requirements

2.1 Strategic Planning Components

Project Overview and Scope of Work

APL seeks to develop a comprehensive strategic plan that aligns its services with the needs and aspirations of its community. This plan should engage deeply with various community stakeholders, both individual and organizational, to result in an updated mission, vision, strategic priorities, and goals that serve as a guiding framework for designing and delivering innovative and meaningful services and resources.

Measurability is crucial. APL seeks metrics to measure organizational success, not just project checklists. The successful vendor should help identify such metrics and create a dashboard or annual work plan process for staff. These metrics will assess library progress and may also serve as potential components of individual staff performance within a performance-based compensation system.

The process and strategic plan should be community-centric, involving input from the community, staff, and board members. The board will approve the final plan developed.

Project Structure

The project should achieve the following phase structure and deliverables to be considered complete.

Research Phase: The Vendor will provide APL with a data package and statistical overview that is intended to increase APL's understanding of the context in which it operates, locally and nationally. The research phase should make use of data already collected by various other public organizations (schools, government, etc.) wherever possible. The methodology should include but is not necessarily limited to:

- A.1. Demographic study
- A.2. Growth projections
- A.3. APL usage trends
- A.4. Identification of 5-10 peer libraries for benchmarking purposes

Feedback Phase: The Vendor will provide APL with a plan to collect feedback from a broad, diverse set of community stakeholders, to be used in building goals and strategies. The feedback phase should include an assessment of how aware the public and stakeholders

are/were of the previous strategic plan and/or library resources and programs. The methodology for this might include but is not necessarily limited to:

- B.1. In-person meetings for the general public and/or affinity groups
- B.2. Community partner meetings/interviews
- B.3. Survey tool
- B.4. Strategy for reaching non-patrons

Mission Phase: The Vendor will outline and facilitate a process resulting in the development and articulation of an updated APL Mission and Vision

Document Phase: The Vendor will, with input from appropriate APL staff and library board, facilitate the creation of a set of final Strategic Plan documents, including but not necessarily limited to:

- C.1. A plan for presentation of progress to date to the library Board
- C.2. Creation of a draft dashboard tool and/or annual workplan format to track ongoing progress on the Strategic Plan
- C.3. Creation of a draft Strategic Plan document for review by APL staff and board
- C.4. Creation of a final Strategic Plan document that incorporates feedback from APL staff and board

Communication Phase: The Vendor will assist APL in developing a communication plan after the Strategic Plan is finalized.

One (1) electronic PDF copy of the proposal shall be submitted via e-mail to Edra Waterman.

Proposals received beyond the deadline of March 10, 2025 will not be opened.

Proposals should be addressed to:

Edra Waterman
Director
ewaterman@andersonlibrary.net

Responses shall follow the format laid out in Section 3: Proposal Format.

Any costs associated with the preparation and delivery of this proposal will be borne solely by the Vendor.

2.2 Liability

Any contract for services shall include the following indemnification language. Vendors acknowledge that submitting a proposal indicates their willingness and ability to contract with APL under these terms:

Contractor agrees to indemnify and hold harmless Anderson Public Library and its officers, officials, employees and volunteers from and against all claims, damages, losses and expenses

including attorney's fees arising out of the performance of the work described herein caused by any negligence, recklessness, or willful misconduct of the Contractor, any subcontractor, anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable.

The parties expressly agree that any payment, attorney's fee, costs or expense APL incurs or makes to or on behalf of an injured employee under APL's self-administered workers' compensation is included as a loss, expense or cost for the purposes of this section, and that this section will survive the expiration or early termination of this Agreement.

2.3 Responses to the RFP

Proposals will only be accepted from a single firm, not from joint ventures. When two or more Vendors desire to submit a single proposal, they shall do so as prime/subcontractor(s).

Vendors may not use omissions or errors in the Specifications or other contract documents to their advantage. APL reserves the right to issue new instructions correcting any such errors or omissions, which new instructions shall be treated as if originally included.

APL may make any investigation it deems necessary to determine the ability of the Vendor to perform the work. Vendors shall furnish information for this purpose to APL upon request. APL reserves the right to reject any proposal if the evidence submitted by, or other investigation of, the Vendor fails to satisfy APL that the Vendor has the proper qualifications, experience, manpower, or financial and managerial capability to carry out the obligations of the contract agreement or to perform the work as specified.

A Vendor may withdraw a proposal in writing to Library prior to deadline for proposal receiving.

2.4 Negotiation

The Vendor acknowledges APL's right to reject any and all proposals and to waive any formality or irregularity in any proposal received. The Vendor recognizes APL's right to reject any proposal which fails to submit the data required by the RFP or is in any way incomplete or irregular. An award to the lowest Vendor is not required.

Library reserves the right to enter into negotiation with one or more Vendors. Library reserves the right to waive any informality as may be permitted by law. Library reserves the right to award multiple contracts for different portions of the work, or to reject all proposals.

2.5 Contract Documents

Each Vendor shall examine the RFP carefully. Any interpretation or correction will be issued as an Addendum by APL. Only a written interpretation or correction by Addendum shall be binding. Addenda are written or graphic instruments issued prior to proposal receiving which modify or interpret the RFP, including specifications, additions, deletions, clarifications or corrections. Prior to proposal receiving, APL will send any Addenda to each Vendor in writing.

The successful responder will be expected to enter into a contract with Library pursuant to the documents that include the RFP, the Vendor's proposal, the summary of negotiation, and any and all other additional materials submitted by the Vendor. The selected Vendor may be requested to submit copies of their applicable standard contract forms.

The only official answer or position of Library will be the one stated in writing.

2.6 Prices

Vendor will also provide a detailed quote sheet using the format provided in Section 3.4.

Unit and extended prices must be quoted in U.S. Dollars for any additional and necessary or recommended services.

No Vendor will be allowed to modify or resubmit its proposal, for any reason whatsoever, after the specified due date.

3. Proposal Format

Proposals must be structured, presented, and labeled as described in this section.

Failure to follow the specified format, to label the responses correctly, or to address all of the subsections may, at APL's sole discretion, result in the rejection of the Proposal.

Proposals should be printable on standard 8 1/2" x 11" paper. All proposal pages should be numbered.

3.1 Cover Letter

The proposal must include a cover letter that provides the following:

1. Vendor's legal name and corporate structure;
2. Vendor's primary contact to include name, address, phone, and email;
3. Identification of any subcontractors and scope of work to be performed by subcontractors;
4. Identification of any pending litigation against the Vendor;
5. Disclosure of any bankruptcy or insolvency proceedings in last ten (10) years;
6. Statement of the Vendor's credentials to deliver the services sought under the RFP;
7. Statement indicating the proposal remains valid for at least 180 days;
8. Statement that the Vendor or any individual who will perform work for the Vendor is free of any conflict of interest
9. Signature of a company officer empowered to bind the Vendor to the provisions of this RFP and any contract awarded pursuant to it.
10. The proposal cover letter should be concise and brief and not exceed two (2) pages.

3.2 Table of Contents

All pages are to be numbered and figures, tables, charts, etc. must be assigned index numbers and identified in the Table of Contents.

3.3 Overview of Services

Provide a brief and concise synopsis of the proposal and a description of the Vendor's credentials to deliver the services sought under the RFP.

3.3.1 General Project Plan

1. **WORK PLAN** Provide a detailed narrative on how your company plans to provide a well-designed planning process including:
 - a) Project plan that specifically describes how the Vendor intends to successfully complete the project. The project plan should clearly identify all of the tasks and activities the Vendor will complete to successfully provide the services requested in this RFP.
2. **PROJECT PLANNING AND MANAGEMENT** Describe the planning and management skills your company will employ to ensure the prompt meeting of deadlines as they pertain to the project phases defined above.
3. **PROJECT TIMELINE** Provide a project timeline and schedule for completion of all activities, that should demonstrate all work should be completed by **December 17, 2025**.

3.3.2 Deliverables and Completion

The proposal should address how the Vendor proposes to meet each deliverable and project component in section 2.1, or propose alternatives as outlined in Section 3.3.3.

3.3.3 Exceptions

If the Vendor's specifications for providing services are in any respect not the equivalent of the components in the RFP, please provide a description of those exceptions. Vendors are invited to propose, and APL will consider, reasonable modifications to the project deliverables and components. Please note any impact to pricing that the proposed modifications will effect.

If the Vendor is able to provide all requirements as specified in section 2.1, note "None."

3.4 Cost Schedule and Payment

Vendor will provide a Cost Proposal that shall present a total fixed price to perform all of the requirements of the RFP as well as pricing for each individual component.

The payment schedule for the project will be agreed upon in the final contract.

3.5 References

The Vendor must supply three references for similar work it has undertaken over the past five years, preferably with a library, school, public/government or other community-based organization.

Provide the company/organization name; contact name(s); email address; telephone number; and a brief description of the work performed.

Failure to provide the above information may result in the Vendor being disqualified and its proposal not considered. Library reserves the right to contact any and all references to obtain information without limitation and regardless of the Vendor’s performance on the listed jobs.

3.6 Declaration and Signature

DECLARATION:

The undersigned hereby declares the proposal specifications have been carefully examined and this proposal is submitted in compliance therewith. The undersigned understands that competence and responsibility, time of completion, as well as other factors of interest to APL may be a consideration in making the award. APL reserves the right to reject any and all proposals, to accept or reject alternate proposals and unit prices, and waive technicalities concerning the proposals received as it may be in APL’s best interest to do so.

AUTHORIZED REPRESENTATIVE:

Authorized Representative’s Name	Title
Authorized Representative’s Signature	Date
Company	Telephone
Street Address	E-Mail

Addendum A - Scoring Rubric

Project component	Maximum points	Points awarded	Staff comments
Research Phase	15		
Feedback	40		
Mission/Vision	20		
Documents	20		
Communication Plan	5		
Totals	100		