



**Request for Proposal
Strategic Plan Consultant
Qualifications and Price
Issued: October 1, 2024**

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1.0 General Overview

The Selwyn Public Library is in the process of developing a new strategic plan covering the period of 2026 – 2030. The initiative is being led by the library board of directors, who have delegated the initial development to a strategic plan subcommittee. The committee is seeking the services of a consulting firm to conduct research and prepare a report on specific aspects of the plan that includes conducting an environmental scan of comparable Public Library operating trends and best practices; surveying key stakeholders and members of the public and developing a report detailing findings; and hosting a public consultation to solicit ideas about future direction of the Library.

The Selwyn Public Library currently operates three (3) branches across Selwyn and added a Makerspace in 2022 adjacent to the Lakefield Branch.

With an annual operating budget of approximately \$945,000, Selwyn Public Library employs a team of 7 staff (6 FTE) and relies on approximately one hundred and fifty (150) volunteers for day-to-day operations. The Library operates under the direction of a Board and the Public Libraries Act of Ontario and is autonomous in its decision-making. The primary funder of the Library is the Township of Selwyn.

2.0 The Project – Scope of Work

2.1 Details

The Selwyn Public Library is seeking an experienced, professional Consultant to undertake the following general requirements:

- Facilitate the strategic planning process using a methodology effective for public libraries.
- Design an effective method for data gathering and presenting, which will include community surveys and focus groups to identify needs over the next four-year period.
- Create a local profile for Selwyn Public Library and its current and future users.
- A trend analysis of the local profile data that assists the Board in determining the key roles the library has in the community.
- Facilitate meetings of the planning committee, community stakeholders, and library staff.
- Identify service priorities, gaps, goals objectives, and activities.

Detailed deliverables include the following:

2.1.1 Comprehensive Data Collection and Analysis

- a) Gather data through community research that focuses on library users, non-users, and stakeholders – including Library Board and

- Staff – to identify library needs and wants, as well as ways to increase library usage and cardholder registration.
- b) Review of current strategic plan, Lakefield Feasibility Study, Board Legacy document, annual reports, and relevant policies.
 - c) collected from Selwyn Township comparators and from libraries in Ontario serving a similar-sized population to identify gaps and needs.
 - d) Perform a public library environmental scan to identify trends and issues impacting public libraries now and in the future.
 - e) Undertake a trend analysis of the local profile data that assists the Board and Management in determining the key roles the library plays within the community
 - f) Assess current collaboration with other community partners, including but not limited to non-profit organizations, local businesses, schools, and social service providers and develop strategies to enhance relationships and promote library

2.1.2 Stakeholder Facilitation and Community Engagement

- a) Facilitate Board, Staff, and Volunteer sessions that solicit consensus on the top service priorities that the library needs to focus on in the next five years. This should include:
 - i. Strategic visioning session with full Board and Staff Team.
 - ii. Special meeting of Town Council.
 - iii. Staff engagement discussions with representatives from across the organization.
- b) Facilitate discussions with community stakeholders, including residents and business owners to determine what type of public library services they expect to receive from the Selwyn Public Library now and over the next five years.
- c) Work with library management to offer a wide range of engagement methods to determine needs, wants, and priorities. These could potentially include but are not limited to:
 - i. Web forms/surveys
 - ii. Interactive online engagement (such as Bang the Table)
 - iii. Social media
 - iv. Suggestion boxes

2.1.3 Report Services

All raw and summary data is to be delivered to the Selwyn Public Library at the conclusion of the planning process. This should include but is not limited to the following:

- a) Local demographic profile
- b) Statistic data profile assessing library services provided in Selwyn
- c) Comparison of public libraries in Ontario serving a similar sized population

- d) Environmental scan of public libraries
- e) SWOT or Trend analysis
- f) Summary of Board, Council, Staff, and Volunteer sessions
- g) Summary of community stakeholder meetings
- h) Summary of surveys and focus group discussions
- i) Current financial assessment and future funding strategy
- j) Community collaboration assessment and future strategy

2.2 Project Team

The Project Team will consist of identified representatives from the consultant and Library Board/Committee members, CEO/Chief Librarian, Other Township staff will participate as necessary throughout the project.

The CEO/Chief Librarian shall serve as the lead point of contact for the Library and shall work with the successful consultant to organize meetings, provide feedback and act as a clearinghouse on all Township information to and from the consultant.

2.3 Project Timetable/Deliverables

Event Detail	Date
Project Commencement	January 2025
Data Collection, Analysis, Community Consultation, Project Team Meetings	Q1 2025
Review Findings & Draft Report with Project Team	Q2 - 2025
Community/Stakeholder Feedback on Draft Report	Q2 - 2025

Throughout the contract period, the consultant shall update the project work plan and schedule to show progress in weekly increments and submit to the Library with their monthly status report.

It is imperative that the schedule is kept on track and the Project is successfully completed according to schedule.

3.0 Information Required – Qualifications/Work Plan

A response to each of the following questions in a clear and comprehensive manner is required.

- i. Provide the full firm name and main office address.
- ii. Describe the Firm’s understanding of the Project – Scope of Work and approach to complete the project and how it will achieve the timetable.
- iii. Set out the various components of their proposed study and their study timelines demonstrating that they will achieve the Project Timelines as stated herein.

- iv. Identify the personnel who would take the lead position in this request and set out their particular qualifications and experience in carrying out this type of work.
- v. Complete Schedule “A” – Qualifications and Price Declaration.

4.0 Information Required – Proposal

A response to each of the following areas in a clear and comprehensive manner is required.

- i. Provide a confirmed price for the project.
- ii. Provide an expected payment schedule.
- iii. Specifically identify any additional work or services that exceed the services requested herein and the associated costs thereof.

5.0 Schedule of Events

Item	Date
Proposal Call, Qualifications and Price	October 1, 2024
Receipt of Proposal Submission	October 30, 2024
Completion of evaluation and scoring of the submissions with a report and recommendation to the Council (November 25, 2024 Library Board Meeting)	November 25, 2024
Anticipated date to accept a Proposal or reject all	November 29, 2024

Each respondent shall submit an **Original and two (2) copies** of their qualification information, the completed Schedule "A" and other requested respondent proposal information no later than **11:59:59 am (according to the circulation desk lobby clock) October 30, 2024** to the Selwyn Public Library as follows:

Delivery Address (do not mail - courier or hand delivery only)

Selwyn Public Library
 836 Charles Street,
 Bridgenorth, Ontario K0L 1H0

The outside of the shipping carton/envelope must be clearly marked with the following;

1. “Strategic Plan Consultant”

2. Respondent's name
3. Respondent's mailing address

Any Proposal received after the above deadline will be returned unopened to the respondent.

Opening of the RFP Submissions will take place at the Selwyn Public Library, 836 Charles Street, Bridgenorth, Ontario at **12:05 pm October 30, 2024**

6.0 Scoring of Qualifications and Price

The evaluation of the Qualifications and Price will be carried out by an evaluation committee with a recommendation brought forward to the Library Board. The Library Board will make its decision based on information gathered during the procurement process and the evaluation criteria outlined in this section. Failure to provide relevant information may result in penalties being assessed on the evaluation score. **Contact with Library Board members and/or Council members is prohibited and can be considered as grounds for disqualification from the selection process.**

6.1 Evaluation Criteria

Proposal submissions will be evaluated and scored according to the rating scheme indicated in Table I.

Criteria	Maximum Points	Points Scored
1. Respondent Profile and Experience <ul style="list-style-type: none"> • Complexities and size of projects • Number of projects of similar size and complexity • Number of employees directly involved in projects • Years of experience • Corporate depth and resources • Other relevant experience 	25	
2. Detailed Work Plan <ul style="list-style-type: none"> • Understanding of the Project • Creativity: <ul style="list-style-type: none"> • Innovation • Methodology • Approach 	35	

<ul style="list-style-type: none"> • Clarity of presentation of services to be provided • Reference Checks • Timing • Experience in meeting set schedules 		
4. Price	40	
Total Score	100	

7.0 Submission Details and Questions

Please complete and submit two (2) printed submissions of the Qualifications/Work Plan and Price Proposal information required in sections 3 and 4 above.

If the Firm has questions concerning this document, finds discrepancies or omissions in the document, or requires clarifications, such matters shall be submitted in writing to:

Sarah Hennessey
CEO/Chief Librarian

Telephone (705) 292-5065
Fax (705) 292-6695
E-mail shennessey@mypubliclibrary.ca

The Library reserves the right to request additional data or information after the Proposal date, if such data or information is considered pertinent, in the Township's sole view, to aid the review and decision making process. The Library reserves the right to supplement, add to, delete from and change this solicitation document and will so advise of any changes that are made by e-mail.

Schedule "A"
(Schedule to be completed and returned)
Qualifications and Price Declaration

Information to the Proposal Respondent

In order for the Qualifications/Work Plan and Price Proposal to be complete, a complete response to Sections 3 and 4 Information Required – Qualifications/Work Plan must be provided and the Qualifications and Price Declaration - Schedule "A" - must be completed and all other information as requested in the Proposal must be provided.

Proposal Price

Prices shall be in Canadian Funds.

Total Project Cost (please break down cost of all items)

Data collection:	\$ _____
Stakeholder facilitation:	\$ _____
Report services:	\$ _____

Sub-Total- NET \$ _____

HST \$ _____

Grand Total \$ _____

Payment Details

Draws against the contract value shall be submitted monthly. Approved draws will be paid by the Township by the middle of the following month. A "proper invoice" shall mean a written bill or other request for payment issued by the firm for services and/or materials comprising the work performed. The proper invoice shall be directed to shennessey@mypubliclibrary.ca

Declaration

1. I/WE DECLARE that this Proposal is made without any connection, knowledge, comparison of figures or arrangements with any other company, firm or person making a Proposal for the same purchase and is in all respects fair and without collusion or fraud.
2. I/WE DECLARE that all matters stated in the submitted Proposal are in all respects true.
3. The undersigned have carefully read the Requirements as per the Request for Proposal, and have satisfied ourselves as to the conditions under which the transaction and subsequent items to be supplied, and do hereby submit a Proposal to the Selwyn Public Library for a Strategic Plan Consultant.
4. I/WE acknowledge that _____ addenda have been received and that it is my/our ultimate responsibility to ensure all addenda issued have been received.
5. If selected as the successful respondent, I/We agree to abide by the terms as set out in the Request for Proposal Qualifications and Price with its Specifications and provisions for the price shown.
6. The Firm shall deliver a certified copy of the its' Public Liability and Property Damage Insurance, and where applicable the respondent shall carry standard automobile and non-owned automobile liability insurance Policy for the works, within ten (10) working days of receiving the Acceptance Notice. Coverage shall be at least \$2,000,000.00 per incident, with the Township of Selwyn named as insured. Additional coverage may be required.

The Firm will be required to submit proof of Workplace Safety Insurance Board Coverage, within ten (10) working days of receiving the Acceptance Notice and shall provide additional certificates as often as is deemed necessary by the Township during the term of the contract to ensure continued good standing with the Workplace Safety & Insurance Board.
7. The price submitted shall be firm for a period of not less than ninety (90) calendar days from the closing date of this Request for Proposal.

Dated at _____ this _____ day of _____ 2024

) _____
)
) Signature

