



Request for Proposals

2021-2023 Strategic Plan Focus Group Facilitator

The Indianapolis Public Library

A. INTRODUCTION

The Indianapolis Public Library ("IndyPL") is requesting proposals from qualified, experienced strategic planning consultants with experience in diversity, equity, and inclusion ("DEI") initiatives to work with IndyPL's Strategic Planning and Assessment Officer ("SP Officer") and provide strategic planning focus group facilitation services for the development of the 2021-2023 IndyPL Strategic Plan ("Plan"). The goal of the strategic plan process is to create a strategic plan incorporating a balanced scorecard approach and strategy mapping with a clear focus, priorities, and measurable metrics.

This RFP describes the Services to be performed and contains an overview of the terms under which Services are to be provided.

B. REQUIRED SERVICES

Focus Group Facilitation

As part of the Plan process, several focus groups consisting of community members and representatives of various organizations will be held around the city. The focus groups are central to ensure the Plan accurately reflects the community's suggestions, wants, and needs. The consultant will lead the facilitation of these focus groups. Approximately twelve (12) community member focus groups and no more than four (4) organization focus groups will be held. The selected consultant will:

- Lead in the facilitation of up to sixteen (16) focus groups
- Assist in the identification of organizational leaders to participate in the focus groups
- Identify the locations of the focus groups
 - Focus groups should not occur at a Library location
- Provide the focus groups with data provided by the SP Officer
- Compile notes and comments from focus group discussions
- Provide full focus group notes to the SP Officer
- Identify and summarize the common themes from the focus groups
- Provide an equity lens, the importance of equity, and equity context for each focus group
- Ensure the focus groups are inclusive of diverse community voices and perspectives
- Ensure groups are aware of services IndyPL currently provides and, if appropriate, inquire as to how to improve current services
- Prioritize community member and community partner input

The goal of the facilitation is to ensure a non-partisan, inclusive, informed, and respectful conversation to acquire the suggestions, needs, and wants of the Indianapolis community and IndyPL partners.

Timeline

The Plan process is already underway. The Plan Steering Committee ("Committee"), comprised of IndyPL staff, begins meeting in late February 2020 and will continue through September 2020 at the

latest. The information obtained from the community and organization focus groups needs to be obtained, compiled, analyzed, and the total data and information shared with the SP Officer and common themes identified by the Consultant no later than June 8, 2020.

C. PROPOSAL INFORMATION

1. Request For Proposal - IndyPL is seeking proposals from prospective Consultants who have the potential to furnish the requested Services. Upon request, each prospective Consultant will receive one copy of the RFP from the Library. Prospective Consultants are responsible for making additional copies as required to satisfy their needs. Consultants are encouraged to initiate preparation of proposals immediately upon receipt of this RFP so that all relevant questions and information needs can be identified and answered, and so adequate time is available to prepare a comprehensive and complete response. Questions and clarification inquiries concerning this RFP must be received prior to **February 13, 2020**. A complete list of all questions submitted to IndyPL and their subsequent responses shall be provided to each prospective Consultant.

2. Point of Contact - All communication with IndyPL must be directed to the single Point of Contact ("POC") for this project, as follows:

Garrett Mason
Strategic Planning and Assessment Officer
Indianapolis Marion County Public Library
2450 North Meridian Street
Indianapolis, Indiana 46208
Phone: (317) 275-4015
Email: gmason@indypl.org
Fax: (317) 269-5220

3. Schedule of Activities - The following table outlines the tentative schedule of major activities for the RFP and Proposal selection processes. IndyPL reserves the right to amend the schedule as necessary.

Event	Date
Issue the RFP	January 31, 2020
Cutoff date for questions	February 13, 2020
Proposal Submission Deadline	February 24, 2020
Proposal evaluations	February 25 – February 28, 2020
Final Consultant selection	March 2, 2020
Notification of Award	March 2, 2020
Final Services Agreement signed by	March 13, 2020
Agreement fully operational by	March 13, 2020

4. Consultant Rights - All materials submitted in response to this RFP become the property of IndyPL upon delivery and shall be appended to any formal documentation, which would further define or

expand the contractual relationship between IndyPL and the Consultant. Each Consultant, as an express condition for IndyPL's consideration of such Consultant's proposal, agrees that the contents of every other proposal is confidential, proprietary and trade secret information in all technical areas and waives any right to access to such proposals. No submissions or supporting documentation will be returned to Consultant.

Consultants submitting proposals should recognize that IndyPL is a public body and, as a public body, IndyPL is subject to disclosure requirements and must abide by public record laws. Neither party shall be liable for disclosures required by law.

5. Reservation of Rights - This RFP does not commit IndyPL to award a Services Agreement, to pay any costs incurred in the preparation of a proposal to this request, or to otherwise contract for any services.

IndyPL reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with any qualified sources, or to cancel in part or in its entirety this RFP, if it is in the best interest of IndyPL to do so.

IndyPL will evaluate proposals based upon the effectiveness of the perceived performance as it relates to IndyPL's specific requirements. The lowest fee Proposal shall not necessarily be selected. IndyPL specifically reserves the right to reject any or all Proposals or any part thereof; or to waive any defects or informalities in a Proposal when it is determined by IndyPL to be in the Library's best interest.

6. Late Proposals Not Considered - Proposals received after the stipulated Proposal Submission Deadline will not be considered.

7. Inconsistency or Error in the RFP - Any Consultant believing that there is any ambiguity, inconsistency or error in the RFP shall promptly notify the Library in writing of such apparent discrepancy. Failure to so notify IndyPL by the Proposal Submission Deadline will constitute a waiver of claim of ambiguity, inconsistency or error.

8. Consultant Errors or Omissions - IndyPL is not responsible for any Consultant's errors or omissions.

9. Addenda - IndyPL shall not be responsible for any oral instructions given by any employees of the Library in regard to the proposal instructions, specifications or proposal documents as described in this RFP. Any changes will be in the form of an addendum, which will be furnished to all Consultants who are listed with IndyPL as having received the RFP, or to any other Consultant who requests an addendum.

10. Consultant Incurred Costs - The Consultant shall be responsible for all costs incurred in preparing or responding to this RFP. All materials and documents submitted in response to this RFP become the property of IndyPL and will not be returned after the Proposal Submission Deadline.

11. Modification or Withdrawal of Proposal - A proposal may not be modified, withdrawn or cancelled by a Consultant for one hundred eighty (180) days following the Proposal Submission Deadline and each Consultant so agrees in submitting the proposal.

Proposals may be withdrawn, altered and/or resubmitted at any time prior to the submission deadline.

Notice of pre-submittal date withdrawal must be in writing over the signature of the Consultant or may be by telegram, telex or FAX.

If by telegram, telex or FAX, written confirmation over the signature of the Consultant must have been mailed and postmarked on or before the Proposal Submission Deadline.

Withdrawn proposals may be resubmitted up to the Proposal Submission Deadline, provided that they are then fully in conformance with these general terms and conditions.

12. Rejection of Solicitation Responses - IndyPL reserves the right to reject any or all responses received, or any part thereof; to accept any response or any part thereof; or to waive any informality when it is deemed to be in IndyPL's best interest. Any Consultant objecting to the rejection of a proposal, or portion thereof, must submit a written protest stating the reasons for the protest to IndyPL within (5) calendar days from the date of IndyPL's Notification of Award letter.

13. Consultant Certification - By submission of a Proposal, the Consultant certifies that the Consultant has not paid or agreed to pay any fee or commission, or any other item of value contingent on the award of a contract to any employee, official or current contracting consultant of IndyPL.

14. Exceptions - It is the intent of IndyPL to award a Services Agreement on a fair, competitive basis. For this reason, IndyPL may view the notation of any "Exception" in response to any material conditions or requirement of the RFP as an attempt by the Consultant to vary the terms of the RFP, which, in fact, may result in giving such Consultant an unfair advantage over other Consultants. For this reason, IndyPL will, at its option, not allow exceptions to any material requirement if, in the opinion of the Library, the exceptions alter the overall intent of this RFP, unless the exception would be of material benefit to IndyPL.

15. Library's Right to Disqualify for Conflict of Interest - IndyPL reserves the right to disqualify any Consultant on the basis of any real or apparent conflict of interest that is disclosed by the proposal submitted or any other data available to IndyPL. The right of disqualification is at the sole discretion of IndyPL. Any Consultant submitting a Proposal herein waives any right to object at any future time, before any body or agency, including but not limited to, IndyPL, or any court, to the Library's exercise of its right of disqualification by reason of real or apparent conflict of interest as determined by IndyPL.

16. Warranties - Any Consultant submitting a proposal in response to this RFP warrants and guarantees that the Consultant is fully capable of performing each and every task set forth in the proposal. No limitation or exception to this warranty provision will be acceptable to IndyPL; except, it is understood that the Consultant is not responsible for any problems in performance caused by improper acts or omissions by IndyPL.

17. Covenant Against Contingent Fees - The Consultant warrants that no person or selling agent has been employed or retained to solicit or secure the Services Agreement upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, excepting bona fide employees or bona fide established commercial or selling agencies maintained by the Consultant for the purpose of securing business.

For breach or violation of this warranty, IndyPL shall have the right to annul the Services Agreement without liability or in its discretion to deduct from fees or payments due the Consultant the commission, percentage brokerage or contingent fee.

18. Gratuities - IndyPL may, by written notice to the Consultant, terminate the right of the Consultant to proceed under the Services Agreement upon one (1) calendar day notice, if it is found that gratuities in the form of entertainment, gifts or otherwise were offered or given by the Consultant, or any agency or representative of the Consultant, to any officer or employee of IndyPL with a view toward securing or amending, or the making of any determinations with respect to the performance of such contract; provided that the existence of facts upon which IndyPL makes such findings shall be an issue and may be reviewed in any court of law. In the event of such termination, IndyPL shall be entitled to pursue the same remedies against the Consultant as IndyPL could pursue in the event of default by the Consultant.

19. MBE/WBE - Consultants, who meet the criteria of a Minority Owned Business Enterprise or a Women Owned Business Enterprise (MBE/WBE) firm or similar requirements for out-of-state firms, should provide a statement in the proposal indicating the appropriate designation. A copy of a certification by the State of Indiana or the City of Indianapolis must be included in the proposal. IndyPL extends to each individual, firm, Consultant, supplier, contractor and subcontractor an equal opportunity to compete for IndyPL business and strongly encourages voluntary utilization of disadvantaged and/or minorities to reflect both industry and community ethnic composition. It is the goal of IndyPL to achieve participation of MBE/WBE consistent with the City of Indianapolis' utilization policy in the procurement of goods and supplies, in the retention of professional services, and in the construction and renovation of facilities.

20. Proposal Fees and/or Percentages - The Consultant must submit clearly stated fees as part of the proposal.

21. Contract Period - The Services Agreement, if awarded, shall cover the period from March 13, 2020 through September 30, 2020 or an equivalent period depending upon date of the Services Agreement is awarded.

22. Protest of Award - Any person who has an objection to the awarding of the Services Agreement to any Consultant by IndyPL shall lodge that protest, in writing, with IndyPL no later than 5:00 p.m. local time of the fifth (5th) calendar day, following release of IndyPL's Notification of Award letter. IndyPL retains the right to reject all protests not filed within this time or those found to be without merit.

23. Consultant Inquiries - Any questions that arise relating to this RFP shall be directed, in writing, or via e-mail to:

Garrett Mason
Strategic Planning and Assessment Officer
Indianapolis Marion County Public Library
2450 North Meridian Street
Indianapolis, Indiana 46208
Phone: (317) 275-4015
Email: gmason@indypl.org
Fax: (317) 269-5220

24. News Releases - News releases pertaining to this service or any part of the subject shall not be made without prior approval of the Library.

25. Standard/Licensure Requirements - The selected Consultant shall provide documentation to the Library evidencing all necessary licenses (if any) to provide the Services prior to the awarding of the contract.

26. Out of State Consultants - It shall be a condition to the Services Agreement that any out-of-state Consultant that may be selected shall be duly registered and qualified to do business within the State of Indiana.

27. Award of Services Agreement - If a Consultant is selected to provide the services, the selection and engagement of the Contractor shall be contingent on Consultant entering into a Services Agreement with IndyPL. The submission of the proposal herein constitutes the agreement of any Consultant that any Services Agreement to be drawn as a result of an award herein will be prepared by IndyPL. The submission of a proposal shall further constitute the agreement of each Consultant that it will not insist on the use of standard contract agreements, documents or forms, and that it waives any demand for the use of its standard agreements. The language of the Services Agreement to be executed will be drafted under the supervision of IndyPL's attorney and shall be the controlling document. Consultants are requested, however, to submit copies of their applicable standard contract forms for information purposes.

28. Affirmative Action in Employment - Any Consultant in performing under an awarded Services Agreement shall not discriminate against any worker, employee or applicant or any member of the public because of race, creed, color, religion, gender, national origin, age or disability, nor otherwise commit an unfair employment practice. The Consultant will take affirmative action to ensure that applicants are employed, and that employees are dealt with during employment, without regard to their race, creed, color, religion, gender, national origin, age or disability.

29. E-Verify - The submission of a proposal shall further constitute the agreement of each Consultant that it will enroll in and verify the work eligibility status of all his/her/its newly hired employees through the E-verify program as defined in IC 22-5-1.7-3. A Consultant is not required to participate if the Consultant is self-employed and does not employ any employees. Any Services Agreement that may result from this proposal shall provide for required representations and certifications by Consultant regarding the E-Verify program.

E. PROPOSAL REQUIREMENTS

1. Introduction - The following guidelines are provided to ensure the equitable evaluation of competitive sealed Proposals and to contain the cost of participation to some reasonable level. Therefore, Proposals should be prepared as closely as possible in accordance with the instructions outlined in this section. The Consultant is advised to read this RFP in its entirety. Failure to read and/or understand any portion of this RFP shall not be cause for waiver of any portion of the RFP.

2. Proposal Format - The proposal shall be signed by an individual authorized to bind the Consultant and shall contain a statement to the effect that the proposal is a firm offer for a one hundred eighty (180) calendar day period from the date of the opening. The proposal shall provide the name, title, address and telephone number of individuals with authority to contractually bind the Consultant and may be contacted during the period of the Services Agreement. All fees quoted shall be firm and fixed for the full contract period and any extension.

Proposals are requested to be typewritten and on 8-1/2 x 11 inch paper for ease of evaluation. Responses should be specific and complete in every detail, prepared in a simple straightforward manner. The proposal shall be presented in the following format and include, at a minimum, all the information specified:

a. A letter of proposal submission and introduction including the name, address, telephone number and email of the Consultant submitting the proposal as well as the name of a point of contact for the Consultant shall constitute the first page of the proposal. The proposal shall be signed by an authorized representative of the Consultant and shall include the name, title, address and telephone number of the individual(s) authorized to negotiate a Services Agreement with IndyPL.

b. An executive summary highlighting the Consultant's background, experience and any service enhancements unique to the Consultant shall immediately follow the letter of proposal submission and introduction.

c. A list of previous projects and a brief description of each as well as references for each project listed accompanied by accurate contact information for all references including telephone or email addresses.

d. A specific work plan for the provision of the Services as it relates to the programs identified in the "Required Services" section herein as well as a generic work plan for the provision of Services relating to projects not yet conceived or implemented.

e. A list of proposed fees for the Services.

f. Copies of reports, forms and analysis generated as a result of the performance of similar services.

g. A copy of the Consultant's standard contract (if any) used to secure work of this nature.

h. If applicable, a certificate or statement regarding the status of the Consultant as a Minority or Women Owned Business.

i. Any additional information you feel would strengthen your submission.

3. Proposal Submittal Instructions - An original and three (3) copies of the proposal shall be sealed in a package(s) showing, in addition to the following address, the following information on the outside:

a. Consultant's Name

b. Request for Proposal entitled

c. Proposal Submission Deadline:

The proposal package shall be delivered or sent by mail to:

Garrett Mason
Strategic Planning and Assessment Officer
Indianapolis Marion County Public Library

2450 North Meridian Street
Indianapolis, Indiana 46208

4. Proposal Evaluation - Proposals will be evaluated by IndyPL. Evaluation of the proposals will include but not be limited to the following areas:

- a. Demonstrated expertise for the type of services requested and quality of the final work product;
- b. The satisfaction level of current and former clients of the Consultant for the rendering of similar services;
- c. Cost of services;
- d. Adequacy of the response to the general and specific requirements of the RFP; and
- e. Any other criteria deemed relevant by IndyPL.

RFP Scoring Rubric



**RFP for The Indianapolis Public Library 2021-2023
Strategic Plan Advisor and Facilitator**

Reviewer's Name:

Please score each firm from 1 to 10, with 10 representing the best response.

Evaluation Category	Total Possible Points	Firm 1	Firm 2	Firm 3	Firm 4	Firm 5	Firm 6
Demonstrated Facilitator Experience	10						
Demonstrated Strategic Planning Experience	10						
Demonstrated Diversity, Equity, and Inclusion Experience	10						
Satisfaction of Former Clients	10						
Relative Cost of Proposal (compared to other submissions)	10						
Adequacy of Response to Specified Required Services	10						
TOTAL	60	0	0	0	0	0	0