

BALTIMORE COUNTY PUBLIC LIBRARY
PURCHASING DEPARTMENT, FISCAL SERVICES
320 YORK RD. TOWSON, MD 21204-5179



**BALTIMORE COUNTY
PUBLIC LIBRARY**

Addendum to RFP 2025-P-03 Strategic Plan Consultant

April 24, 2025

This addendum will provide answers to questions received in regard to RFP 2025-P-03 Strategic Plan Consultant.

Respondents to the posting for Baltimore County Public Library RFP 2025-P-03 Strategic Plan Consultant have contacted us, seeking additional information. Some questions were asked by more than one individual or entity.

In keeping with the RFP process, all questions and answers are being shared with all potential proposers. Where possible, we are responding with additional information that we feel will assist in your ability to respond more completely and accurately to our RFP. In some cases, we consider the requested information to be either possibly proprietary, outside the scope of work described in the RFP, or not pertinent to formulating a responsive proposal. Responses to all questions, however, are listed below.

Other than that exception, please note that the information contained herein should be considered as clarification of the Scope of Work and not as modifying the RFP itself. The scope of work described in the RFP remains the full scope of work required of the selected contractor.

Q1. Budget

- Are you able to share any information regarding the budget for this engagement or for similar past engagements (e.g., the 2019 strategic plan)?
- What is the budget or not to exceed cost allocated to complete the strategic plan process?
- Is there an established budget for this project, or a budget from previous strategic planning efforts that we can use to inform our cost proposal?
- What is the proposed budget for this work?
- What is the maximum budget allocation for the strategic planning project (and for each phase if that has been determined?)
- What budget does BCPL have allocated for this project, or for strategic planning in general?
- Is there a budget range or ceiling for this project that you can share?
- Can you share an expected budget range for this effort?

- What is the budget for the strategic planning project?
- Is there a budget allocated to support this work?

A1. We do not currently have any budget information to share.

Q2. What are the biggest drivers motivating this planning process? What is the organization hoping to achieve from the strategic planning process?

A2. BCPL's current Strategic Plan covers FY21-26. We need a new Strategic Plan to determine where to focus our resources going forward, based on organizational capacity and community need.

Q3. Data

- How does the Library currently record and track KPIs?
- Has any work been done in the past that can be used to accelerate the execution of this project?
- Has the Library undertaken recent initiatives that would inform this project (compensation study, community engagement, DEI plans, etc.)?
- Does the Library use any market segmentation services like OrangeBoy or Claritas?
- Are there preferred survey tools? If so, will access to those tools be granted to the delivery team?
- Are there engagement platforms that BCPL already utilizes/has access to, or would you need the consultant to provide a recommendation?
- To gather feedback from a staff of 400, would the Library consider using an online survey? Suppose a survey is not acceptable for 400 employees. Would the Library be open to other methods for gathering data, such as random sampling instead of an interactive session with all 400 employees, e.g., a select number of focus groups?
- Will BCPL provide access to internal data, reports, or contacts needed for the environmental scan and engagement activities?

A3. Currently, BCPL's Operational Plan outlines specific activities the organization will take to accomplish the goals in our Strategic Plan. The Planning and Projects Department tracks the progress of these activities. BCPL completed an Equity Audit and a Compensation Study in 2022. Elements of these are part of our current Strategic and Operational Plans and will inform the new Strategic Plan.

BCPL does not currently use market segmentation services. We use Survey Monkey, which can be used to host consultant-developed surveys. We are also open to using other engagement platforms recommended by the consultant. BCPL will consider any type of staff and community engagement methods included in the proposals, but both interactive and asynchronous methods should be included. All relevant data, reports and contacts held by BCPL will be shared with the consultant. As stated in the Scope of Work, the consultant will be responsible for identifying and filling gaps in the data, and providing this raw data to BCPL in an agreed-upon format.

Q4. Stakeholder Involvement

- What individual staff position or group will lead the strategic planning process for the Library?

- Who would be involved with the strategic planning process? How many people do you envision being involved with creating the library system's strategic plan?
- Will the Library identify a Strategic Planning Committee to work with the consultant?
- Is BCPL open to convening a strategic planning committee that includes staff, board members, and external constituents to help guide and shape constituent engagement and drafting of the strategic elements?
- What types of stakeholders (internal and external) should we expect to engage with directly during the planning process? Are there any key groups or advisory bodies beyond staff and the Board that should be included?
- What level of involvement do you expect from library staff, trustees, and community stakeholders throughout the process?

A4. The Planning, Projects & Data Manager will lead the strategic planning process for the library. A team of staff and stakeholders will be convened in collaboration with the consultant. Stakeholders will consist of BCPL's staff, board and community members. They will participate through the planned engagement sessions, asynchronous engagement methods and meetings/workshops outlined in the Scope of Work.

Q5. Are there any anticipated barriers or risks (e.g., staff capacity, community engagement fatigue) that the consultant should be aware of? Is the Library aware of underserved communities that the community engagement should include, or is that information you are looking for the consultants to provide? Are there specific targets desired relative to non-user engagement? Is there a targeted number of community members BCPL seeks to engage with?

A5. There are no anticipated barriers or risks, or specific engagement targets. BCPL is aware of underserved communities and will share any relevant information with the consultant. We are also open to learning about other communities that have not already been identified.

Q6. Are there any dates scheduled during the process that need to be worked around or incorporated? (Like staff development day?) How flexible are the proposed project phases—particularly if additional time is needed to accommodate meaningful community and staff engagement? Pending more information, would an accelerated timeline be accepted?

A6. There are no known dates to be worked around. The end dates are fixed; December 2025 for the required work, April 2026 for the optional phase. The other dates included in the Scope of Work are guidelines that can be adjusted based on the details of the proposal. Any timeline that finishes within these fixed end dates will be considered.

Q7. Could you please clarify the expectations regarding the consultant's provision of translation services? Based on Baltimore County's diverse population, is it necessary for the consulting team to be bilingual?

A7. It is not necessary for the consulting team to be bilingual, however there is the potential for community engagement in languages other than English and the consultant should have some way of facilitating that.

Q8. What would be the work location for this effort? (i.e., remote, hybrid, onsite) Is the Library receptive to some of the work being performed virtually where possible? Is the consultant required to provide status reports of work completed? If so, how often? For invoicing purposes,

would BCPL accept a monthly retainer payment schedule, or do you require a detailed breakdown of hours worked and associated activities?

A8. The work will be hybrid, to include onsite and virtual consultant-facilitated staff and community input sessions, virtual and onsite consultant-facilitated meetings with stakeholders, and remote communication with the Planning, Projects & Data Manager and Project Coordinator. A regular schedule of status reports and planning team meetings will be developed at the start of the project.

Section 8. Invoicing and Terms of Payment states, "8.1 Invoices must be legibly prepared showing the full description and price of work performed." And "8.2 Progress payments may be submitted during the course of the engagement, but no more than one per month, based on hours of work completed in accordance with the nature of work performed by the Strategic Plan Consultant personnel and in the performance of work under the Contract."

Q9. Submission Process

- Is there a requirement for the consultant to be located locally or within the State of Maryland?
- Is there a page limit to this response?
- Since a physical submission is required, would BCPL consider accepting a digital version that includes live links to work samples, or should all materials—including digital content—be included in the physical submission?
- Are you open to optional services in addition to our core menu of services?
- General Instruction 2.1 says BCPL intends to "make an award to the lowest responsive and responsible bidder whose proposal best meets the needs of the Library." Can you clarify whether the basis for award is Lowest Price Technically Acceptable or Best Value? We encourage BCPL to award to the organization that provides the Best Value to BCPL. This would afford the greatest flexibility in choosing a firm with the experience to engage meaningfully with BCPL's stakeholders and deliver a sound strategic plan.
- Are the terms of the contract negotiable?

A9. The consultant does not need to be located locally or within Maryland.

There is no page limit to the response. It is permissible to upload additional information to (https://bcpl.libwizard.com/f/bid_submission_form) along with your hard copy proposal. The hard copy must present all the information that is requested in the RFP in order to be considered a responsive bid. Digital information submitted will be presented to all scorers. The proposal may include additional services and deliverables not required in the Scope of Work. See Section 7. Pricing, Page 4 for more details.

The award will go to the organization that provides the best value to BCPL. Section 6. Award, Page 3 lists specific criteria to consider when preparing a proposal. The Sample Contract Agreement (SCA) available on the BCPL website under About Us/ Bid Opportunities, describes the terms of our working relationship. (The sample is from a previous contract and some wording will need to be changed.) The general form of the SCA is to be followed. Any changes to the contract must be agreed upon by both BCPL and the vendor. It would be preferable for the bidder to alert BCPL of any major objection to the SCA when submitting the proposal. <https://www.bcpl.info/files/documents/2023-09/samplecontractagreement.pdf>

Q10. Optional Awarded Phase

- Can a vendor choose to only submit to certain phases and not the entirety of the work? Will vendors who respond to all phases be prioritized?
- Should the consultant bid on the optional work as well?
- Will the same consultant be selected for the optional work?
- Will you accept bids for the optional work only?
- The RFP states that the optional Complete Plan Development Phase must be bid separately. Is it acceptable to submit one proposal with separate workplans and fees for each phase, or do you require two completely separate proposals?
- Should the proposals for the two phases of work (Information Gathering and Framework Development and Complete Plan Development) be packaged separately (two different envelopes), or combined into one?
- What are the criteria for determining whether the selected consultant is awarded the optional Complete Plan Development Phase?
- Can you clarify your expectations for the optional Complete Plan Development Phase—specifically, how BCPL envisions the handoff from the Framework Development Phase to the full plan development if awarded? Should vendors propose an integrated approach with continuity between both phases, or treat them as distinct engagements?

A10. All vendors should submit for the Information Gathering and Framework Development Phase. The Optionally Awarded Complete Plan Development Phase is not required for a proposal to be considered and proposals including both phases will not be prioritized. If the Optionally Awarded Complete Plan Development Phase is awarded, it will be to the same vendor. The award will not be made to two different vendors for the different phases. BCPL will use the criteria listed in Section 6. Award, Page 3 when scoring the optional phase and determine if it is awarded during bid selection based on demonstrated value to BCPL.

Plans for the two phases of work can be submitted as one proposal, but the workplan and fees for each phase must be clearly delineated. If bidding on both phases, the plan for the optional phase should be integrated with the workplan for the required phase.

The addendum created will be incorporated into the final contract and must be acknowledged in all proposals. The form of acknowledgement is included in the proposal and failure to sign and submit the form may result in your proposal being rejected. (See Acknowledgement of Sample Contract and Addendum, page 18)

Dave Otto, Purchasing and Grants Specialist
Baltimore County Public Library
320 York Road
Towson, MD. 21204
tdotto@bcpl.net