

STRATEGIC PLANNING CONSULTANT
REQUEST FOR PROPOSAL RESPONSES

Firm Name	Experience in leading strategic planning processes for similar institutions	Cost	Completeness and Quality of Response	Ability to meet requested service needs	Expertise and Availability of key project personnel	References
Margaret Sullivan Studio	Extensive experience with strategic planning processes including development of library strategic plans, space planning, interior redesigns, and community engagement processes. Showed imagination, creativity, and the ability to contribute meaningfully to the process with independent ideas and multi-disciplinary approaches.	\$30,000 + expenses. Cost proposal was not detailed enough - included expenses without an estimate. Would require additional follow-up to obtain a more detailed cost breakdown + estimate of travel & materials expenses.	Highly professional presentation, conveying energy and enthusiasm for the project and process. Offered (through text and visuals) good examples of other similar projects. Included links to completed strategic plans for other library districts of similar scope and scale (as well as the capability to serve larger systems).	All elements of the process were covered in the proposal. Illustrated a developed community outreach process. Cultural inclusiveness, seeking diverse viewpoints, and positive forward vision were all strong suits. Expertise in space planning and architecture a considerable asset. Spanish speaker on team.	Multi-disciplinary team of 3 (Principal, Community Development & Community Analysis) with experience across strategic planning, library systems, interior design and space planning, and community engagement. Extensive experience working with libraries. Team has experience with strategic plans and facility master plans. Number of in-person visits needs clarification.	Yes (all library-related)
Joseph R. Matthews	Not solely focused on strategic planning, but would come in with working knowledge of libraries of the 21st century. Good experience with facilitation.	\$16,800 (charges a day rate of \$700 rather than an hourly rate); works locally which keeps costs low	Organized, straightforward proposal. Very workmanlike and clearly well-grounded in libraries and their needs.	Good understanding of ALD's needs + obvious expertise in libraries. Thorough community outreach process which would meet requirements.	1 person (no team). Diversity of experience with libraries beyond development of strategic plans.	Yes
Rauch Communication Consultants, Inc.	Extensive experience with developing strategic plans; impressive depth of experience in assisting special districts throughout California.	\$41,8310 (included a reduced-cost option of \$39,820 that excluded all-staff meeting and included confidential meeting with up to 20 people). Detailed summary of cost breakdown. RFP recommended a further discussion about scope and process to investigate other options to reduce cost and seems sensitive to budgetary constraints.	Professional proposal. Extremely detailed scope of services and cost. Provided multiple options for various points of RFP scope that could add value. Very little evidence of library experience or understanding of library needs beyond basic governance.	Comprehensive plan but beyond our need and budget, and insufficiently grounded in libraries and library systems of the 21st century.	3 person team (consultant + 2 support staff); extensive experience working with CA special districts. Very limited experience with libraries.	Yes
Leading Change Consulting	Prior strategic planning experience, but would require follow-up to establish whether strategic planning related projects listed resulted in a developed plan adopted by the organization; unclear link between team's public health expertise and ALD.	\$20,850; detailed breakdown of costs with emphasis on community engagement work; works locally which benefits costs.	Organized proposal, with some unclear portions (e.g. duplication of references).	Scope of service and tasks are well considered. Good understanding of ALD and local community. Cultural inclusiveness and neutrality were strong suits. Spanish speaker on team.	3 person multi-disciplinary team with experience in community engagement, although limited experience with library systems more broadly. Would require additional follow-up to clarify whether team has worked together on prior projects, and whether team's individual insurance would meet ALD requirements.	Yes
Bridge Innovate- Jenny Whitener	One strategic plan for a library system, but otherwise experience seems to focus on larger cultural institutions, mostly in the southeastern US (Tennessee, Georgia).	\$38,500 + travel and materials expenses	Generic proposal, not particularly responsive to ALD's needs or particular situation. Proposal extensively developed additional services *not* included in proposed cost, most of which would not be hugely useful for ALD at this time. Very little evidence of understanding of library needs beyond surface level.	Conceptually covers all needs but not focused specifically on ALD. Overly corporate and generic, with insufficient evidence of expertise in, enthusiasm for, or attention to libraries or special districts. No regional or local expertise. Lack of specifics on execution, process, or methodology - would require extensive follow-up and is well beyond budget.	5 person team. Good corporate experience, but limited library experience. Very little information on roles and responsibilities of team members, or what particular experience, expertise, or skillsets they would bring to bear.	Yes

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<p>BHI Management Consulting</p>	<p>Extensive strategic planning experience, especially with special districts in California. Limited library experience - Placentia Library District? Would require follow-up to determine whether strategic planning process listed resulted in a developed plan adopted by the organization.</p>	<p>\$26,320 + estimated expenses of \$3,675 (total \$29,995)</p>	<p>Proposal did not illustrate any particular enthusiasm for or interest in project. Very broad (insufficient detail); typos and grammatical errors in proposal.</p>	<p>Broadly focused. Limited community process was outlined.</p>	<p>1 consultant, no team. No indication that consultant has worked with libraries or districts in a similar strategic planning process. Consultant is currently conducting multiple other strategic planning processes throughout California (possible impediment to ALD's timeline)</p>	<p>No</p>
<p>Wild Card Strategy</p>	<p>Extensive strategic planning experience but not with public sector agencies and no library experience. Commercial/private-sector primarily (although did include letter of reference from Orange County Cemetery District).</p>	<p>\$24,500</p>	<p>Very detailed ten-phase plan, but proposal not specific to ALD. Proposed cost only includes phases 1-7 (8-10 available at additional cost). Not particularly applicable to current needs.</p>	<p>Very broad focus. Added unnecessary additional scope, and framed positive outcomes in terms of financial success. Limited community engagement process outlined.</p>	<p>1 consultant, no team. No indication that consultant has worked with libraries or districts in a similar strategic planning process. Consultant does not appear to understand libraries or library districts, the Brown Act, or other public agency needs.</p>	<p>Yes</p>