



CITY COUNCIL AGENDA ITEM

April 24, 2012

TO: John Szerlag, City Manager

FROM: Mark F. Miller, Director of Economic & Community Development
Susan A. Leirstein, Purchasing Director
Cathleen A. Russ, Library Director

SUBJECT: Standard Purchasing Resolution 8 – Best Value Award: Strategic Planning Consultant for Troy Public Library

Background

On September 26, 2011, Troy City Council approved the 2011-2012 budget for the Troy Public Library, which included hiring a consultant to conduct strategic planning for the Troy Public Library, for an estimated total cost not to exceed \$20,000 (Res#2011-09-216). The purpose of the proposed library strategic plan is to provide all stakeholders – City Council, administration, employees, residents, business, educational and other interest groups – with an opportunity to chart the direction the Troy Public Library should take for the next three years, and to provide a framework to implement that direction. The scope of work includes: convening of focus groups from all stakeholder categories, including non-library users; data collection and analysis; creation of a Library Vision, Mission, and Goals; and devising an implementation schedule for the Vision, Mission and Goals. Increased collaboration and partnerships with community members and organizations, as well as improved library service, is the expected result of the strategic planning process.

A request for qualifications/proposal (RFQ/RFP) for a Library Strategic Planning Consultant was sent to one-hundred ninety-four (194) firms through the Michigan Intergovernmental Trade Network (MITN) e-procurement website at www.mitn.info.

RFQ/RFPs were received from four (4) firms. All four (4) firms met the pass/fail criteria established for the Library Strategic Planning Consultant.

The four (4) firms' proposals were evaluated independently by a review committee and each individual member calculated a weighted score based on their review. These individual scores were averaged into one score for each firm and represent forty (40) percent of the overall score. The price score represents forty (40) percent of the overall score.

The two (2) top-rated firms participated in an interview conducted by the Purchasing department with the Director of Economic & Community Development, Community Affairs Director, Library Director, and Assistant Library Director as the interview panel. The interviews were independently evaluated by each committee member and the weighted scores were averaged into one score for each firm. The interview comprises twenty (20) percent of the final score for each firm.

The tabulation was completed by the Purchasing department. Erin Gong received the highest score as a result of a best value process. The proposed contract with Erin Gong is for an amount not to exceed \$13,950.00. Ms. Gong is an independent planning consultant who works with libraries and museums in the areas of evaluation, project planning, and visitor studies. Ms. Gong has developed strategic plans for the Ann Arbor Hands-On Museum, the Chelsea District Library, and the American Museum of Magic.



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April 24, 2012

To: John Szerlag, City Manager
Re: Best Value Award – Library Strategic Planning Consultant

Legal Considerations

RFQ-RFP-COT 11-27, Library Strategic Planning was competitively bid as required by City Charter and Code. The award is contingent upon the firm's submission of properly executed proposal, contract documents, insurance certificates and all other specified requirements.

Recommendation

City management recommends awarding a contract to develop a library strategic plan to the highest rated firm as a result of a best value process, Erin Gong, 2808 S. Knightsbridge Circle, Ann Arbor, MI 48105, for an amount not-to-exceed \$13,950.00.

Fund Availability

Funds are available in the Troy Public Library's operating budget, 271.790.7816.010, Consultant Services.



EXECUTIVE SUMMARY

LIBRARY STRATEGIC PLANNING CONSULTANT

STATISTICS:

- ◆ **One-hundred ninety-four (194) firms were notified via the MITN e-procurement website**
- ◆ **Four (4) proposals were received**
- ◆ **All four (4) firms met the pass/fail criteria**
- ◆ **Top two (2) firms were interviewed**
- ◆ **Erin Gong received the highest score as a result of a best value process**

The following two (2) firms received the indicated final scores as a result of the RFP evaluation, interview, detailed proposal and pricing selection criteria.

Firm	SCORE
Erin Gong	81.75
W.J. Schroer Company	73.30

Attachments:

- ✓ Weighted Final Scoring includes Proposal, Price and Interview
- ✓ Evaluation Process
- ✓ Original Tabulation



WEIGHTED FINAL SCORING
Library Strategic Planning Consultant

Final Score Calculation:

$$\begin{array}{r}
 40\% \text{ Proposal Score (100 point base)} \\
 40\% \text{ Price Score (100 point base)} \\
 20\% \text{ Interview Score (100 point base)} \\
 \hline
 100\%
 \end{array}
 = \text{Final Weighted Score}$$

Weighted Average Score for Proposal: 40%

RATERS	1	2	3	4	5	Average	Final Weighted Score (x .40)
Vendors:							
Erin Gong	87	35	80	49	98	69.8	27.92
Jade Strategies Management Consulting Services	95	37	78	98	100	81.6	32.64
Growth Management Consulting, Inc.	72	100	69	69	87	79.4	31.76
W.J. Schroer Company	93	73	83	93	100	88.4	35.36

Weighted Average Score for Price: 40%

RATERS	Weighted Criteria - Difference in Costs (Lowest Proposal Price / Proposal Price) x Available Points	Final Weighted Score (x .40)
Vendors:		
Erin Gong	$(13,950 / 13,950) \times 40$	40.00
Jade Strategies Management Consulting Services	$(13,950 / 39,160) \times 40$	14.25
Growth Management Consulting, Inc.	$(13,950 / 30,480) \times 40$	18.31
W.J. Schroer Company	$(13,950 / 26,000) \times 40$	21.46

Summary: Proposal and Price Scores

	Proposal Score	Price Score	Score
Vendors:			
Erin Gong	27.92	40.00	67.92
Jade Strategies Management Consulting Services	32.64	14.25	46.89
Growth Management Consulting, Inc.	31.76	18.31	50.07
W.J. Schroer Company	35.36	21.46	56.82

Interviews were conducted for only the top two rated companies (Maximum # of points – 20)



Weighted Average Score for Interview: 20%

RATERS	1	2	3	4	Average	Final Weighted Score (x .20)
Vendors:						
Erin Gong	92	50	62	72.5	69.13	13.83
W.J. Schroer Company	78	100	86	65.5	82.38	16.48

FINAL SCORE:

VENDORS:	Erin Gong	W.J. Schroer Company	Growth Management	Jade Strategies Management
Proposal Score	27.92	35.36	31.76	32.64
Price Score	40.00	21.46	18.31	14.25
Interview Score	13.83	16.48	0	0
FINAL SCORE	81.75	73.30	50.07	46.89

**HIGHEST RATED VENDOR - RECOMMENDED AWARD



SELECTION PROCESS

SECTION 3: CRITERIA FOR SELECTION

The Evaluation Committee will review the proposals. The City of Troy reserves the right to award this proposal to the consultant considered the most qualified based upon a combination of factors including but not limited to the following:

- A. Compliance with qualifications criteria
- B. Completeness of the proposal
- C. Financial strength and capacity of the company
- D. Correlation of the proposals submitted to the needs of the City of Troy
- E. Any other factors which may be deemed to be in the City's best interest
- F. Evaluation Process

Phase 1: Minimum Qualifications Evaluation (Pass / Fail)

Consultant will be required to meet minimum established criteria in order to go to the second phase of the process.

Phase 2: Evaluation of Proposals (40%)

Each Committee member will independently use a weighted score sheet to evaluate the proposals; each Committee Member will calculate a weighted score. The scores of the Committee Members will be averaged into one score for each consultant for this phase of the process.

Phase 3: Interview Process (20%) – Optional

The City, at its option, will invite the top rated consultants to participate in an interview. Each Committee Member will independently use a weighted score sheet to evaluate the Interview; each Committee Member will calculate a weighted score. The scores of the Committee Members will be averaged into one score for each consultant for this phase of the process. Those being interviewed may be supplied with further instructions and requests prior to the interview. Persons representing the business at the interview must be the personnel who will be assigned to this project.

Phase 4: Price (40%)

Points for price will be calculated as follows:

$$\text{FORMULA: } \{1 - (\text{Proposal Price} - \text{Lowest Proposal Price}) / \text{lowest proposal price}\} \times \text{available points}$$

Phase 5: Final Scoring and Selection

The consultant with the highest final weighted score will be recommended to the Troy City Council for Award.

40% Proposal Score (100 point base)
20% Interview Score (100 point base) Optional
40% Price Score (100 point base)
100%

Note: The City of Troy reserves the right to change the order or eliminate an evaluation phase if deemed in the City's best interest to do so.

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COMPANY NAME:

Erin Gong	W.J. Schroer Company	Growth Management Consulting, Inc.

PROPOSAL: TROY PUBLIC LIBRARY STRATEGIC PLANNING SERVICES

SIX (6) COPIES	(Attached)	Y	Y	Y
VENDOR QUESTIONNAIRE:	(Attached)	Y	Y	Y
SAMPLE DOCUMENT:	(Attached)	Y	Y	Y
INSURANCE:	Can Meet	XX - see Exceptions	XX	XX
	Cannot Meet			
	Signed Y or N	Y	Y	Y

ESTIMATED # OF HOURS:	265	250-300	178
Estimated Total Consulting Costs:	\$ 8,450.00	\$ 10,000.00	\$ 30,480.00
Estimated Total Data Analysis Costs:	\$ 4,800.00	\$ 12,000.00	\$ -
GRAND TOTAL NOT-TO-EXCEED: (Including Reimbursables)	\$ 13,950.00	\$ 26,000.00	\$ 30,480.00

SCHEDULE OF VALUES: (Attached to bid)	Y	Y	Y
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PAYMENT TERMS:	Partial up front, rest upon completion	Net 30	Upon Invoice
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EXCEPTIONS:	Reduce by \$2,000 if insurance req lowered Need to discuss project timeline	Blank	Blank
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ACKNOWLEDGEMENT: Signed Y or N	Y	Y	Y
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THREE FORMS:	Attached:			
Legal Status	Y / N	Y	Y	Y
Non-Collusion	Y / N	Y	Y	Y
Indemnification Clause	Y / N	Y	Y	Y

ATTEST:
Carolyn Easter
Susan Riesterer
Julie Hamilton

Susan Leirstein CPPO CPPB
 Purchasing Director

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COMPANY NAME:

Jade Stategies Inc.

PROPOSAL: TROY PUBLIC LIBRARY STRATEGIC PLANNING SERVICES

SIX (6) COPIES (Attached)

Y

VENDOR QUESTIONNAIRE: (Attached)

Y

SAMPLE DOCUMENT: (Attached)

Y

INSURANCE: Can Meet
 Cannot Meet
 Signed Y or N

XX

Y

ESTIMATED # OF HOURS:

297

Estimated Total Consulting Costs:

\$ 15,000.00

Estimated Total Data Analysis Costs:

\$ 22,060.00

GRAND TOTAL NOT-TO-EXCEED:

\$ 39,160.00

(Including Reimbursables)

SCHEDULE OF VALUES: (Attached)

Y

PAYMENT TERMS:

Blank

EXCEPTIONS:

Blank

ACKNOWLEDGEMENT: Signed Y or N

Y

THREE FORMS:

Legal Status Y / N

Y

Non-Collusion Y / N

Y

Indemnification Clause Y / N

Y