

MEMORANDUM

To: All Interested Vendors

From: Procurement Department,
Columbus Metropolitan Library

Date: March 4, 2024

Subject: Addendum No. 2 – CML 25-009 Strategic Planning Consultant
Summary of Pre-Proposal Meeting
Questions and Answers

Part I. Summary of Pre-Proposal Meeting

On Monday, February 24, 2025, , the Columbus Metropolitan Library (“Library”) conducted a Pre-proposal meeting for the RFP 25-009 Strategic Planning Consultant. The meeting was held online via Microsoft Teams. The following library representatives attended:

Mona Mawalkar, Procurement Manager
Jamie Lang, Interim CFO
Wendy Tressler, Director of Capital Planning and Project Management
Lauren Hagan, CEO

The following companies attended:

Margaret Sullivan LLC
Gensler
Alford Group
Stackd Consulting
Pathenon
Illuminology

Part II. Questions and Answers

Q1. Do you have a budget range you are expecting? Or a not-to-exceed amount? Do you have a fee range in mind? Do you have any sort of guidelines or parameters or benchmarks around pricing for something like this or budget guidance?

A1. We don't have a set budget in mind. We are seeking options from consultants specifically around engagement. We would like to see options in your proposal for different levels of engagement and costs associated with those levels of engagement.

Q2. Do you expect the work to be in-person, or is remote work acceptable?

A2. We expect much of the work to be in person and supplemented with virtual meetings.

- Q3.** Could you provide any guidance around the timing for the project? When would you expect it to kick off? How long would you expect it to be? Do you have a specific timeline in mind? Could you provide any guidance around the timing for the project? When would you expect it to kick off? How long would you expect it to be?
- A3.** We are looking to start soon but can certainly entertain conversations with consultants about schedules. Ideally, we would view this as a one-year project but would expect the consultants to provide some recommendations.
- Q4.** What are the priority languages for engagement? Does CML prefer to handle translation, or should the consultant?
- A4.** We would work with the consultant to determine the best resources for translation.
- Q5.** Are there any scheduling dependencies?
- A5.** We are opening four buildings at the end of this year and early into next year. The CML team for this project is also on the teams for those projects. That's a constraint that will need to be managed.
- Q6.** We are curious to learn more about what information and client feedback are already part of your program. So, what is readily available through other means versus needs to be directly sought through the strategic planning process?
- A6.** We gather customer information through a product called Orange Boy and customer surveys. Some information is limited to engaged customers and those who have a Library card. We have some information for Staff. We will start some community engagement specific to the new Case Road branch so that information will be available.
- Q7.** Is there a level or an existing expectation around the community engagement piece? Do you have thoughts on the different groups or the time the engagement requirements?
- A7.** Regarding engagement, we would prioritize staff and stakeholders first, followed by the community. We want to be strategic and intentional about Community engagement but not excessive.
- Q8.** Compared to past experience, where do you see the biggest changes? In Columbus and in the communities that you're serving from, the time that strategy was created to present
- A8.** We are located in a growing city and with that comes opportunities and challenges. We have many challenges like access to housing and homelessness. We also want to be mindful of the demographics with a growing share of older adults than in the previous 5-10 years. We are a rapidly changing community, and we expect this work to guide us on how the library can best position itself as that sought-after Community asset amongst the other assets in our community while supporting the city, county and other non-profits with similar customer base. We also want to study how the demographic and population growth can be translated into the services the Library provides.
- Q9.** Regarding the previous 2020 vision plan, any suggestions regarding what went well or could be done better this time? Does the CML team have thoughts on what went well or what could have been done better in developing the current Strategic Plan or Master Facilities Plan?

- A9.** The past facilities plan was largely based on statistics like chairs per capita, which may not be relevant now. The plan didn't consider the aging population or changing demographics of the community. It also assumed that an increased population meant an increase in library usage. Since then, we have used data more robustly in our organization. We did not look at poverty levels then, but we look at them more closely now.
- Q10.** Are any planned staff retreats, board retreats, or other meetings that you have already planned this year that you anticipate may be part of your strategic planning process?
- A10.** We don't have any specific board retreats planned yet, but that's it something that will likely be planned. For staff, we will have some time in October
- Q11.** How do you find virtual engagement? Has that worked well for you?
- A11.** Some specific short online surveys have worked for customers, but for more in-depth information, they have not.
- Q12.** How many stakeholder groups does CML expect to engage?
- A12.** Please provide us with options based on your experience and best practices. We view this as negotiable based on each consultant's unique proposal.
- Q13.** Are there existing advisory groups, committees, or community partners identified for outreach?
- A13.** We will work with the selected consultant to determine which advisory groups and community partners to engage in this process based on the engagement model selected.
- Q14.** Will CML staff handle outreach logistics (e.g., scheduling interviews and focus groups), or will that be the consultant's responsibility?
- A14.** Please provide us with the option for both scenarios with pricing.
- Q15.** When is the expected project start date after contract negotiations?
- A15.** Please see Q3.
- Q16.** Is there an expectation for on-site versus virtual engagement activities?
- A16.** See Q14
- Q17.** Are there any page limits or formatting preferences (e.g., font size, spacing) for the proposal?
- A17.** We do not have a page limit or formatting preference other than those outlined in Proposal Submission Requirements as provided in the RFP document under the General Instructions section.
- Q18.** Can attachments, such as case studies or letters of recommendation, be included?
- A18.** Yes
- Q19.** While the cost proposal is required, does CML have an estimated budget range or ceiling for this project?
- A19.** Please see Q1.

Q20. Will the consultant's travel expenses need to follow a specific reimbursement policy?

A20. We prefer that your cost proposal include travel costs. If they are not included, out of town meal expenses maybe subject to the following limitations - Out-of-town meal expenses are reimbursable based on actual expense incurred up to a per diem allowance as determined by the U.S. General Services Administration CONUS (Continental United States) rate for the location and time the event occurred. If the per diem locality is not listed in the CONUS rate listing, the Standard CONUS rate should be used. A list of the CONUS rates can be obtained from <https://www.gsa.gov/travel/planbook/per-diem-rates>. Meal expense reimbursements do not include alcohol."

Q21. Will the CML conduct interviews or presentations for shortlisted applicants?

A21. There is a possibility, although the final decision has not been made yet.

Q22. Does CML have a preferred completion timeline for the strategic planning process? Should the final strategic plan be delivered by a specific date, or is the timeline flexible based on the consultant's proposed approach?

A22. See Q3

Q23. Does the CML have a preferred method of engagement: virtual, in person, a combination of both?

A23. Please see Q2.

Q24. We are a business in good standing in our home state, should we register to do business in Ohio and if so, can this be completed during contract negotiations?

A24. Your firm is not required to register with the State of Ohio to do business with the library.

Q25. Are there any restrictions or concerns regarding working with a Canadian entity?

A25. No.

Q26. How will Small and Emerging Business Status factor into evaluation?

A26. As a responsible public entity, the Library tracks its spending with Small and Emerging Businesses. The final decision will be based on the overall RFP response that is deemed most advantageous to the Library based on the information provided in the Selection Process section of the RFP.

Q27. What benchmarking and research information (if any) does CML directly subscribe or have access to?

A27. Orangeboy and several research tools are available on our [website](https://www.columbuslibrary.org/resources-by-subject/) at <https://www.columbuslibrary.org/resources-by-subject/>

Q28. In evaluating firm experience, how will the relative value of experience in strategic planning, local and regional experience and depth of experience working with libraries or other factors be weighted?

A28. Please refer to the Selection Process section of the RFP, which provides detailed information on the evaluation criteria. Please also review Appendix D - Evaluation Matrix provided with the RFP. CML anticipates hiring a firm with robust experience in strategic planning with large public libraries. When describing your team, please ensure that you

specifically identify their experience with strategic planning consulting and not just your firm's experience.

Q29. The RFP doesn't detail who the decision makers and/or committee will be that is driving the process. We are interested in whether there is an internal "point person" to coordinate the various decision making bodies that will be involved in this process. In other words, who has "voice" and who has "choice" during key decision points in the strategy process, and who is the internal sponsor for this work?

A29. Members of the evaluation committee will evaluate and score proposals as outlined in the Selection Process section of the RFP. Please also review Appendix D - Evaluation Matrix provided with the RFP.

Q30. We are curious about the stability of the leadership team at Columbus Metropolitan Library - we see that there is a new CEO as of October 1, 2024. What are the expectations for that new CEO and other leadership staff members for guiding this process alongside other stakeholders?

A30. The CML leadership team is very stable.

Q31. What can we expect in terms of documented overall strengths and challenges of the past few years to serve as background material for the strategic planning process? This could include previous strategic plans, board retreat notes, donor and/or patron engagement surveys, etc. In the spirit of not duplicating work, we always find it incredibly helpful when clients have these materials available! For our purposes in planning what may need to be updated, how much of the background material/content can be considered "current" (say, since the CEO transition)?

A31. We will discuss this with the selected consulting firm.

Q32. We know that CML has an extensive partner network in Columbus, and that this work will engage stakeholders deeply in the process. For our initial discovery work, we want to ensure that our proposal accounts for reality in both scope (e.g. how many interviews, focus groups, etc. with stakeholders) but also timeline. Planning meaningful stakeholder engagement just ahead of the busy summer season can sometimes be challenging due to availability of interviewees, and so we want to account for your ideal timeline for the process including optimal "delivery" date for all final materials. Did you have key milestone dates for this process? We can certainly recommend the sequence and duration of activities based on our experience, but if there are known delivery dates, please let us know!

A32. We will discuss this with the selected consulting firm.

Q33. Given that the selection criteria includes total project cost, we'd benefit from knowing the budget range if you are comfortable sharing it. It helps us appropriately scope the work to match your budget.

A33. Please see Q1.

Q34. Who is CML's ideal partner type for this work (e.g., independent contractor, management consulting firm, etc.)?

A34. CML works with all types of vendors, suppliers and consultants. We do not prefer a particular type of organization. We will complete a due diligence check before the contract negotiations step in the RFP process.

All Proposals must be received no later than 12:00 Noon on March 14, 2025, ET.

PROPOSERS ARE REQUIRED TO ACKNOWLEDGE THE RECEIPT OF THIS MEMORANDUM (ADDENDUM NO. 2) ON THE ACKNOWLEDGEMENT OF THE ADDENDA FORM IN THE RFP DOCUMENTS