



General Services Department

Request for Qualifications (RFQ)

for

**Facility and Strategic Planning Services
for
A Master Plan for the Houston Public Library**

Qualifications Submittal Date
January 28, 2013

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I. PURPOSE

The City of Houston, General Services Department (GSD), on behalf of the Houston Public Library (HPL), invites the submittal of Statements of Qualification (SOQs) from firms interested in providing facility and strategic planning services for a ten-year community assessment for the Houston Public Library system.

The planning team will provide all services necessary to provide the following:

- Five Year Service Plan
- Ten Year Facilities Plan
- Implementation Plan

II. PRE-SUBMITTAL MEETING

A pre-submittal meeting will be held at 10:30 a.m. on January 22, 2013, at City Hall Annex 900 Bagby, Second Floor Conference Room, to discuss this solicitation. Attendance at the meeting is not mandatory.

Before the pre-submittal meeting date, the City will welcome any written questions submitted, faxed or emailed to:

Humberto Bautista, P.E.
City Engineer
General Services Department
900 Bagby, Second Floor
Houston, Texas 77002
Fax: 832-395-9542
humberto.bautista@houstontx.gov

- The City will not be bound by any information conveyed verbally. The City will provide, in writing, any clarifications, changes and/or other information, deemed to be necessary, as addenda to this RFQ.
- Addenda will only be provided to pre-submittal meeting attendees and known RFQ holders registered with BSD.
- No Addendum will be issued later than noon on Tuesday before the Submittal Date, except Addenda with minor clarifications, withdrawing RFQ, or postponing the Submittal Date.

III. OBJECTIVE

GSD proposes to retain a highly qualified planning firm or joint venture to provide the services described herein. The planning team needs to include library facilities expertise, library service/operations expertise; a team member who is familiar with Community Connect, a library planning and market segmentation product used by HPL provided by Civic Technologies, a team member who can facilitate group meetings of internal and external stakeholders; and a team member who can help HPL develop alternative future scenarios. Firms and team members with significant experience in planning with similar characteristics will be given prime consideration for this project. Those firms or joint ventures that participate in this RFQ process will be referred to as “Respondents”. “Respondent” and its subconsultants shall be referred to collectively as the “Team”. The successful firm or joint venture will be referred to, in the RFQ, as the “Planner”.

IV SCOPE OF WORK

The master plan report will address the following strategies:

A. Service Plan

1. Analysis of Five and Ten Year Trends and Forecasts, and Service Needs.
Identify:
 - Demographic Trends and Forecasts for Houston area
 - Economic Trends and Forecasts for Houston area
 - Library Industry/Service Trends and Forecasts
2. Creation of futures scenarios for 10-year period
 - Scenarios that project HPL’s future with growing budgets
 - Scenarios that project HPL’s future with stagnant budgets
 - Scenarios that project HPL’s future with reduced budgets
3. Recommended Strategic Directions/Service Priorities based on analysis of trends and forecasts and of library and market segmentation data from Community Connect
 - For 5-year and 10-year projections
 - Identify impacts on:
 - Staffing
 - Technology and its sustainability
 - Facilities

B. Ten-Year Facility Plan FY 2014-23

Analysis of existing locations and entire HPL Service Area (existing and 10-year

projection) and determine if libraries match Goals and Objectives. Identify:

1. Locations that should be renovated enlarged or replaced
2. Extent of the work
3. Ideal sites, sizes and models of service for new and replacement libraries, taking into account available funding stream for construction and operation
4. Locations to be closed, consolidated, or relocated
5. For under-served areas, proposed site, size and model of service
6. For over-served areas, locations to be closed, consolidated, or relocated

C. Implementation Plan

1. Objectives and Broad Tasks for Service Priorities
2. Three year plan for service implementation, with opportunity for review and adjustment for final two years
3. Prioritized facility project list (with rank order)

V. SELECTION PROCESS

The Teams will be selected in a two-step process.

- **Step 1 (Statement of Qualifications)** – A selection committee consisting of five members will rank Respondent's SOQs based on the selection criteria and relative weights set out in Section V-A of this RFQ. The high and low score for each SOQ will not be considered. Respondents can receive up to 100 points for the SOQs. A maximum of five firms will be short-listed to participate in step 2.
- **Step 2 (Interviews/Presentations)** – Short-listed Respondents will be required to participate in an interview/presentation. The interview/presentation will be ranked as set out in Section V-B of this RFQ. The high and low score for the interview/presentation will not be considered. The Respondent can receive up to 100 points for the interview/presentation.

The apparent successful Respondent will be the Respondent that offers the best value to the City based on the combined SOQ and interview/presentation scores.

VI. SELECTION CRITERIA

The City is seeking a highly qualified planning team, experienced in providing services outlined in Objectives and Deliverables. The required qualifications may be demonstrated in the experience of Respondent's team members. A Selection Committee composed of representatives from GSD and HPL will review the SOQs. The criteria used to evaluate SOQs will include the following:

A. Statement of Qualifications

1. Knowledge of local conditions as shown in VII.C.1 (Local Conditions).
Maximum 20 points
2. Suitably sized staff to meet the peak phases of work, as shown in VII.C.1 (Local Conditions)
Maximum 5 points
3. Experience by Lead Firm in library master planning and library strategic planning for large municipalities as shown in VII.C.2 (Lead Firm Experience)
Maximum 20 points
3. Experience by Team members (Collaborating Firms) on library master planning and library strategic planning for large municipalities, as shown in VII.C.3 (Team Members (Collaborating Firms) Experience).
Maximum 20 points
5. Experience in similar or relevant projects by individuals who would be assigned to this project, as shown in VII.C.5 (Resumes).
Maximum 10 points
6. Strong, established, and proven working relationships among team members, as indicated in VII.C.6 (Relationship Matrix), and VII.D.1 (Narrative).
Maximum 5 points
7. Understanding of City's needs and appropriateness of team's approach to this project, as described in VII.D.1 (Narrative)
Maximum 15 points
8. Applicability and quality of references, as provided in VII.E.1 (Testimonials).
Maximum 5 points

Maximum total Point Value for the criteria noted above in paragraphs VI.A.1 thru VI.A.8 equals **100 points**.

B. Presentation/Interview 100 points

The short-listed Respondents will make a presentation and answer questions from the selection committee. The key personnel will be required to participate in the presentation / interview. The presentation/interviews will be ranked based on the selection criteria and relative weights set out below.

- Demonstrate team's competence, qualifications and ability.
Maximum 40 points
- Demonstrate knowledge of library industry trends and public facility trends in reference to community needs for library services. Demonstration can be in form of a PowerPoint™ presentation, graphs, photographs or graphics on foam-core boards.
Maximum 30 points
- Demonstrate feasibility to implement the project as proposed.
Maximum 10 points
- Quality of presentation/interview.
Maximum 20 points

VII. SUBMITTALS

Six copies of sealed submittals are required. Submittals shall be delivered to City Secretary of the City of Houston, in the Margaret Westerman Building (a.k.a. City Hall Annex), Public Level, 900 Bagby Street, Houston, TX 77002, at or before **12:00 p.m., local time, January 28, 2013**. Late submittals will not be accepted for any reason. All submittals must be provided in a sealed box clearly labeled on the outside with the Respondent's name, name of the Project, and General Services Department.

To enable the City to efficiently evaluate the SOQs, Respondents are urged to strictly follow the required format in preparing their SOQ.

Each copy of the SOQ shall be bound using GBC or other semi-permanent binding method, to ensure that pages are not lost. Each copy shall be no more than one-half inch thick. Pages shall be no larger than letter-size 8 ½" x 11" or, if folded to that dimension, twice letter size 11" x 17". Each section (defined below) shall be separated by a tabbed divider. Elaborate covers, binding, dividers, and the like are not required.

Each SOQ shall be organized in the following order:

- A. **Outside Cover and/or first page:** Shall contain the name of the SOQ (Houston Public Library Master Plan 2014-2023), the name of the Respondent, and the submittal date.
- B. **Table of Contents:** The next page shall be a table of contents.

C. Tabbed Section 1 (Team Experience & Organization)

1. *Local Conditions:* Please indicate the Lead Firm and size of the firm. It is a requirement of the City that all SOQs will indicate the lead firm proposed for the project and that firm must agree to maintain a Houston office during the term of the Contract.

The Lead Firm (Team Leader) will demonstrate knowledge of local conditions.

2. *Lead Firm Experience:* List all master plan projects completed in last ten years as a prime consultant. Provide brief description of services provided, owner's name and address.

The Respondent shall select three projects to highlight, as best representing the Team's project experience, and provide a briefing sheet for each. Each of the three briefing sheets shall be one-page, one-sided, and should contain information, which shows the capability of the proposed Team to provide the range of services that are required by this project. The work described must have been performed within the past ten years.

- a. Project Name
 - b. Year Project Completed
 - c. Short Description of Services Provided
 - d. Name of Client/Owner and current email address
3. *Team Members (Collaborating Firms) Experience:* Preference will be given to firms with master plan experience. On one page, list the Team members along with the primary responsibilities they will have on the Team.
 4. *Organization Chart:* The next page shall be a simple organization chart of individuals and representing firms, showing the reporting structure of the people proposed to do the work.
 5. *Resumes:* Attach resumes of all individuals named in organization chart. The resume will include but not limited to experience in similar projects, level of participation in each project, education, professional affiliations, and two references with contact information (email address and telephone number).

6. *Relationship Matrix*: Indicate working relationship between Team members on past projects.

D. Tabbed Section 3 (Narrative)

1. *Narrative*: The Respondent shall provide no more than three pages of narrative that describes:
 - Team's understanding of the City's needs and Team's approach to this project;
 - Proposed Team's working relationship.

E. Tabbed Section 4 (Quality of Service)

1. *Testimonials*: Respondents may include no more than three one-page letters from clients/Owners that they have worked with on previous projects. Letters should comment on planning experiences and qualitative matters related to services received from the Respondent or Team members.

VIII. ADDITIONAL INSTRUCTIONS, NOTIFICATIONS AND INFORMATION

- A. Respondents shall not offer any gratuities, favors, or anything of monetary value to any official or employee of the City for the purposes of influencing this selection. Any attempt by the Respondent to influence the selection process by any means, other than disclosure of qualifications and credentials through the proper channels, shall be grounds for exclusion from the selection process.
- B. Respondents who provide false or misleading information, whether intentional or not, in any documents presented to the City for consideration in the selection process shall be excluded. Any false or misleading information in these documents would, in effect, render the entire document suspect and therefore useless.
- C. **INTERVIEWS** – After the screening of SOQs, Respondents will be notified, in writing, of their status in the selection process. If interviews are needed, short-listed Respondents may be given additional information for interviews. These interviews will relate less to the past experience and qualifications already detailed in the submittal than to identification of the Respondent's program approach and to an appraisal of the people who would be directly involved in the project.
- D. **INQUIRIES** – Please do not contact the City during the selection process to make inquiries about the progress of this selection process. Respondents will be contacted when it is appropriate to do so.

- E. COST OF SOQS – The City will not be responsible for costs incurred by anyone in the submittal of qualifications or for any costs incurred prior to the execution of a formal contract.
- F. CONTRACT NEGOTIATIONS – This RFQ is not to be construed as a contract or as a commitment of any kind. If this RFQ results in a contract offer by the City; a specific scope of work, fees, insurance coverages, and other contractual matters will be determined during contract negotiations. To ensure that the appropriate staff is assigned to the project the City may make the inclusion of a “key persons clause” a part of the contract negotiations.
- G. CONFIDENTIAL INFORMATION – All responses shall be held confidential from other parties by the City to the extent allowable by law until after the selection process is completed. Respondents should be aware that at the completion of the selection process the contents of their SOQs are subject to the provisions of the Texas Public Information Act and may be made public. CONFIDENTIAL or SENSITIVE information should not be included in the SOQ.
- H. CITY POLICIES & ORDINANCES – Respondents should be aware of and therefore, familiar with all pertinent City of Houston Ordinances and policies which will relate to contracting with the City. The following is a partial list of relevant subjects:
1. Equal Employment Opportunity
 2. MWBE Goal of 24% participation
 3. City of Houston Fair Campaign Ordinance
 4. Mayor’s Drug Detection and Deterrence Policy and Procedures
 5. City Contracts and Indebtedness to Taxing Authorities
 6. Insurance requirements
 7. Conflict of Interest Questionnaire
 8. Pay or Play (POP) Program

- I. The City of Houston reserves the right to (1) evaluate the qualifications submitted; (2) waive any irregularities therein; (3) select Respondents for the submittal of more detailed information; (4) accept any submittal or portion of a submittal; and/or (5) reject any or all Respondents submitting qualifications, should it be deemed in the City's best interest.

(RAV) (CRC)

Humberto Bautista, P.E.
City Engineer
General Services Department