

RFP 2025-P-03

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



**BALTIMORE COUNTY  
PUBLIC LIBRARY**

REQUEST FOR PROPOSAL  
STRATEGIC PLAN CONSULTANT

RFP 2025-P-03

Issue Date: **April 03, 2025**  
Due Date: **May 08, 2025, 3:00 PM (EDT)**

Dave Otto, Purchasing Agent  
Phone: 410.887.6155  
Email: [tdotto@bcpl.net](mailto:tdotto@bcpl.net)

**BIDDER CHECK LIST**

- Have you signed your bid?
- Have you signed the Procurement Affidavit?
- Have you filled out all applicable forms?
- Have you provided the required original and duplicate copies?
- Have you signed the Acknowledgement of Sample Contract and Addendum(s) page 18?

Table of Contents

General Instructions for Proposals	Pages i to iii
1. Instructions, Forms, And Specifications	i
2. Award Of Solicitations	i
3. Reservations	i
4. Delivery	ii
5. Competition	ii
6. Terminations	ii
7. Hold Harmless – Indemnification	ii
8. Minority Business Enterprise (MBE) And Small Business Notice	ii
9. Authority	ii
10. HIPAA	ii
11. Terms Of Contract	iii
12. Severability	iii
13. Counterparts	iii
14. Survival:	iii
15. No Waiver, Etc.:	iii
16. Requests For Proposals:	iii
Summary Bid Information	Pages 1 to 5
1. Background Information & Objective	1
2. Contact Information	1
3. Schedule	1
4. Submission Of Bid	2
5. Terms Of Contract	2
6. Award	3
7. Pricing	4
8. Invoicing And Terms Of Payment	4
9. Insurance And Bonding	4
10. References	4
11. Termination	5
Scope Of Work	Page 6 to 8
1. General Scope of Work	6
2. Capabilities and Specifications	7
3. Once An Award Is Made	8
Bid Reply Label	Pages 9 to 10
Technical Proposal	Pages 11 to 18
1. Cover Sheet	11
2. Form of Proposal	12
3. Procurement Affidavit	13
4. Acknowledgement of Addenda and Sample Contract	18
Financial Proposal	Page 19
1. Bid	19

## General Instructions for Proposals

### 1. Instructions, Forms and Specifications

1.1 All bids/proposals are to be submitted on and in accordance with the forms provided by the Library. All bids must be submitted in a sealed envelope or carton as appropriate. All bids must be clearly identified on the front of the envelope or top of the carton with the PROPOSAL NAME AND NUMBER and the DUE DATE and TIME. Bid times are either Eastern Standard Time or Eastern Daylight Time, whichever prevails. Late bids will not be considered.

1.2 Responses to Invitations to Bid and Requests for Proposals shall be accompanied by an executed Procurement Affidavit, as provided by the Purchasing Department.

1.3 Additional information or clarification of any of the instructions or information contained herein may be obtained from the Purchasing Department. The Library assumes no responsibility for oral instructions or suggestions. All official correspondence in regard to this proposal must be directed to, and will be issued by, the Purchasing Department.

1.4 Bidders finding any discrepancy in or omission from the specifications, in doubt as to meaning, or asserting that the specifications are discriminatory, shall notify the Purchasing Department in writing at once, but in no case later than five (5) business days prior to the scheduled closing of bids. Exceptions stated do not obligate the Library to change the specifications. The Purchasing Department will notify all with changes on the website, of any substantive revisions to the specifications or instructions.

1.5 Unless a written exception detailing nonconformance to specifications is noted on the bid, any part number, product number, catalog number, etc. noted on the bid will be considered in full compliance with the specifications.

1.6 Submission of a bid in response to this solicitation evidences the bidder's acceptance of these General Instructions and the terms and conditions of the solicitation. Submission of a bid evidences bidder's representation and warranty that the person submitting the bid response is authorized to act for and bind the Vendor.

1.7 All original and duplicate bids/proposals and other attachments, related documents and correspondence, including the follow-up documents and correspondence, shall be typed or written in English. All prices/percentages and/or other monetary figures shall be in United States dollars.

1.8 Issuing Officer: The sole point of contact for the Library for purposes of this proposal is the Purchasing Department, listed in the General Conditions of the Proposal; questions regarding any aspect of the competitive process must be directed to the Purchasing Department, in writing.

### 2. Award of Solicitations

2.1 It is the intent of the Library to make an award to the lowest responsive and responsible bidder whose proposal best meets the needs of the Library provided the bid has been submitted in accordance with requirements of the Proposal, and is judged to be reasonable.

2.2 Awards on Requests for Proposals and Invitations to Bid will be made within one hundred and eighty (180) days after bid closing unless otherwise indicated in the solicitation. No bidder will be allowed to withdraw a bid during that period.

2.3 The successful bidder may be required to give security or bond, as stated in the bid document, for performance of the contract.

2.4 Where there is a conflict between the unit price or percentage and the extension, the unit price or percentage will prevail as the amount of the bid.

2.5 Cash discounts will be considered in determining awards. However, cash discount offers must allow not less than 30 days to be

considered in bid evaluation. A bid offering a cash discount in a period of less than 30 days will be evaluated without a discount offer. However, should that bidder obtain award by consideration of the gross price, the Library shall make every effort to obtain the discount. The Library will not accept any payment terms with a period of less than 30 days.

2.6 Invoices against resulting order(s) must be submitted to the Purchasing Agent; Baltimore County Public Library; 320 York Rd; Towson MD 21204-5179. Unless specified otherwise invoices must show vendor's Federal Tax Identification Number or Social Security Number, as appropriate.

2.7 The Library will not pay interest charges or other penalties for invoice payments.

2.8 Prices quoted shall be exclusive of all non- applicable Federal and Maryland State taxes. Tax exemption certificate will be furnished if required.

2.9 The Library reserves the right to consider making payments via electronic funds transfers (EFT) on contracts for which this payment vehicle may be appropriate.

### 3. Reservations

3.1 The Library reserves the right to reject, in whole or in part, any and all bids received, and to make a whole award, multiple awards, a partial award, or no award, to best serve the interest of the Library.

3.2 The Library may waive formalities in bids as the interests of the Library may require.

3.3 The Library reserves the right to increase or decrease quantities by approximately twenty (20) percent to be purchased at the prices bid.

3.4 The Library reserves the right to award solicitations or place orders on a lump sum or individual item basis, or in such combination as to best serve the interest of the Library.

3.5 The Library may waive minor differences, irregularities, and technicalities in the specifications, provided they neither violate the specification's intent, materially affect the operation for which the items or services being purchased, nor increase estimated maintenance and repair costs to the Library.

3.6 At any time during normal business hours and as often as the Library may deem necessary, the Vendor shall make available all records, information and documentation related to the subject matter of this contract for inspection and/or photocopy. This includes but is not limited to, all contracts, invoices, payroll, and financial audits by the Library, its employees or agents,

3.7 Notwithstanding any other terms or provisions of the contract, in the event the Library is temporarily or permanently prevented, restricted or delayed in the performance of any or all of the duties and obligations imposed upon or assumed by it thereunder, by act of the General Assembly of Maryland or the Baltimore County Council, by a court of competent jurisdiction or by administrative delay not due to the fault of the Library (and its members and agents), the Library shall not be liable directly or indirectly for any claims caused to or suffered by the Vendor or any person in connection with or as a result of such prevention, restriction or delay.

3.8 The Library further reserves the right to make such investigation as it deems necessary to determine the ability of bidders to furnish the required services. Bidders shall furnish all such information for this purpose as the Library may request. The Library also reserves the right to reject the proposal of any bidder who is not currently in a position to perform the contract, or who has previously failed to perform similar contracts properly or in a manner acceptable to the Library, all of which shall be the Library's sole discretion.

## General Instructions for Proposals

### 4. Delivery

4.1 Bidders shall guarantee delivery of materials in accordance with the delivery schedule stated in the specifications. All items shall be delivered F.O.B. Destination/Inside Delivery, unless otherwise indicated, with delivery costs and charges included in the bid price.

### 5. Competition

5.1 The name of any manufacturer, trade name, or vendor catalog number mentioned in the specifications is for the purpose of designating a standard of quality and type, and for no other purpose, unless otherwise indicated in the specifications.

5.2 A bidder may offer a price on only one unit per line item. Even though two or more units may meet the specification, bidders must determine for themselves which price to offer. Submission by a bidder of prices for more than one unit per line item shall be sufficient cause for rejection of the bid for that specific item.

5.3 Bids which show omission, irregularity, alteration of forms or additions not called for, as well as conditional or unconditional unresponsive bids, or bids obviously unbalanced, may be rejected.

5.4 All bids must be accompanied by such descriptive literature or samples as may be called for by the specifications or proposal.

5.5 If products to be provided to the Library contain any substances that could be hazardous or injurious to a person's health, a materials safety data sheet (MSDS) must be provided to the Purchasing Department. This applies also to any product used by a Vendor when providing a service to the Library.

5.6 Specifications are based on Library needs and uses, estimated costs of operations and maintenance, and other significant and/or limiting factors to meet Library requirements, and to ensure consistency with Library policies. Minimum specifications, and maximum specifications where included, are not established arbitrarily to limit competition or exclude otherwise competitive bidders.

5.7 Unless multiple or alternate bids are requested in the proposal, these bids may not be accepted. However, if a bidder clearly indicates a base bid, it shall be considered for award as though it were the only bid submitted by the bidder.

### 6. Terminations

6.1 Termination for Convenience: The Library may terminate a contract, in whole or in part without cause, by providing written notice thereof to the Vendor. In the event of termination, without cause, the Library shall advise the Vendor in writing of the termination date and of work to be performed during the final days prior to contract termination. The Vendor shall be paid for all reasonable costs incurred by the Vendor up to the date of termination set forth in the written notice of termination. The Vendor will not be reimbursed for any anticipatory profits, which have not been earned up to the date of termination. Payments are to be provided on a lump sum basis shall be prorated by the Library based on the services rendered or goods delivered up to the date of termination set forth in the written notice.

#### 6.2 Termination for Default

6.2.1 In addition to other available rights and remedies, the Library shall have the right upon the happening of any default, without providing notice to the Vendor: 1) to terminate a contract immediately, in whole or in part; 2) to suspend the Vendor's authority to receive any undisbursed funds; and/or 3) to proceed at any time or from time to time to protect and enforce all rights and remedies available to the Library, by suit or any other appropriate proceedings, whether for specific performance or any covenant, term or condition set forth in the contract, or for damages or other relief. The Library may also proceed to take any action authorized or permitted under applicable laws or regulations.

6.2.2 Upon termination of this contract for default, the Library may elect to pay the Vendor for services provided or goods delivered up to the date of termination, less the amount of damages caused by the default,

all as determined by the Library and at its sole discretion. If the damages exceed the undisbursed sums available for compensation, the Library shall not be obligated to make any further disbursements hereunder.

6.3 Funding Out: If funds are not appropriated or otherwise made available to support contract continuation in any fiscal year, the Library shall have the right to terminate the contract without prior notice and without any obligation or penalty.

### 7. Hold Harmless - Indemnification

7.1 The Vendor shall defend, indemnify and hold harmless the Library, its employees, agents and officials from any and all liabilities, claims, suits, or demands including attorney's fees and court costs which may be incurred or made against the Library, its employees, agents or officials resulting from any act or omission committed in the performance of duties imposed by and performed under the terms of the contract. The Vendor shall not be responsible for acts of gross negligence or willful misconduct committed by the Library.

7.2 The Vendor shall also defend, indemnify and hold harmless the Library, its employees, agents and officials from any and all liabilities, claims, suits, or demands including attorney's fees and court costs which may be made against the Library, its employees, agents or officials by any third party arising from the alleged violation of any third party's trade secrets, propriety information, trademark, copyright, patent rights, or intellectual property rights in connection with the contract.

7.3 Unless notified in writing by the Library to the contrary, the Vendor shall provide defense for the Library, its employees, agents and officials in accordance with this Article and in doing so the Vendor shall allow the Library to participate in said defense of the Library, its employees, agents and officials, to the extent and as may be required by the Library. The Vendor shall cooperate with the Library in all aspects in connection therewith. All filings, actions, settlements, and pleadings shall be provided to the Library for comment and review prior to filing or entering thereof. No filing, action, settlement or pleading shall be filed or entered without the prior consent and approval of the Library.

### 8. Minority Business Enterprise (MBE) and Small Business Notice:

Although there is no requirement that the Vendor be an MBE, a Woman-Owned Enterprise (WBE), or a Small Business, M/WBE's and small businesses are encouraged to respond to this solicitation. Further specifications can be found at [http://www.baltimorecountymd.gov/Agencies/budfin/purchasing/minortybusiness/#Compliance\\_and\\_Monitoring](http://www.baltimorecountymd.gov/Agencies/budfin/purchasing/minortybusiness/#Compliance_and_Monitoring).

### 9. Authority

9.1 In case of disputes as to whether an item or service quoted or delivered meets specifications, the decision of the Purchasing Agent or authorized representative shall be final and binding on both parties. The Purchasing Agent may request the recommendation in writing of the head of the using agency/department or other objective sources.

9.2 Bidders desiring to appeal a decision of the Library must deliver written protests to the Purchasing Agent within 10 days of notification of award. The Purchasing Agent or designee will review the protested decision; examine any additional information provided by the bidder and respond in writing within 10 working days of receipt of written protests.

10. **HIPAA:** The Vendor shall comply with the Health Insurance Portability and Accountability Act (HIPAA) and shall execute a Business Associate Agreement as may be required by the Library.

## General Instructions for Proposals

### 11. Terms of Contract

11.1 Any contract awarded pursuant to this solicitation shall be by and between the successful offeror and the Library, and shall contain and incorporate, but may not be limited to, all terms and conditions of the solicitation, any amendments or changes thereto. Submission of a bid in response to this proposal evidences the Vendor's acceptance of the terms and conditions herein.

11.2 The provisions of the contract awarded pursuant to this solicitation shall be governed by the laws of Maryland and Baltimore County.

**12. Severability:** If any provisions in the contract are declared by a court or other lawful authority to be unenforceable or invalid for any reason the remaining provisions hereof shall not be affected thereby and shall remain enforceable to the full extent permitted by law.

**13. Counterparts:** The contract may be executed in any number of counterparts and by different parties hereto in separate counterparts, each of which when so executed and delivered shall be deemed to be an original and all of which taken together shall constitute but one and the same instrument.

**14. Survival:** The provisions of paragraphs 1.7 (Representations and Warranties), 4.2 (Damages), 7 (Indemnification), and 10 (HIPAA) shall survive delivery of commodities and/or performance of services.

**15. No Waiver, Etc.:** No failure or delay by the Library to insist upon the strict performance of any term, condition or covenant of the contract, or to exercise any right, power, or remedy consequent upon a breach thereof, shall constitute a waiver of any such term, condition, or covenant or of any such breach, or preclude the Library from exercising any such right, power, or remedy at any later time or times.

**16. Requests for Proposals:** In addition to aforementioned instructions, the following apply to Requests for Proposals.

16.1 All RFP proposals submitted shall be valid for 180 days following the closing date noted, unless otherwise specified in the bid documents. This period may be extended by mutual written agreement between offerors and the Library. Proposals may not be withdrawn during this period.

16.2 Modifications: The Library may, at any time by written order, make changes within the general scope of a contract including, but not limited to, changes (1) in any designs or specifications; (2) in the method, quantity, or manner of performance of the work; (3) in any Library-furnished facilities, equipment, materials, services, or property; or (4) directing acceleration in the performance of the work. No change, modification or revision shall be binding upon the Library, unless made in writing by its representative.

16.3 Subcontracting and Assignment: All subcontracting arrangements require prior approval of the Library. The Vendor shall not assign, transfer, convey, delegate, subcontract, or otherwise dispose of any award or any of its rights, title, or interest therein, without the prior written consent of the Library, which shall not be unreasonably withheld.

### 16.4 Additional Reservations for RFPs and Bids

16.4.1 This RFP/Bid creates no obligation on the part of the Library to compensate offerors for proposal preparation expenses. The Library reserves the right to award a contract based upon proposals received without further negotiation and may do so; offerors should not rely upon the opportunity to alter their proposals during discussions.

16.4.2 The Library reserves the right to waive minor irregularities, to negotiate in a manner necessary to best serve the interest of the Library, and to make a whole award, multiple awards, a partial award, or no award. The Library reserves the right to cancel this bid, in whole or in part at any time.

16.4.3 Confidentiality: Offerors must specifically identify any portions of their proposals deemed to contain confidential or proprietary information or trade secrets. Those portions must be readily separable from the balance of the proposal. Such designations will not necessarily be conclusive, and offerors may be required to justify why such material should not, upon request, be disclosed by the Library under the Public Information Act, State Government Article, Title 10, Sub-Title 6, of the Annotated Code of Maryland, as amended. The Library may disclose such information if required by law, court order or subpoena.

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Summary Bid Information

**1. OBJECTIVE AND BACKGROUND INFORMATION**

- 1.1. It is the intent of Baltimore County Public Library (BCPL) to enter into an Agreement with one (1) qualified Strategic Plan Consultant, as detailed in the section titled *General Scope of Work*.
- 1.2. The Strategic Plan project requires sets of deliverables due according to a schedule of phases of development as detailed in the General Scope of Work.
- 1.3. Baltimore County Public Library consists of 19 branches and one Administrative Office. The Board of Library Trustees is comprised of seven members appointed by the County Executive.
- 1.4. The Administrative Offices are located at 320 York Road, Towson, MD 21204. BCPL is a quasi-independent agency of Baltimore County Government.
- 1.5. Baltimore County Public Library employs approximately 550 employees, 300 full time, and 250 part time, in approximately 75 positions.
- 1.6. Baltimore County Public Library serves a population of approximately 845,000 county residents, providing equal access to library services for the entire community through 19 physical locations as well as outreach services, mobile library services, and online resources. Baltimore County Public Library Fiscal Year 2024 approved budget was for approximately \$49,000,000. The fiscal year begins on July 1st and ends on June 30th.
- 1.7. The specifications, terms, and exhibits of this RFP will become Exhibit A of the contract to be awarded as a result of this bid. Terms and Conditions as described in the BCPL Contract will apply. A Sample of the Standard BCPL Contract can be found on our website at <http://www.bcpl.info/about-us/bid-opportunities> and acknowledgement of this contract is a requirement for complete bid submission (See Page 18.)

**2. CONTACT INFORMATION**

- 2.1. Proposals, questions, and inquiries should be directed in writing to:  
Dave Otto  
Purchasing Agent  
Baltimore County Public Library  
320 York Rd.  
Towson, MD 21204  
[tdotto@bcpl.net](mailto:tdotto@bcpl.net)

**3. SCHEDULE**

- |                                  |                               |
|----------------------------------|-------------------------------|
| 3.1. RFP Issued                  | April 03, 2025                |
| Deadline to Submit Questions     | April 17, 2025, 3:00 PM (EDT) |
| Addendums Posted (if necessary)  | April 24, 2025                |
| Deadline for Proposal Submission | May 08, 2025, 3:00 PM (EDT)   |
| Estimated Date of Contract Award | June 19, 2025                 |

### Summary Bid Information

- 3.2. No pre-bid conference will be held in regard of this RFP.
- 3.3. The deadline to submit any questions regarding this RFP or the work to be performed must be submitted in email to the Purchasing Agent indicated in Section 3.1 by April 17, 2025, 3:00 PM (EDT). Any questions received after this time will be deleted. The Purchasing Agent will acknowledge that emails concerning questions have been received. Answers to any questions will be made as an Addendum and posted on the BCPL Bid Opportunities website <http://www.bcpl.info/about-us/bid-opportunities> by the end of day April 24, 2025.
- 3.4. Should an Addendum be created, it will become a portion of this RFP and the bidder will be required to acknowledge that it has been read.
- 3.5. All proposals are to be received by the Purchasing Agent or member of the Fiscal Services Department of Baltimore County Public Library, Towson location by May 08, 2025, 3:00 PM (EDT). All proposals will be marked by the time and date received. Proposals that arrive after the 3:00 PM deadline will not be accepted.

#### **4. SUBMISSION OF BID**

- 4.1. In order to be considered one (1) signed original and four (4) photocopies must be submitted to the Purchasing Agent. Bidders should allow sufficient time for their proposal to be received. The proposals will be date stamped by the BCPL Purchasing Agent or member of the Fiscal Services Department as they are delivered. Any bid received after the date and time indicated in Section 3.5 will be disqualified. There will be no formal proposal opening.
- 4.2. A complete bid is considered a submission in which all information as requested by Baltimore County Public Library has been supplied and all areas requiring a signature have been acknowledged. The cost of preparing proposals is the responsibility of the bidder. BCPL will not photocopy your proposal documents for the purpose of complying with this provision requiring a pre-determined number of duplicate copies. Failure to provide all requirements will result in the disqualification of the proposal.
- 4.3. Oral bids, either phone or in person, faxed bids, or email submissions are invalid and will not be considered.
- 4.4. Proposals should be prepared simply and economically, providing a straightforward, concise description of the offer, and all required information. They should be printed on recycled paper if possible; staples, clips or rubber bands are preferred to ring binders and unnecessarily elaborate brochures, or other expensive visual presentations are neither necessary nor desired. Each page of the proposal should be consecutively numbered.
- 4.5. Proposals must be submitted using the label provided in this bid package. Copies of the label must be used for multiple packages.

#### **5. TERMS OF CONTRACT**

- 5.1. The Purchasing Agent will submit the contract to the chosen firm within 15 days of them

Summary Bid Information

having won the award.

**6. AWARD**

6.1. Award will be made using a weighted scoring system based on the following criteria for a Strategic Plan Consultant.

6.2. The *Information Gathering and Framework Development Phase* and the *Complete Plan Development Phase* listed in the Scope of Work will be scored separately as shown below. BCPL will award one vendor for the Information Gathering and Framework Development Phase. If the Optionally Awarded Complete Plan Development Phase is awarded, it will be to the same vendor, at the sole discretion of BCPL. The award will not be made to two different vendors for the different phases.

- Qualifications, Experience, and Background: Experience, training, and education that is pertinent to the services requested for a Strategic Plan Consultant. Particularly, experience with community and staff engagement.
- Client History: Client list and history with references to contact from accounts worked within the past five (5) years as well as how these clients may be similar in scope to BCPL.
- Proposed Work Plan: The methods used for engagement and information gathering, and how the strategic planning process will be conducted, including how it can be customized to meet BCPL’s needs.
- Proposed Fee Arrangements: Complete costs for the Strategic Plan Consultant and all associated fees to be charged to BCPL.
- Selected vendors may be invited to make oral presentations, without cost to BCPL, to the staff members conducting the evaluation and scoring. The vendor representative(s) attending the oral presentation shall be technically qualified to respond to questions to discuss/clarify any and all aspects of the proposal.
- Additional approval from the Board of Library Trustees may be necessary.

Criteria for Selection	Points
Information Gathering and Framework Development Phase:	
Qualifications, Experience, Background	20
Client History	20
Proposed Work Plan	40
Proposed Fee Arrangements	20
Maximum Total for all Criteria	100

Criteria for Selection	Points
<b>Optionally awarded</b> Complete Plan Development Phase:	
Qualifications, Experience, Background	20
Client History	20
Proposed Work Plan	40
Proposed Fee Arrangements	20
Maximum Total for all Criteria	100

6.2 The proposals will be scored by staff that may include the Chief Executive Officer, Planning, Projects & Data Manager, Project Coordinator and/ or variety of internal and



## Summary Bid Information

external stakeholders. The proposals may also be scored by the Board of Library Trustees.

### **7. PRICING**

- 7.1. The total all-inclusive maximum price to be bid for the Strategic Plan Consultant is to contain all direct and indirect costs including all out-of-pocket expenses. The proposal is to include an itemized schedule and list of possible expenses related to this project.
- 7.2. The proposal may include additional services and deliverables not required in the Scope of Work as a benefit to the project, which may include itemized pricing. For example, the Scope of Work requires a minimum of 3 community input sessions. The proposer may elect to include itemized pricing for additional sessions and provide itemized costs for in person vs. virtual sessions.

### **8. INVOICING AND TERMS OF PAYMENT**

- 8.1. Invoices must be legibly prepared showing the full description and price of work performed. Invoices must be submitted to Purchasing, Baltimore County Public Library, 320 York Rd, Towson MD 21204.
- 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.
- 8.3. Baltimore County Public Library reserves the right to withhold payment for any service which is questionable and/or has not been properly documented.

### **9. INSURANCE AND BONDING**

- 9.1. The Strategic Plan Consultant shall be required to execute a certificate of insurance form and proof of bonding for theft within fifteen (15) calendar days of notice to award being given. Noncompliance may result in the contract being awarded to the next lowest responsive and responsible bidder.
- 9.2. The Strategic Plan Consultant shall be required to provide evidence of appropriate professional liability insurance, and errors and omissions insurance.

### **10. REFERENCES**

- 10.1. The Strategic Plan Consultant must provide a minimum of three (3) client references who can attest to the contractor's ability to provide the services and skills requested. References should be current (having taken place within the past five [5] years,) and the name of each references firm, contact person, and telephone number and email is required.
- 10.2. Should your proposal be selected a current W-9 will be requested.

Summary Bid Information

**11. TERMINATION**

- 11.1 BCPL reserves the right for Termination for Convenience and for Default as stated in Section I, Part 6.

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## Scope of Work

### 1. **GENERAL SCOPE OF WORK**

Baltimore County Public Library is looking for an experienced consultant to facilitate the Information Gathering and Framework Development Phase of the next 5-year strategic plan (FY27-FY31) for the library. The primary scope of proposals submitted should include staff engagement, community engagement, development of high-level goal areas, and a framework for the comprehensive strategic plan.

An optional Complete Plan Development Phase would include the development of the complete plan as outlined below under "Optionally awarded". The optional Complete Plan Development Phase **must** be bid separately. The optional phase is not required for a proposal to be considered. (BCPL will determine if the optional phase is awarded during bid selection.)

The end dates are fixed; December 2025 for the required work, April 2026 for the optional phase. The other dates below are guidelines that can be adjusted based on the details of the proposal.

#### **Information Gathering and Framework Development Phase:**

##### **Engagement & Information Gathering** July 2025 (latest) - October 2025

Working with the Planning, Projects & Data Manager, Project Coordinator, and a variety of internal and external stakeholders, the consultant will:

- Develop a comprehensive plan for staff engagement that will:
  - Incorporate consultant-facilitated interactive session(s) for approximately 400 BCPL staff, as well as sessions for executive staff and the Board of Library Trustees
  - Incorporate at least one asynchronous avenue for staff input
  - Engage staff from all levels of the organization in a positive, future-focused manner
  - Inform the development of updated mission, vision, values statements
  - Inspire staff to reengage with work on current strategic plan efforts
- Develop a comprehensive plan for community engagement that will:
  - Include a minimum of 3 community input sessions, to be facilitated by consultant and to include in person and virtual options
  - Include design and administration of an online survey or other asynchronous avenue for community input
  - Ensure representation from a variety of users and non-users, communities, demographics, languages, etc., reflective of the diverse makeup of Baltimore County
- Conduct an environmental scan, to include:
  - Detailed community profiles
  - An analysis of BCPL's services, market penetration, reputation, funding, etc.
  - An analysis of current strategic plan & progress

Note: Other input methods may be considered, as proposed by consultant; please detail costs separately and explain benefits in proposal.  
Note: all relevant data held by BCPL will be shared with the consultant. Consultant will be responsible for identifying and filling gaps in data, and providing this raw data to BCPL in an agreed-upon format.

- Provide as deliverables
  - By July 30, 2025:
    - A plan for staff engagement
    - A plan for community engagement and environmental scan

## Scope of Work

By October 15, 2025:

- A detailed summary of staff engagement findings
- A detailed summary of community engagement findings
- A comprehensive environmental scan report
- At least 2 options for updated mission, vision, values statements
- All raw data collected by consultant

### **Strategic Goal and Framework Development** October 2025 – December 2025

- Lead development of strategic priority focus areas, incorporating collected data and consultant-facilitated meetings/workshops with up to 3 internal stakeholder groups.
- Outline the structure for a comprehensive strategic plan that will include measurable objectives, strategies, and action items.
- Provide as deliverables

By December 15, 2025:

- Top-level strategic goals
  - A framework for inclusion of objectives, strategies, and action items.
- Provide at least 2 samples for each level of the outline.

### **Optionally awarded**

#### **Complete Plan Development Phase:**

#### **Development of Complete Plan** January 2026 – April 2026

The comprehensive strategic plan will be developed using the products of initial engagement and environmental scan. The consultant will:

- Facilitate the final selection of mission, vision & values statements with Board and/or Library Leadership Team
- Facilitate the development of measurable objectives, strategies, and action items, working with the staff planning team (by Feb 28)
- Prepare a visually engaging final document, per BCPL's brand style guide, that includes an overview of the process, community profile, select narrative and/or customer quotes, and the focus areas, objectives and strategies. Format must be digital and editable by BCPL graphics department.
- Prepare a clear, easy to understand summary document for staff that includes the focus areas, objectives & measurements, strategies, and action items.
- Incorporate any changes requested by the Board of Library Trustees during the approval process.
- Develop a tracking system for staff use, to facilitate ongoing measurement and reporting. Format must be digital, supported by BCPL's current platforms, and provide measurement data in a format suitable for BI reporting (specs will be provided) (by April 30)

## **CAPABILITIES AND SPECIFICATIONS**

1.1. The proposal should include a review of the following:

- Offer a structured narrative of the proposed work plan describing method to be used and how the Strategic Plan Consulting will be conducted.
- Furnish background information including qualifications and experience with providing Strategic Plan Consulting.
- Submit explanation of successful notable past performance of related work, including how this work may be similar in scope to BCPL's needs.

### Scope of Work

- Furnish resumes of fundamental personnel who will be responsible for the Strategic Plan Consulting.

## **2. ONCE AN AWARD IS MADE**

2.1. Once the bid is awarded all questions regarding work should be directed to: Emily Gamertsfelder, Planning, Projects and Data Manager, [egamertsfelder@bcpl.net](mailto:egamertsfelder@bcpl.net) 410-877-2336 and Kate Sigler, Project Coordinator, [ksigler@bcpl.net](mailto:ksigler@bcpl.net) 410-887-1915.

2.2. The awarded firm shall conform to all Federal, State, and Local Laws as well as those in place by the Baltimore County Public Library Board of Trustees.

Bid Reply Label

*CUT OUT AND  
SECURE TO THE  
OUTSIDE  
OF YOUR RESPONSE  
ENVELOPE.*

REQUEST FOR PROPOSAL

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Date: May 08, 2025, 3:00 PM (EDT)

RFP 2025-P-03

REQUEST FOR PROPOSAL  
STRATEGIC PLAN CONSULTANT

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TO: Baltimore County Public Library  
Purchasing Department  
320 York Rd  
Towson, MD 21204

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Technical Proposal

**1. COVER SHEET**

**To be submitted with both the Technical and Financial Proposal of your firm**

Firm/Company Name: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Title: \_\_\_\_\_

Mailing Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Telephone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Federal Tax ID Number: \_\_\_\_\_

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Signature \_\_\_\_\_ Date \_\_\_\_\_

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Print Name \_\_\_\_\_ Title \_\_\_\_\_



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Technical Proposal

**2. FORM OF PROPOSAL**

SUBMISSION OF A BID/PROPOSAL IN RESPONSE TO THIS SOLICITATION EVIDENCES THE BIDDER'S ACCEPTANCE OF THE TERMS AND CONDITIONS THEREIN. THIS PAGE MUST BE PROPERLY SIGNED BY THE INDIVIDUAL PROPOSAL OFFEROR OR BY AUHORIZED OFFICIAL IN THE FIRM ACKNOWLEDGING AND ACCEPTING ALL TERMS AND CONDITIONS OF THE REQUEST FOR PROPOSAL.

The undersigned, as Bidder declares that the only persons, company or parties interested in the Proposal as principals are named fully; that this Proposal is made without any connection directly or indirectly, with any other bidder for the same work; that it is in all respects fair and without collusion or fraud, and that no person acting for or employed by the Board of Library Trustees for Baltimore County, is or will be interested, directly or indirectly, in the performance of the Contract or the supplies relating to it or in any portion of the profits thereof; that he has carefully examined the annexed Instructions to Bidders, Contract Form, Specifications, therein referred to; that he has satisfied himself by personal examination of the site of the proposed work, and by such other means as he may have chosen as to the conditions and requirements of the Proposed work, and by such other means as he may have chosen, as to the conditions and requirements of the work; and that he proposes and agrees to that if this Proposal be accepted, he will Contract to furnish all materials and to perform all the work required in the manner prescribed in the annexed Contract, Specifications, and comply with all the stipulations therein contained; that he will complete the work hereunder within the time stipulated after being notified to proceed. The prices indicated in this Proposal cover all expenses including taxes, fees, etc., incurred in performing the work required under the Contract Documents of which the Proposal is a part.

Bid shall be valid for one hundred eighty (180) days.

Signature of Official: \_\_\_\_\_

Name (typed): \_\_\_\_\_

Title: \_\_\_\_\_

Firm: \_\_\_\_\_

Date: \_\_\_\_\_

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Technical Proposal

**3. PROCUREMENT AFFIDAVIT**

**3.1 AUTHORIZED REPRESENTATIVE**

I HEREBY AFFIRM THAT:

I am the [title] \_\_\_\_\_ and I am duly authorized to represent and bind [business] \_\_\_\_\_ (the "Business") and that I possess the legal authority to make this Affidavit on behalf of myself and the Business for which I am acting.

**3.2 AFFIRMATION REGARDING BRIBERY CONVICTIONS**

I FURTHER AFFIRM THAT:

Neither I, nor to the best of my knowledge, information, and belief, the Business, nor any of its officers, directors, partners, members, affiliates, or any of its employees directly involved in obtaining or performing contracts with public bodies (as is defined in Section 16-101(f) of the State Finance and Procurement Article of the Annotated Code of Maryland), has been convicted of, or has had probation before judgment imposed pursuant to Article 27, Section 641 of the Annotated Code of Maryland, or has pleaded nolo contendere to a charge of bribery, attempted bribery, or conspiracy to bribe in violation of Maryland law, or of the law of any other state or federal law, except as follows [indicate the reasons why the affirmation cannot be given and list any conviction, plea, or imposition of probation before judgment with the date, court, official or administrative body, the sentence or disposition, the name(s) of person(s) involved, and their current positions and responsibilities with the Business]:

**3.3 AFFIRMATION REGARDING OTHER CONVICTIONS**

I FURTHER AFFIRM THAT:

3.3.1 Neither I, nor to the best of my knowledge, information, and belief, the Business, nor any of its officers, directors, partners, members, affiliates, or any of its employees directly involved in obtaining or performing contracts with public bodies, has:

3.3.2 Been convicted under state or federal statute of a criminal offense incident to obtaining, attempting to obtain, or performing a public or private contract, fraud, embezzlement, theft, forgery, falsification or destruction of records, or receiving stolen property;

3.3.3 Been convicted of any criminal violation of a state or federal antitrust statute;

3.3.4 Been convicted under the provisions of Title 18 of the United States Code for violation of the Racketeer Influenced and Corrupt Organization Act, 18 U.S.C. §1961, et seq., or the Mail Fraud Act, 18 U.S.C. §1341, et seq., for acts arising out of the submission of bids or proposals for a public or private contract;

3.3.5 Been convicted of a violation of the State Minority Business Enterprise Law, Section 14-308 of the State Finance and Procurement Article of the Annotated Code of Maryland;

3.3.6 Been convicted of conspiracy to commit any act or omission that would constitute grounds for conviction or liability under any law or statute described in the above subsections;

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## Technical Proposal

3.3.7 Been found civilly liable under a state or federal antitrust statute for acts or omissions in connection with the submission of bids or proposals for a public or private contract;

3.3.8 Admitted in writing or under oath, during the course of an official investigation or other proceedings, acts or omissions that would constitute grounds for conviction or liability under any law or statute described above, except as follows [indicate reasons why the affirmations cannot be given, and list any conviction, plea, or imposition of probation before judgment with the date, court, official or administrative body, the sentence or disposition, the name(s) of the person(s) involved and their current positions and responsibilities with the Business, and the status of any debarment]:

### **3.4 AFFIRMATION REGARDING DEBARMENT**

I FURTHER AFFIRM THAT:

Neither I, nor to the best of my knowledge, information, and belief, the Business, nor any of its officers, directors, partners, members, affiliates, or any of its employees directly involved in obtaining or performing contracts with public bodies, has ever been suspended or debarred (including being issued a limited denial of participation) by any public entity, except as follows [list each debarment or suspension providing the dates of the suspension or debarment, the name of the public entity and the status of the proceeding, the name(s) of the person(s) involved and their current positions and responsibilities with the Business, the grounds of the debarment or suspension, and the details of each person's involvement in any activity that formed the grounds of the debarment or suspension]:

### **3.5 AFFIRMATION REGARDING DEBARMENT OF RELATED ENTITIES**

I FURTHER AFFIRM THAT:

3.5.1 The Business was not established and it does not operate in a manner designed to evade the application of or defeat the purpose of debarment pursuant to Sections 16-101, et seq., of the State Finance and Procurement Article of the Annotated Code of Maryland; and

3.5.2 The Business is not a successor, assignee, subsidiary, or affiliate of a suspended or debarred business, except as follows: [you must indicate the reasons why the affirmations cannot be given without qualification]:

### **3.6 SUB-CONTRACT AFFIRMATION**

I FURTHER AFFIRM THAT:

Neither I, nor to the best of my knowledge, information, and belief, the Business, has knowingly entered into a contract with a public body under which a person debarred or suspended under Title 16 of the State Finance and Procurement Article of the Annotated Code of Maryland will provide, directly or indirectly, supplies, services, architectural services, construction related services, leases of real property, or construction.

### **3.7 AFFIRMATION REGARDING COLLUSION**

I FURTHER AFFIRM THAT:

3.7.1 Neither I, nor to the best of my knowledge, information, and belief, the Business, nor any of its officers, directors, partners, members, affiliates, nor any of its employees, have in any way:

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Technical Proposal

3.7.2 Agreed, conspired, connived, or colluded to produce a deceptive show of competition in the compilation of the accompanying bid or offer that is being submitted;

3.7.3 In any manner, directly or indirectly, entered into any agreement of any kind to fix the bid price or price proposal of the bidder or offeror or of any competitor, or otherwise take any action to impact, restrain, or inhibit free competitive bidding in connection with the contract for which the accompanying bid or offer is submitted;

3.7.4 Colluded with anyone to obtain information concerning the bid that would give the Business an unfair advantage over others.

**3.8 POLITICAL CONTRIBUTION DISCLOSURE AFFIRMATION**

I FURTHER AFFIRM THAT:

The Contractor affirms that it is aware of, and will comply with, the provisions of Sections 14-101 through 14-108 of the Election Law Article of the Annotated Code of Maryland, that a person making or having a single contract with a single governmental entity involving cumulative consideration, of at least \$200,000.00 shall file an initial statement, and semi-annual statements as applicable, with the State Board of Elections certain disclosing applicable contributions of \$500 or more, or the lack thereof.

**3.9 CERTIFICATION OF REGISTRATION AND TAX PAYMENT**

I FURTHER AFFIRM THAT:

3.9.1 The Business is a (*Insert State Name*) (*example: Maryland, Ohio, Iowa*) (Select One: Corporation, Partnership, Limited Liability Company, Limited Liability Partnership, Sole Proprietor) (\_\_\_\_\_), that is registered in accordance with the Corporations and Associations Article of the Annotated Code of Maryland, that it is in good standing in the State of Maryland, and that it has filed all of its annual reports, together with filing fees, with the Maryland State Department of Assessments and Taxation, and that the name and address of its resident agent filed with the State Department of Assessments and Taxation is:

Name: \_\_\_\_\_

Address \_\_\_\_\_

If none, so state \_\_\_\_\_

3.9.2 Except as validly contested, the Business has paid, or has arranged for payment of, all taxes due the State of Maryland and Baltimore County, and has filed all required returns and reports with the Comptroller of the Treasury, the State Department of Assessments and Taxation, and the Employment Security Administration, as applicable, and will have paid all withholding taxes due the State of Maryland prior to final settlement.

**3.10 CONTINGENT FEES**

I FURTHER AFFIRM THAT:

The Business has not employed or retained any person, partnership, corporation, or other entity, other than a bona fide employee or agent working for the Business, to solicit or secure the Contract, and that the Business has not paid or agreed to pay any

## Technical Proposal

person, partnership, corporation, or other entity, other than a bona fide employee or agent, any fee or other consideration contingent on the making of the Contract.

### **3.11 NON-DISCRIMINATION IN EMPLOYMENT STATEMENT**

I FURTHER AFFIRM THAT:

During the performance of any contract awarded pursuant to the solicitation of which this affidavit is a part:

3.11.1 The Business will not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, national origin, marital status, sexual orientation, genetic information, or disability unrelated in nature and extent so as to reasonably preclude the performance of the employment, or because of the individual's refusal to submit to a genetic test or made available the results of a genetic test. The Business will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, age, national origin, marital status, sexual orientation, genetic information, or disability unrelated in nature and extent so as to reasonably preclude the performance of the employment, or because of the individual's refusal to submit to a genetic test or made available the results of a genetic test. Such action shall include, but not be limited to the following employment, promotion, upgrading, demotion or transfer, rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Business agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the owner setting forth provisions of this nondiscrimination clause.

3.11.2 The Business will, in all solicitations or advertisements for employees placed by or on behalf of the Business, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, age, national origin, marital status, sexual orientation, genetic information, or disability unrelated in nature and extent so as to reasonably preclude the performance of the employment, or because of the individual's refusal to submit to a genetic test or made available the results of a genetic test.

3.11.3 The Business shall send to each labor union or representative of workers with which the Business has a collective bargaining agreement or other contract or understanding, a notice, to be provided by the owner, advising the said labor union or workers' representative of these commitments, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

3.11.4 The Business shall furnish, if requested by the Library, a compliance report concerning our employment practices and policies in order for the Library to ascertain compliance with the special provisions of this affidavit concerning nondiscrimination in employment.

3.11.5 In the event of the Business's noncompliance with the nondiscrimination clause of this affidavit, the contract may be canceled, terminated, or suspended in whole or in part, and the Business may be declared ineligible for further Library work.

3.11.6 The Business shall include the special provisions outlined herein pertaining to

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Technical Proposal

nondiscrimination in employment in every subcontract, so that such nondiscrimination in employment provisions shall be binding on each subcontractor or vendor.

**3.12 ACKNOWLEDGMENT**

I ACKNOWLEDGE THAT this Affidavit is to be furnished to the Library and may be distributed to units of (1) Baltimore County; (2) the State of Maryland; (3) other counties or political subdivisions of the State of Maryland; (4) other states; and (5) the federal government. I further acknowledge that this Affidavit is subject to applicable laws of the United States and the State of Maryland, both criminal and civil, and that nothing in this Affidavit or any contract resulting from the submission of this bid or proposal shall be construed to supersede, amend, modify or waive, on behalf of Baltimore County Public Library, Baltimore County, or the State of Maryland or any unit of the State of Maryland having jurisdiction, the exercise of any statutory right or remedy at Law or in equity with respect to any misrepresentation made or any violation of the obligations, terms and covenants undertaken by the Business with respect to (a) this Affidavit, (b) the contract, and (3) other Affidavits comprising part of the contract.

I DO SOLEMNLY DECLARE AND AFFIRM UNDER THE PENALTIES OF PERJURY THAT THE CONTENTS OF THIS AFFIDAVIT ARE TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE, INFORMATION, AND BELIEF, AFTER DILIGENT INQUIRY.

Signature of Official: \_\_\_\_\_

Name (typed): \_\_\_\_\_

Title: \_\_\_\_\_

Firm: \_\_\_\_\_

Date: \_\_\_\_\_

Technical Proposal

Notary Seal

Notary: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

Technical Proposal

**4. Acknowledgement of Sample Contract and Addendum(s)**

4.1 Bidder acknowledges receipt of the Sample Contract Agreement and Addendum(s):

Sample Contract Agreement \_\_\_\_\_ Bidder's Initials \_\_\_\_

Addendum No. \_\_\_\_\_ Bidder's Initials \_\_\_\_

Addendum No. \_\_\_\_\_ Bidder's Initials \_\_\_\_

Addendum No. \_\_\_\_\_ Bidder's Initials \_\_\_\_

4.2 A sample of the Contract Agreement to be issued to the winning bidder of this RFP is posted on the BCPL website at: <http://www.bcpl.info/about-us/bid-opportunities>.

Print a copy of the Contract Agreement and include it with this page acknowledging you have reviewed the document and any published Addendum.

Financial Proposal

1. Fees

**SCHEDULE OF PROFESSIONAL FEES AND EXPENSES**  
**Strategic Plan Consultant:**  
**Information Gathering and Framework Development Phase**  
 (Complete the form below)

	Hours	Standard Hourly Rates	Quoted Hourly Rates	TOTAL
Consultant				
Staff (specify)				
Staff (specify)				
Other (specify)				
Total all-inclusive maximum price for Strategic Plan Consultant				

**SCHEDULE OF PROFESSIONAL FEES AND EXPENSES**  
**Strategic Plan Consultant: Optionally awarded Complete Plan Development Phase**  
 (Complete the form below)

	Hours	Standard Hourly Rates	Quoted Hourly Rates	TOTAL
Consultant				
Staff (specify)				
Staff (specify)				
Other (specify)				
Total all-inclusive maximum price for Strategic Plan Consultant				