

CITY OF BARTLESVILLE REQUEST FOR PROPOSALS

Strategic Planning Services

**Please Submit Eleven (11) Paper
Copies and One (1) Electronic PDF by:
December 6, 2021
2:00PM**

**City of Bartlesville
401 S Johnstone Ave.
Bartlesville, OK 74003**



**REQUEST FOR PROPOSALS (RFP):
STRATEGIC PLANNING SERVICES**

Estimated RFP Schedule

RFP Issued:	October 25, 2021
Final Date for Questions Related to RFP:	November 29, 2021
Proposal Deadline:	December 6, 2021
Applicant Interviews:	December 13-17, 2021*
Selection of Consultant by City Council:	January 3, 2022*

**Exact dates are subject to change at the CITY's discretion*

Any interested individual may request to be on an email list to receive updates on the RFP process, including addenda to the RFP if any are issued. The City of Bartlesville may alter the RFP at any time.

Submittal Instructions

Written proposals and an electronic PDF must be received by the City of Bartlesville no later than 2PM CDT on December 6, 2021. Proposals received after this deadline will not be accepted or considered.

Send proposals to:

Jason Muninger
City Clerk
City of Bartlesville
401 S. Johnstone Ave
Bartlesville, OK 74003

Direct questions regarding the RFP to:

Mike Bailey
City Manager
(918) 338-4282
mlbailey@cityofbartlesville.org

Introduction

The City of Bartlesville (CITY) is seeking proposals from consultants/firms to guide the CITY with the development of a comprehensive Strategic Plan. The CITY anticipates that the planning process will take several months to provide adequate time for participation by the project team and the City Council (COUNCIL) in addition to review by key community stakeholders. The outcome of the process will be a written strategic plan document that presents the planning process, the research, the analysis, opportunities and strategies along with an implementation plan that will guide the CITY for the next three to five years. Please note that this RFP requests the services of a consultant to facilitate the strategic planning process. The CITY is aware that there are a variety of perspectives, models, and approaches available to develop a strategic planning document; therefore, the successful firm should be able to discern which model or model(s) will best enable the City of Bartlesville to complete its organizational and programmatic goals. The successful firm will be required to demonstrate its ability to meet these requirements. The CITY encourages any inquiries with respect to the expectations and/or scope of work sought through this proposal by email to the CITY – Attention Mike Bailey, mlbailey@cityofbartlesville.org. All inquiries will receive a response.

A consultant/firm will be selected for this project based on criteria stated in “Evaluation of Proposals.” All proposals received by 2PM CDT on December 6, 2021 will receive full consideration.

RFP Process

It is expected that one (1) consultant will be selected as a result of the RFP, although the CITY is under no obligation to award a contract as a result of the selection process. Based on the proposals received, the selection committee (comprised of CITY staff and COUNCIL member(s)) will select individuals/firms to be interviewed. As a result of those interviews the top-rated consultant will be selected for contract negotiations.

Background

Bartlesville is a unique city in northeast Oklahoma. It is located within a 30-minute drive of Oklahoma’s second largest city, Tulsa. However, this city of 37,000 people does not define itself by this proximity. Instead, Bartlesville is recognized as the birth place of global energy companies (two of which still hold significant presences in Bartlesville), high skylines, world class cultural amenities, a vibrant downtown, and excellent schools.

The City of Bartlesville operates under a charter Council/Manager form of government with five (5) councilmembers elected by ward. The Mayor and Vice Mayor are elected by the COUNCIL from amongst themselves, and the COUNCIL hires the City Manager, who oversees the operations of the CITY.

The CITY has 22 departments that employ more than 360 full-time authorized positions and about 15 part-time positions.

The CITY has participated in and conducted a number of studies, assessments, and masterplans that are specific to the community. All of these can be found on the CITY's website and should be reviewed by all potential firms/consultants. Additional information and supporting materials can be found at <https://www.cityofbartlesville.org/community-development/planning/long-range-plans-reports/>

Scope of Services

As envisioned, the scope of services for this proposal will include the following components.

Visioning

1. The consultant(s) will facilitate a community visioning process. This process will consist of public meetings, stakeholder group sessions, outreach forums, online survey(s), social media, information booths at local events, discussions with CITY staff and other forums appropriate for outreach and public input. The result of these efforts will result in a robust array of suggestions from members of the community. The desired outcome is a vision for the community from community members and leaders which will include specific visioning goals that will serve as a framework for the strategic planning process. In anticipation of this project, the City of Bartlesville formed a project team to guide project direction and oversee project activities. The Consultant will work with this team to explain the strategic planning process, validate the CITY's project objectives for this effort as well as outline management, staff, and consultant roles and responsibilities for this effort. The Consultant will develop a work plan to guide project activities and communications. The Consultant will conduct orientation and briefing sessions for the COUNCIL and employees at all levels to educate them on the goals of the project and the potential outcomes. The consultant must also be available for any necessary presentations to the COUNCIL and/or project team to include but not limited to a final strategic plan presentation to the COUNCIL and/or project team.
2. Review current City of Bartlesville organizational information available on the CITY's website www.cityofbartlesville.org including department home pages, budget information, CITY ordinances, and other related documents and information.
3. Conduct a situational analysis of the City of Bartlesville organization.
4. Identify and assess the strengths, weaknesses, opportunities, and threats of the City of Bartlesville organization.

5. Based on the assessment data, facilitate the creation of Vision, Values, and Mission for the City of Bartlesville organization.
6. Facilitate the development of goals and objectives that support the Vision, Values, and Mission of the City of Bartlesville organization.
7. Facilitate the development of performance metrics – key indicators and outcomes that can serve as the basis for performance measures of the City of Bartlesville organization.
8. Identify potential strategic initiatives with outcomes that support community commerce, community collaboration, community condition and community character.
9. Facilitate the development of a process to keep the COUNCIL involved and engaged in a continual strategic planning process.
10. Facilitate the development of a process to keep employees involved and engaged in a continual strategic planning process.
11. Submit recommendations for appropriate implementation measures that CITY staff will need to take. Include proposed policies and administrative guidelines that will need to be in place to administer the comprehensive strategic plan. These policies and administrative guidelines should be specific in nature. Develop a system to measure the effectiveness of CITY activities in meeting the objectives of the comprehensive strategic plan. Ensure the measures are linked to the overall vision, mission, and goals of the CITY as a whole.

City Council Session Preparation

As necessary, the CITY envisions holding retreats dedicated to this effort. We seek input from Consultant/Firm to help structure and facilitate the event to maximize impact. Among topics that may be addressed at the retreats are:

Needs Assessment - Assessment of the values, strengths, weaknesses, and competencies of the CITY.

Program Inventory and Analysis - Inventory existing program offerings and partnerships to serve as a baseline to identify service gaps and opportunities for different delivery options, partnerships and collaborations.

Identification of Opportunities, Strategies and Vision - Creating a vision for the CITY which identifies its priorities, opportunities and strategies, and clarifies the CITY's role and confirms its mission and values.

Citizen Services – How can the CITY be structured and operate to maximize citizen services and sustain these services at a high level? How should these services be prioritized?

Information Gathering

During this phase, the Consultant will collect data and information to become more familiar with the City of Bartlesville. The Consultant shall perform a SWOT analysis to identify the CITY's strengths, weaknesses, opportunities and threats involving and relating to the organization. This effort should include determining the community's strengths, weaknesses, threats and assets, its resources, and other valuable insight in light of current trends and topics influencing and impacting the community. Such information may include, but should not be limited to, an inventory of CITY resources including its finances, infrastructure, staff, opportunities, a community inventory of people, education, health care, business development, job opportunities, housing, arts, culture, heritage, history, recreation, natural features, entertainment, geography, demographics, socioeconomics and technology.

The consultant will describe the methodology used to identify vital challenges and opportunities identified. In addition, an Action Plan will be developed to define implementation steps and techniques along with a schedule of target dates to further define the goals. Benchmarks or milestones will be identified to help measure the CITY's success in implementing the Strategic Plan. Development of initiatives to promote public involvement designed to engage the community, stakeholders and CITY leadership throughout the process is critical.

Report Review

At the end of this exercise, the consultant and the project team will draft a final plan document for review and presentation of the plan to the broader community. The consultant will be participating in review and refinement of this document. The CITY and the consultant will work collectively to develop a series of implementation techniques designed to keep community members, stakeholders, business leaders, CITY staff and CITY leadership engaged in the implementation of the identified goals, objectives and initiatives of the Strategic Plan. This process could be coordinated with an oversight or implementation committee tasked with meeting regularly to ensure the Strategic Plan remains a viable "living" project for the next three to five years. At a minimum, the consultant will provide the following deliverables:

1. A recommended package of material suitable for public distribution and outreach.
2. A final Strategic Plan document that includes an implementation plan with defined milestones and benchmarks intended to measure the CITY's progress.
3. An executive summary of the Strategic Plan.

Proposal Submission Requirements

1. Cover letter of interest and transmittal not to exceed two pages in length.
2. Legal name of the consultant firm, address, phone, fax, and email address, year the firm was established, and type of business.
3. An organization chart indicating roles of all individuals and firms involved in this project, as appropriate. Include brief resumes for all individuals identifying their qualifications and experience. The name of the person intended to be the project coordinator for this Strategic Plan and a list of recently completed projects relevant to the scope of this RFP.
4. A clear articulation to the firm's approach to be used in this project including a proposed schedule and description of the proposed methods of public involvement.
5. A summary of qualifications, related experience and references.
6. Proposed scope of work, project approach, and plan to accomplish the work. Describe in detail your firm's project approach and methodology in managing and implementing a project of this size and scope and experience of developing and supporting the implementation of a comprehensive strategic plan. Key elements include:
 - a. Project Understanding
 - b. Project Methodology and Deliverables
 - c. Roles and Responsibilities
 - d. Project Management
7. A minimum of three (3) examples of relevant written work related to strategic planning, with no less than one example, prepared on behalf of a local government organization or comparable entity.
8. Fee schedule and proposed fee to accomplish the work (separate, sealed envelope marked Fee Schedule).
9. Proposals must be complete to be considered by the evaluation committee.

Submittals may be mailed or delivered to Jason Muninger, City Clerk, City of Bartlesville, 401 S. Johnstone Ave., Bartlesville, OK 74003. Applicants must submit eleven (11) hard copies in a sealed envelope(s). The envelopes shall be clearly marked on the exterior to denote both the names of the submitting firm and the particular professional services contract for which the proposals are offered, "Strategic Planning Services". For items 1-6 under Proposal Submission Requirements must be limited to twenty (20) pages in length. All proposals should also be submitted as computer files in PDF format. Electronic files may be transferred via email to Jason Muninger at ismuninger@cityofbartlesville.org or provided on a portable electronic storage device. The CITY is not responsible for returning portable storage devices. Large files should be uploaded with a link to download files provided via email.

The CITY is not responsible for communication errors. Applicants are advised to call the City Clerk's office at (918) 338-4222 to confirm that a submittal has been received.

Evaluation of Proposals

The City of Bartlesville's project team will review and evaluate all properly submitted proposals that are received on or before the deadline. The project team will first review each proposal for compliance with the minimum qualifications and mandatory requirements of the RFP. Failure to comply with any mandatory requirements may disqualify a proposal. The project team shall participate in the analysis of RFPs, the interview process and the final recommendation of the selected consultant for the project. Upon successful negotiations with the selected consultant, the contract will be recommended for approval by the project team to the City Council for final approval.

The committee will rank proposals based on the criteria stated below:

1. Responsiveness of the Proposal to the project objectives.
2. Responding firm's experience in completing work of a similar size and scope.
3. Specific qualifications of the primary staff who will manage, supervise, and provide services, including past experience on projects of similar size and scope.
4. Public sector experience and qualifications of the firm. This includes past project experience and/or research projects conducted for recognized industry associations.
5. Proposer's project management methodology and experience.
6. Proposer's familiarity with the strategic planning needs of the City of Bartlesville.
7. Responses of the client references.

8. Project approach and methodology.
9. Cost of services and payment policies.
10. Such other information that may be required or secured.

City of Bartlesville Rights

The City of Bartlesville reserves the right to reject any or all proposals, make counter proposals and/or engage in negotiations with any or all firms or individuals, waive any requirements or otherwise amend this RFP, or cancel the RFP in order to achieve the CITY's goals and objectives for this project. Any changes in the status of the RFP will be brought to the attention of all parties that provide contact information for updates. The information contained in this RFP represent the CITY's best information at the time of the release of the RFP and the CITY reserves the right to modify any term or condition contained herein.

Responsibility for Proposal Preparation

Except as otherwise specifically agreed to in writing by the CITY, each consulting individual or team submitting proposals shall provide and pay for all materials, labor, transportation, charges, levies, taxes, fees or expenses incurred, including all costs to prepare a response to this RFP, travel and presentation costs, and all other services and facilities of every nature whatsoever necessary for the preparation of the RFP.

It is neither the CITY's responsibility nor practice to acknowledge receipt of any proposal as a result of the RFP process. It is the proposer's responsibility to assure that a proposal is delivered and received in a timely manner.

No Conflict of Interest

No member of the City Council, member of the evaluation committee for this RFP, and any other officer, employee or agent of the City of Bartlesville who exercises any functions or responsibilities in the selection of a proposal, shall have any personal interest, direct or indirect, in the project.

Open Records/Proprietary Information

The City of Bartlesville recognizes that in responding to this RFP, the proposer may desire to provide proprietary information in order to clarify and enhance their response. To the extent permitted by law, the City of Bartlesville will keep confidential such information.

Responders should note that the City of Bartlesville is a municipality, and as such its files are available for public review pursuant to the Title 51, Oklahoma Statutes §24A.1-24A.29.