



# **REQUEST FOR PROPOSAL**

**FOR A**

**CONSULTANT**

## **BLACK GOLD COOPERATIVE LIBRARY SYSTEM**

**ARROYO GRANDE, CALIFORNIA**

<b>Date of Issuance</b>	<b>December 18, 2017</b>
<b>Date for written inquiries</b>	<b>January 5, 2018</b>
<b>Proposal receipt date and time</b>	<b>January 23, 2018, 5:00 PM PDT</b>

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## **Introduction**

The purpose of this RFP is to identify a consultant with whom the Black Gold Cooperative Library System will work to review the System's funding contribution formula and provide sustainable options for updating the formula.

### **1. Background Information**

The Black Gold Cooperative has been in existence since 1964. It was formed with the idea of sharing resources among public libraries on the central coast of California. The current members of the cooperative are Blanchard/Santa Paula Library District, Santa Barbara Public Library, Lompoc Public Library, Santa Maria Public Library, County of San Luis Obispo Public Libraries, and Paso Robles Public Library. A seventh jurisdiction, Goleta Public Library, is expected to join as of July 1, 2018. Black Gold is governed by an Administrative Council (AC), and the director of each member library is the representative.

The members share an Integrated Library System (ILS), Polaris. The combined catalog of over 1,000,000 items allows patrons from any library to place a request for items owned by any one of the members. A delivery service moves books among the six main jurisdictions three days a week. Over 500,000 items move through the delivery service each year and that number has been increasing in recent years.

Black Gold (BG) staff provides technical, network, and cataloging services for the Polaris system. Other services provided are delivery, contract management, coordination of downloadable audiobook and eBook products, project planning and implementation, and administration.

### **2. Financial**

For FY2017/18, the Cooperative has a budget of \$1,801,000. Most funds come directly from the members. State funding had contributed significantly towards the annual budget for many years, but is now a small portion, \$150,000 this FY. Black Gold has reasonable reserves that have been left mostly untouched.

### **3. Project Need**

The current contribution schedule was created after being identified as a strategic planning objective in 2013. It differs significantly from the previous formula and is composed of Use and Resource factors. Those are further broken down into Circulation, Patron Count and Network Devices. There is also a Pro-Rata portion of the formula using Holdings and Patron Count, meant for members which do not share the ILS (of which there are none at this time.)

We would like to redefine the contribution formula with factors that reflect current library conditions, potentially including increased use of downloadable formats and cost drivers. The new formula should be:

- Simple and easily explainable
- Transparent – using standard data, justifiable and consistent
- Equitable – fair and equal
- Reflect use of Black Gold resources

#### **4. Scope of the Work**

##### Tasks:

During the project, we anticipate the selected consultant to meet individually with each library director in the cooperative to understand their point of view and get input on what factors they think should be factored into the contribution formula. In addition to individual meetings, a meeting with the Council as a whole would be expected to arrive at general consensus.

The consultant would then use information collected in these meetings, along with background, financial and historical data provided by Black Gold staff, to analyze potential changes to the formula. It is anticipated they would have information about or poll other consortium of similar size and makeup on their contribution schedules as a comparison.

##### Reports:

The completed project would include a report with suggested changes to the BG contribution formula, potentially including a component that incorporates shareable materials. Consideration of whether or not the same formula should be used for all services, or if there should be different formulas applied should be evaluated.

##### Meetings:

The consultant should plan on one meeting with each director at their library or by telephone. Members of the Budget, Finance and Insurance (BFI) subcommittee will be consulted as necessary, utilizing email and telephone. Finally, there should be a presentation to the full Administrative Council to present results towards the end of the project.

##### Timeline:

This project would be completed by May 30, 2018.

- February – Selection of consultant
- February/March – BG provides background materials as needed
- March/April – consultant meets with Administrative Council members individually and as a group
- May – analysis and recommendations, presentation to Administrative Council

## 5. Required Proposal Format:

The consultant should provide a proposal which includes the following categories:

- a. Understanding of the Project – provide an overview of the project, its purpose and expected outcomes.
- b. Statement of work – provide specific details of the project and how it will be carried out. Tasks should be listed with details on deadlines. A summary timeline should be included.
- c. Experience, Credentials and Qualifications – provide professional background information here. If other individuals will be working on this project provide their information as well.
- d. References – provide names of other libraries for which you have done work and contact persons.
- e. Costs – provide a breakdown of all costs and total bid, including travel and other costs.

## 6. Overview of RFP Procedure

Proposals must be received by 5:00 pm PDT, January 23, 2018. They may be sent via email to [mtheobald@blackgold.org](mailto:mtheobald@blackgold.org) or mailed to:

Maureen Theobald  
Black Gold Cooperative Library System  
580 Camino Mercado  
Arroyo Grande CA 93420

The following is a proposed timetable for the RFP process and key project events:

RFP issued:	December 18, 2018
Deadline for written inquiries:	January 5, 2018
Due date and time for receipt of proposals:	January 23, 2018
Consultant selection:	February 2018
Project begins:	February 2018
Project completion:	May 2018

## **7. General Instructions to Vendors**

Written questions concerning the process contained in this RFP may be directed to the following address:

Maureen Theobald, Executive Director  
Black Gold Cooperative Library System  
580 Camino Mercado  
Arroyo Grande, CA 93420  
Email: [mtheobald@blackgold.org](mailto:mtheobald@blackgold.org)

BG reserves the right to reject any and all proposals without penalty, to waive all technicalities and irregularities and deviations of proposals from this RFP, and to be the final judge as to which is the best overall proposal, and select the consultant whose proposal is considered to be in the best interest of BG.