REQUEST FOR PROPOSAL

Community-Wide Survey

Issue Date: March 25, 2016
Due Date: April 22, 2016

Project Contact:

Susan Banks
Communications Manager
847-810-3672 or bankss@cityoflakeforest.com
The City of Lake Forest, Illinois
www.cityoflakeforest.com
REQUEST FOR PROPOSAL
Community Wide Survey
March 25, 2016

Submittals Due Friday, April 22, 2016 at 4:00 P.M. CST

I. INTRODUCTION
Community Information Overview

Lake Forest, Illinois, is located 30 miles north of Chicago with an area of approximately 17 square miles, and is home to 19,375 people according to the 2010 Census. The City of Lake Forest was incorporated as a city under a special charter granted by the Illinois State Legislature in 1861 that permits Lake Forest to be administered efficiently and economically with a minimum number of separate government bodies. The City Council is the legislative and policy-making body and includes the Mayor and two Aldermen from each of the City's four wards.

The City operates under the council-manager form of government with the day-to-day operations of the City in the hands of a full-time, professional City Manager who is appointed by the Mayor with the approval of the City Council.

Residents are provided excellent educational opportunities through the public and private elementary and high schools, as well as Lake Forest College and the Lake Forest Graduate School of Management.

With its natural beauty every season, Lake Forest is a remarkable community because of the individuals who call it home. Lake Forest is an exceptional place. Its natural beauty, special characteristics and generous residents create a wonderful environment in which to live. It is a city that values its rich heritage, offers high quality educational opportunities, and preserves its historic structures and natural open spaces.

In addition to the many services it offers to the community, the City provides excellent facilities for seniors and youth (CROYA), offers a state-of-the-art fitness center, Recreation Center, Art Center, 18-hole golf course and operates its own library, water plant and cemetery.

The City’s most recent Strategic Plan (2013-2018) focused on Fiscal Stewardship, Community Character/Livability, Environmental Stewardship, Community Infrastructure, Human Capital and Service Delivery and Economic Vitality.

History and Preservation
Present-day Lake Forest is physically distinctive not only because of its picturesque street plan, but because of the early date when it was platted. The Lake Forest plan, platted in 1857, is notable because its architect, the landscape gardener Almerin Hotchkiss. The general concept reflected in the Hotchkiss plan is of the city in a park, with its streets laid out in an organic manner that takes into account such natural features as the ravines and lake bluffs, instead of forcing the street plan into a formal gridiron plan.

Lake Forest is equally famous for the many notable persons who chose to make their permanent or summer homes there. By World War I, the list of property owners in Lake Forest read like a Who's Who of the rich and famous in Chicago. In addition, Lake Forest is also noted for the quality and character of its architecture whether erected for residential, religious, educational or public purposes. Although the names of some of the earliest architects working for Lake Forest clients are still unknown, it is probable they were among the foremost of their profession practicing in Chicago. It is these same factors that give Lake Forest its historical significance, that also make the estate areas of residential Lake Forest historically and visually distinctive. In addition, it was the concentration in Lake Forest, probably more so than in any other community west of the Hudson River, of a vast assemblage of impressive estates laid out by important architects for some of most influential families of Chicago that makes both Lake Forest and its estates especially significant. Coupled with its unusual location high on the bluffs overlooking an inland sea, and its equally rare early picturesque plan, Lake Forest is a unique place of special historical and physical distinction.
II. **OVERALL PROJECT OBJECTIVES**

The City of Lake Forest is soliciting proposals from qualified vendors to assist in the development and administration of a comprehensive community-wide survey upon which an updated Strategic Plan can be formulated. The City conducted community-wide surveys in 1999, 2006 and 2011. The intent of this request for proposal (“RFP”) is to obtain the best qualified, responsible firm to perform the scope of work being requested.

III. **SCOPE OF WORK**

The final project scope, responsibilities, and tasks will be determined with the preferred vendor who is selected. The successful vendor will need to demonstrate ability to perform the following scope of services:

- Present and implement current best practices in municipal survey work;
- Work collaboratively with The City of Lake Forest, composed of City Staff and Elected Officials, to determine the survey methods and questions;
- Develop survey questions and sequencing;
- Create the format and survey tool;
- Assist in drafting survey-related communications for City publication;
- Administer the survey tool;
- Enter and tabulate results;
- Present results including level of statistical accuracy;
- Keep records in a format endorsed by the City;
- Compile comprehensive and summary results reports as determined by the City;
- Present summary findings at a City Council meeting.

There are approximately 8,500 residences and Post Office boxes in the City of Lake Forest. The community-wide survey will be available online and mailed to every resident/homeowner. We believe our survey will also require electronic and written tabulation of the results. The City will pay for the printing and postage needs.

The City’s goal is to select a Vendor in early September, so that work can begin immediately on the survey process and tool development. We have targeted survey administration no later than November 14, 2016, (after the Presidential Election) and would like results presented to the City Council in January of 2017. Onsite meetings and regular communication with the City will be required throughout the project.

IV. **PROPOSAL FORMAT & SUBMITTAL REQUIREMENTS**

Certain basic requirements must be met to insure that adequate information is being offered to The City of Lake Forest for consideration as outlined in the following paragraphs. Respondents
to this RFP are encouraged to provide any additional information that they believe will enhance their submittal and help The City of Lake Forest evaluate their capability.

A. **Cover Letter**  
A brief cover letter expressing interest in providing professional services in connection with the proposed Project and summarizing key points of the RFP.

B. **Firm Description and Project Approach**  
A description of the Firm’s history, current number of employees, contact information, methodology proposed to conduct the Community Survey including objectives, processes, procedures and end product.

C. **Staffing Plan and Resumes**  
Provide information about the Project team, including:

1. The qualifications for all professional staff members who will work on the Project should be discussed.
2. A description of any special requirements or innovations needed or suggested for completion of the Project.
3. A description of which portions of the work will be executed by subcontractors or subconsultants, and a list of those proposed for the Project.

D. **A project schedule shall be provided identifying beginning and ending dates for each phase of work.**

E. **A project budget shall be provided including the total cost as well as an itemized breakdown of the compensation required to accomplish each phase outlined in the proposal. A price proposal should be submitted, and should have specific task cost estimates as well as a not-to-exceed overall cost, including the items outlined below. If there are additional items you believe are necessary to successfully achieve the objective and are not listed, please include and specify those. Please also call attention to any work that would be considered out of scope in your Pricing Proposal.**

1. Work collaboratively with the City to understand the survey objective and community background information;
2. Develop the City’s customized survey tool, assuming a survey of approximately 4 pages in length (identify any limitations on number of iterations or time to develop);
3. Finalize the survey questions, sequence, and prepare the final format;
4. Assist in drafting survey-related communications for publication;
5. Prepare the mailing using the City’s water billing database;
6. Administer the survey mailing and any pre- or post-survey mailings (this cost estimate should have any related printing or postage costs as a separate line item), including both a paper and online completion option for approximately 8,500 households;
7. Enter and tabulate all results;
8. Compile an executive summary results report;
9. Prepare a detailed analysis results report through collaboration with the City, including demographic and geographic cross-tabulations (specifying any limitations on the extent);

10. Present summary findings in-person at a City Council meeting.

F. Experience and Reference List
   This section should provide a corporate resume or statement of qualifications with respect to recent relevant experiences on similar projects. Including:

   1. Brief description of three (3) similar projects that have been completed within the past three (3) years.
   2. Provide a list of clients for whom similar types of work have been performed. The list should include the project name and description of the type of work it involved, the client name, address, phone number, and a contact name.
   3. If the Firm is proposing a joint venture for the Project, list other projects, if any, that the Firm has worked on together with the proposed partner.

V. RFP Submittal Format

Proposer shall submit a sealed envelope or box containing one (1) original, three (3) copies and one electronic copy (in .pdf format on a compact disk or flash drive) in Word Format in a clear, concise format, on 8½” x 11” paper no later than 4:00pm CST on Friday, April 22, 2016. Each tabbed set shall contain all the information required herein to be considered for award. Omission of required data may be cause for disqualification. Any other information thought to be relevant, but not applicable to the enumerated sections, should be provided as an appendix to the statement of qualifications submittal.

Responses must be submitted to:

Susan Banks

Communications Manager

The City of Lake Forest

220 E. Deerpath, Lake Forest, IL 60045

RFP ON: COMMUNITY WIDE SURVEY

Only one proposal may be submitted by each Proposer.
VI. **Basis for Evaluation of Proposals**

Qualified firms interested in providing the services described herein are invited to submit a complete proposal for consideration. All Respondents will be evaluated by a Selection Committee comprised of City staff in accordance with the evaluation criteria specified below. The Committee’s selection of the preferred firm will be subject to the approval of the City of Lake Forest City Council.

Proposals will be evaluated on a total score basis, with a maximum score of one-hundred (100) points. The following criteria will be used in the evaluation process to determine the successful respondents, which will proceed to the interview stage:

<table>
<thead>
<tr>
<th>GRADING CRITERIA VALUE</th>
<th>VALUE</th>
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<tbody>
<tr>
<td>1. Firm’s qualifications, background and prior experience in conducting similar surveys.</td>
<td>25</td>
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<td>2. Technical approach and understanding of the scope of the project</td>
<td>20</td>
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<td>3. Firm’s ability to meet schedules, budgets, &amp; results achieved with similar projects</td>
<td>20</td>
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<td>4. Overall project design and methodology</td>
<td>20</td>
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<td>5. Professional qualifications of key personnel, references</td>
<td>15</td>
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<tr>
<td><strong>Total Points</strong></td>
<td><strong>100</strong></td>
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VII. **RFP Process Timeline (Tentative and Subject to Change)**

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<thead>
<tr>
<th>DATE</th>
<th>ACTIVITY</th>
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<tbody>
<tr>
<td>March 25, 2016</td>
<td>Request for Proposals sent to potential firms and advertised. Please confirm that you have received via email to Susan Banks at</td>
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<tr>
<td>Date</td>
<td>Event</td>
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<tr>
<td>April 8, 2016</td>
<td>Deadline for Questions from Prospective Respondents</td>
</tr>
<tr>
<td>April 13, 2016</td>
<td>Answers from City Distributed</td>
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<tr>
<td>April 22, 2016</td>
<td><strong>Deadline for RFP Submission.</strong></td>
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<tr>
<td>4:00 PM CST</td>
<td>Proposals received after the date and time identified will be returned unopened</td>
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<td>The City of Lake Forest</td>
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<td>220 E. Deerpath, Lake Forest, IL 60045</td>
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<tr>
<td>April 25 – May 6, 2016</td>
<td>City evaluates RFPs, conducts interviews with consultants</td>
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<tr>
<td>May 16, 2016</td>
<td>City Recommendation Presented to City Council</td>
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<tr>
<td>May 18, 2016</td>
<td>City enters into Agreement with Consultant</td>
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**VIII. Questions**

Questions concerning the Project, RFP, and elements discussed herein, may be directed to Susan Banks, Communications Manager, at 847/810-3672 or via bankss@cityoflakeforest.com.