



REQUEST FOR PROPOSAL

Library Services Needs Assessment
for the Village of Pinehurst, North Carolina

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I. Statement of Need

The Village of Pinehurst seeks to understand the need and demand for library services by its residents.

II. Scope of Work

The Village of Pinehurst is seeking a consultant (which may be a single firm or a consultant team consisting of individuals and/or firms with specialized expertise) to conduct a Library Services Needs Assessment. The consultant will compile and analyze data and information collected and obtained through research, investigation, and community outreach to quantify the need and public demand for library services in Pinehurst.

This assessment will be based on extensive community input and a thorough understanding of the universe of existing and future library services and their applicability to the residents of the Village of Pinehurst. The assessment will prioritize and document the community's interest in those services and document the various options to deliver those services, both in terms of facilities and methodology. The assessment will consider current and projected demographics and population trends. Finally, the Library Services Needs Assessment should evaluate the need for physical facilities (either new and/or enhancements to current facilities) to deliver the documented required library services. The characteristics of such facilities should be described such as potential size, locations, staffing requirements, information technology requirements, and furnishing needs. The potential operating and capital costs of these needs should be quantified in the final Library Services Needs Assessment Report.

As a result of this study the Village of Pinehurst will gain an understanding of library services appropriate to residents and the requirement for new and/or upgraded facilities to satisfy these needs.

Village of Pinehurst staff, augmented by representatives from the Given Memorial Library, will provide the consultant with additional information as needed and will meet with the consultant on a regular basis to facilitate the collection of public input and review interim work products. Village of Pinehurst staff will be the primary consultant contact for the needs assessment.

The final scope of work will be developed in collaboration with the selected consultant. The scope of work requested, at a minimum, will include:

1. **Review Existing Conditions and Identify Best Practices:** The consultant will seek to understand the existing environment and the community's use of library services. The consultant will also identify best practices for library services to include:
 - Review existing library utilization rates, relative to other communities of similar size and demographics.
 - Review library program and event attendance.
 - Review population and demographic historical trends and projections.
 - Review relevant planning documents and reports (e.g. strategic plans, etc.).
 - Identify the existing amount of space for children, teen, and adult programs and services such as research, studying, testing, and meeting spaces.
 - Assess services currently available at Given Memorial Library as well as other publicly run library facilities in nearby communities.

- Review reports and other information compiled by Village and library staff.
- Examine successful library services in communities with similar demographics.
- Identify library services industry standards and best practices.
- Identify future library services that may be applicable.



2. **Solicit Broad Community Input:** An effective and authentic participation by residents of the Village of Pinehurst is important to developing a fair and representative Library Services Needs Assessments. The consultant’s public engagement strategies must consistently include dialogue associated with the cost of delivering potential service enhancements. The consultant is expected to work with Village staff to formulate and execute an innovative and inclusive public engagement strategy. The public engagement strategy should be designed to ensure broad community input by a representative demographic that determines the community’s desires and realistic needs for improved or expanded library services.

Public outreach methods may include, but are not limited to:

- Surveys to determine, 1) resident desires and needs for library services and satisfaction with existing services, 2) resident interest in expanding current and support for potential future services, 3) resident interest in utilizing services of other local publicly operated libraries, and 4) how a library might meet resident needs in creative ways.
- Focus group meetings, community meetings, and other stakeholder meetings.
- Other methods to solicit input through local social or event gatherings.

3. **Conduct the Needs Assessment and Formulate a Recommendation:** The consultant will compile and analyze the data and information collected and obtained through research, investigation, and community outreach to quantify the need and public demand for library services in Pinehurst. In addition, the consultant will identify and evaluate alternative strategies such as: collaborating with other government operated libraries locally; expanding existing library facilities; combining library services with Village Parks and Recreation department offerings; relocating current library services to an existing facility; constructing new facilities, etc. Finally, if expansion and/or relocation is recommended, the consultant should indicate the following:

- Recommended library facility size, in square feet.
- Staffing requirements including full-time and volunteer staffing for each suitable location.
- Critical information technology and furnishing requirements.
- Projected initial capital and ongoing operating costs for each suitable location.
- Potential funding strategies (e.g. grants, municipal funding, tax credits or private resources).

4. **Prepare and Deliver a Written Library Services Needs Assessment Report:** The consultant will prepare and deliver a written Library Services Needs Assessment report summarizing existing conditions, best practices, community input, research and analysis performed, solutions evaluated, and a final recommendation. The consultant will present the Final Library Services Needs Assessment report to the Pinehurst Village Council in a public meeting.

III. Existing Library Background

Currently, the Given Tufts organization, which is a separate not-for-profit corporation, provides public library services in the Village Center through the Given Memorial Library at no cost to patrons. An annual financial contribution from the Village of Pinehurst aids the provisioning of public library services through a contractual relationship. The Given Memorial Library shares its current facility with the Tufts Archives. Representatives of the Village of Pinehurst and the Given Memorial Library formed a Library Working Group in January, 2018 to identify potential solutions for the lack of collections and program space to accommodate the needs of a growing community. This group met over the course of one year to formulate recommendations on how to improve library services and evaluate the need for expansion.

The Given Library has partnered with the Village of Pinehurst in this assessment of current and potential future library services for the community.

In January, 2019, the Pinehurst Village Council approved the Library Working Group’s recommendation for the Village of Pinehurst to conduct a formal Library Services Needs Assessment to determine the community’s desires and needs for future library services. Therefore, the Pinehurst Village Council is soliciting proposals from qualified firms to conduct a library needs assessment for the Village of Pinehurst.

This assessment should engage the community to identify its desired vision for the future of library services, identify priorities for improvement, evaluate the potential roles of both the Village of Pinehurst and the Given Memorial Library, and articulate strategies to address those roles and priorities. The Library Needs Assessment should also compile findings from the community including the desired levels of library services and programs, both existing and future.



The firm performing the Library Services Needs Assessment will work directly with Village of Pinehurst staff to coordinate the needs assessment and ensure extensive public input is obtained throughout the process. Members of the Library Working Group, including representatives of the Given Memorial Library, will be available to provide assistance as needed.

IV. Library Services Needs Assessment Deliverables Required

The consultant preparing the Library Services Needs Assessment shall be required to provide the Village of Pinehurst with the following deliverables:

1. Surveys or questionnaires used to solicit public input, along with a summary of survey results.
2. Summaries of input obtained from focus group meetings, neighborhood meetings, stakeholder meetings or other public input methods.
3. A Draft Library Services Needs Assessment for review prior to the presentation of the Final Library Services Needs Assessment.
4. 15 copies of the Final Library Services Needs Assessment.
5. All deliverables shall be provided in digital copy and shall be in the following formats: PDF, MS WORD, MS EXCEL, or MS POWERPOINT.

V. Proposed Project Timeline

It is the desire of the Village that the Library Services Needs Assessment be completed in an approximately 4-month time frame after the selection of the consultant and subsequent discussions regarding details and logistics. A proposed project timeline shall be prepared and submitted as a requirement of the proposal.

VI. Proposal Requirements

The following materials must be included in the proposal and received by 5:00 pm (EDT) on July 5, 2019 for a proposing consultant to be considered.

During the evaluation process, however, the Village of Pinehurst shall reserve the right to request additional information or clarifications from a consultant, or to allow corrections of errors and/or omissions. The purpose of the technical proposal is to demonstrate how the consultant, as a team and/or as individuals, will contribute to the Library Services Needs Assessment. The substance of the proposal will carry more weight than form or manner of presentation; the proposal should be complete and concise. Specific proposal requirements include:

1. **Title Page:** Title page showing the following: request for proposal's subject; the consultant's name, address, telephone and email address of the contact person; and the date of the proposal.
2. **Transmittal Letter:** A signed letter of transmittal briefly demonstrating the consultant's understanding of the work to be performed, committing to perform the work within requested time period, explaining why the consultant believes it is best qualified to perform the services, and stating that the proposal is an irrevocable offer.
3. **Statement of Qualifications:** Submitted materials should demonstrate the qualifications of the consultant and of the particular staff assigned to this engagement. The consultant should demonstrate experience on at least (3) similar projects, preferably within the past five (5) years. The consultant should be prepared to provide copies of or electronic links to the work product from these projects.
4. **General Information:** Provide general information and a brief history of the consulting firm. Include information for the prime and any sub-contractors proposed for the project.
5. **Introduction and Executive Summary:** Provide the following information concerning the consulting firm:
 - Firm name, business address, telephone number, fax number, and email address.
 - Year the consulting firm was established (include former names and year established, if applicable).
 - Type of ownership and parent company, if any.
 - Project manager's name, mailing address, and telephone number, if different from Item 1.
 - Key facts and features of the proposal, including any conclusions, assumptions, and recommendations.
6. **Project Understanding:** Include a summary of the consultant's understanding of this project as described in the Scope of Work. Discuss and clearly explain the methodologies proposed to complete the required services on this project. The respondent must document a clear understanding of the RFP's entire scope of work and project intent for the Library Services Needs Assessment.

7. **Project Approach:** Include an overall summary of the project approach with key milestones clearly identified for each phase of the project. Respondents shall also include the following information in the detailed explanation of their project approach:
 - Public engagement strategy, including the number and type of public outreach methods and public participation processes to be utilized.
 - Data and information to be collected during the project (e.g. library utilization rates, best practices, industry standards, etc.).
 - Description of proposed techniques and methodologies to assimilate and correlate data and information obtained during the assessment.
 - Description of how the consultant will leverage technology throughout the Needs Assessment project.
8. **Personnel Qualifications:** For each member of the project team assigned to this engagement, please provide the following information:
 - Identification of the project manager who will lead the project, can negotiate a contract, and can execute a contract.
 - Names and proposed roles of other individual team members.
 - Qualifications of all team members to perform the work requested, including education and prior relevant experience in their assigned functions.
9. **References:** Include a list of clients where similar services were (or are currently being) provided by members of the project team along with the name, telephone number, and email address of a person who may be contacted at that client.
10. **Proposed Work Plan and Tasks:** Provide specific approaches, methods, and assumptions that will be utilized to accomplish each work item in the Scope of Work.
11. **Project Timeline:** Provide a proposed project timeline from project initiation to completion. The timeline should include a list of key tasks within each phase, key milestones with approximate dates, and deliverables (draft and final) in each phase.
12. **Compensation/Fee Schedule:** The consultant shall break out the cost as follows:
 - Proposed itemized cost for items included in the Scope of Work and Deliverables Sections as well as incidentals and travel.
 - Provide a fee schedule for additional costs the Village would be charged if the Village requests services beyond those described in the Scope of Work and Deliverables Sections.
 - Provide hourly rates for all consultant employees who are expected to work on the project. These rates shall be the agreed upon rates for any additional services requested by the Village of Pinehurst. These rates shall remain constant during the course of this project.
 - If multiple consultants are collaborating on the RFP submittal, please identify the specific segment of the scope for each assigned consultant and the associated pricing.

The Village prefers a firm, fixed contract price with incidental costs, such as travel, billed separately from the fixed contract price and up to a maximum spelled out in the contract.

Proposals submitted must adhere to a 30-page maximum limit and contain 1 inch margins with the main body of the text in Arial 10-point font.

VII. Selection Process, Criteria, and Submission Instructions

Shortly after the proposal submission deadline, a Selection Panel will evaluate and rank each proposal using the following criteria:

1. Understanding of the Scope of Work and project objectives.
2. Creativity, clarity, and usefulness of proposed assessment methodologies and techniques.
3. Public engagement processes and innovative outreach methods.
4. Strength and relevance of previous similar experience with projects of a similar scope and scale.
5. Qualifications and experience of key personnel on the proposed team.
6. Completeness of proposal submitted (i.e. proposal meets proposal requirements).
7. Schedule and appropriate allocation of project staff and resources per work category.
8. Proposed project cost.

The Selection Panel will then check references provided for the top ranking proposals. Based on the ranking and information received during reference checks, the Selection Panel will recommend up to three consulting firms for the Village Council to interview. Members of the Selection Panel will contact the consulting firms recommended and schedule a mutually agreed upon oral presentation date and time.

The Village Council will interview the recommended consulting firms in late July or early August 2019 and make a final selection based on the information provided in the proposal and presentation. Once the Village Council has selected a consulting firm, the Selection Panel and consulting firm will negotiate the cost of the project and develop mutually agreed upon contract documents for Village Council approval.

Interested firms should submit one electronic PDF copy of the completed proposal and may choose to submit up to six (6) paper copies **by 5:00 pm (EDT) on July 5, 2019 to:**

Natalie Hawkins, Assistant Village Manager
Village of Pinehurst
395 Magnolia Road
Pinehurst, NC 28374
910-295-1900 ext. 1103
nhawkins@vopnc.org

Village staff will provide written receipt verification of submitted proposals.

VIII. Proposal Terms and Conditions

- A. This RFP does not commit the Village to award a contract. No other party, including any proposer, is intended to be granted any rights hereunder. Proposals which, in the sole discretion of the Village, do not meet the minimum requirements, including without limitation the minimum proposal submission requirements, may not be reviewed. This RFP and the process it describes are proprietary to the Village and are for the sole and exclusive benefit of the Village. Any response, including written documents and verbal communication by any proposer to this RFP, will become the property of the Village and if required by law may be subject to public disclosure by the Village or any authorized agent of the Village. The Village is not liable for any costs associated with the development, preparation, transmittal or presentation of any proposal or material(s) submitted in response to this RFP.
- B. It shall be the proposer's responsibility to review and verify the completeness of its proposal. The Village may request additional or clarifying information or more detailed information from any proposer at any time, including information inadvertently omitted by a proposer. The Village may request to contact clients referenced in the proposal. The Village also reserves the right to conduct investigations with respect to the qualifications of a proposer.
- C. Verbal communication made by any Village employee or agent of the Village with respect to this RFP is not binding and shall not in any way be considered as a commitment by the Village. Only written responses to questions submitted in writing to the Village or written addenda to this RFP issued by the Village will be considered binding on the Village.
- D. The Village reserves and may exercise the following rights and options with respect to evaluation of proposals and selection for negotiation:
 - i. To reject any and all proposals and re-issue the RFP at any time prior to execution of a final contract if, in the Village's sole discretion, it is in the Village's best interest to do so;
 - ii. To supplement, amend, substitute or otherwise modify this RFP at any time prior to selection of one or more respondents for negotiation and to cancel this RFP with or without issuing another RFP;
 - iii. To accept or reject any or all of the items in any proposal and award the contract in whole or in part if it is deemed in the Village's best interest to do so;
 - iv. To reject the proposal that, in the Village's sole judgment, has been delinquent or unfaithful in the performance of any contract with the Village or another government entity, is financially or technically incapable or is otherwise not a responsible proposer;
 - v. To reject as informal or non-responsive any proposal which, in the Village's sole judgment, is incomplete, is not in conformity with applicable law, is conditioned in any way, deviates from this RFP or contains erasures, ambiguities, alterations, or items of work not called for by this RFP;
 - vi. To waive any informality, defect, non-responsiveness and/or deviation from this RFP that is not, in the Village's sole judgment, material to the proposal;
 - vii. To permit or reject, at the Village's sole discretion, amendments (including information inadvertently omitted), modifications, alterations and/or corrections of proposals by some or all of the respondents following proposal submissions;

- viii. To request that some or all of the proposers modify proposals based upon the evaluation of the Village.
- E. The Village may enter into negotiations for a contract, on terms and conditions satisfactory to the Village with one or more selected proposer(s). However, the Village reserves the right to terminate any negotiations at any time or conduct simultaneous, competitive negotiations with multiple proposers. The Village reserves the right to negotiate acceptable terms in an otherwise unacceptable proposal. Such negotiations may result in changes in terms material to this RFP; in such an event, the Village shall not be obligated to inform other proposers of the changes, or permit them to revise their proposals accordingly, unless the Village, in its sole discretion, determines that doing so and permitting such is in the Village's best interest. Should negotiations not prove satisfactory with the selected proposer(s), the Village reserves the right to discontinue negotiations. Additional individuals/businesses may be asked to enter into negotiations, and/or the Village may solicit new proposals.

Appendix A. Community Profile

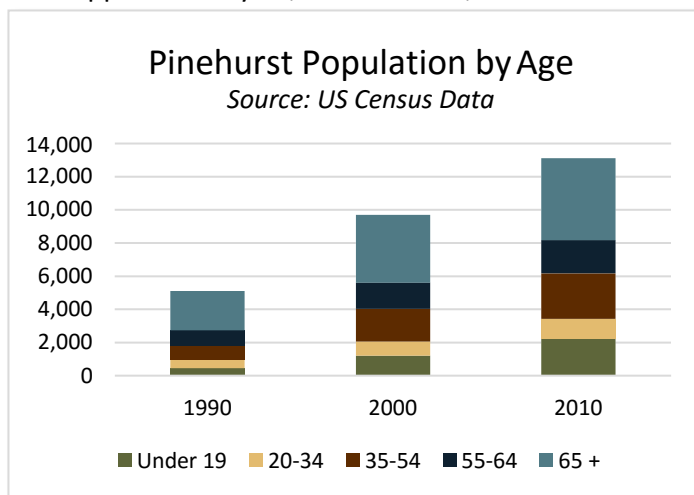
The Village of Pinehurst is located in an area known as the Sandhills in Moore County, North Carolina. Although it was established in 1895, the Village did not become a municipality until 1980. James Walker Tufts, a resident of the Boston area, purchased approximately 6,000 acres of land to create a health resort in the Sandhills. Mr. Tufts contracted with a land planning firm headed by Frederick Law Olmsted, designer of Central Park in New York City and the Biltmore Estate in Asheville to conduct master planning for his desired resort community. In about three weeks' time, the plan for the Village of Pinehurst was formed. In 1996, a large portion of the Village was designated as a National Historic Landmark for its landscape design and significance in the history of golf in the United States.

The Village has an incorporated area of approximately 16.5 square miles and also exercises extraterritorial jurisdiction for zoning purposes over an 8 square mile area immediately outside of its corporate limits. The Village of Pinehurst is surrounded by the incorporated municipalities of Southern Pines, Foxfire, Aberdeen, and Taylortown.

Primarily a residential community, Pinehurst has a \$3.4 billion residential tax base and a \$403 million non-residential tax base, or \$230 million per square mile. Of the total assessed property valuations, 89% are residential, with 11% non-residential. 2017 US Census data indicates the median value of owner-occupied housing is approximately \$290,000 and the median household income is nearly \$82,000.

The 2019 population of the Village of Pinehurst stands at approximately 16,700 residents, which makes Pinehurst the largest incorporated municipality in Moore County. In fact, from 2010 to 2016, Pinehurst was the twelfth fastest growing municipality in the state of North Carolina.

From 1990 to 2010, Pinehurst's population increased from approximately 5,100 residents to over 13,000, or a 155% increase. The average age of Pinehurst residents is higher than many communities, but this is shifting: according to US Census data, 47% of the population was under the age of 55 in 2010, compared to 34% in 1990.



Location is one of the Village's greatest assets.

Pinehurst is only two hours from North Carolina's coast; three hours from the Blue Ridge Mountains; 45 minutes from Fort Bragg, the largest military base in the world (by population); one hour from the state capitol of Raleigh; and two hours from Charlotte with access to international airports, major museums, and other cultural arts venues.

The Village of Pinehurst is an integral part of the economy of Moore County, which is well-diversified with healthcare, recreational, retirement, tourism, retail, agriculture, and manufacturing sectors. Pinehurst's service-based economy attributes over 9,000 jobs to the lodging, medical, and office sectors. Pinehurst and nearby Southern Pines make up the Pinehurst-Southern Pines micropolitan statistical area, which ranked 44th out of 551 in the country for economic strength during 2019.

Two of the largest employers in Moore County are located in Pinehurst and are service-related. FirstHealth of the Carolinas is a private, not-for-profit health care network serving 15 counties in the mid-Carolinas. Pinehurst Resort, owned by Pinehurst, LLC operates nine championship golf courses, including the famous Pinehurst No. 2 course, which was the site of the 1999, 2005, and 2014 U.S. Open Championships. Pinehurst Resort will once again host the U.S. Open Championship in 2024.



The Village of Pinehurst government is comprised of 9 different departments. Primary services include: police, fire, solid waste, street maintenance, recreation, and planning & development services. Schools in NC are operated by a separate county-wide school board authority and there is one elementary school located in the Village limits that will be demolished in 2019, expanded and rebuilt on the same site, and will reopen in 2021.

Appendix B. Current Library Profile

Currently the library located in and serving the Village of Pinehurst is the Given Memorial Library. The Given Memorial Library was established in 1963 with an endowment by Sarah Given Larson, in honor of her parents, John L. and Irene Heinz Given, along with a gift of land on the Village Green by Richard S. Tufts. Since establishment of the endowment, many other private donors have enabled the Given Memorial Library to serve effectively as a “public” library in the Village of Pinehurst since the 1960s. Although the library is approximately 80% funded by private donations, it has continuously operated on a no-fee basis for both residents and non-residents.

Nearby libraries available to residents of the Village of Pinehurst include the Town of Southern Pines municipally funded library, the Katharine L. Boyd Library at Sandhills Community College and the libraries in Carthage and Aberdeen that are part of the Sandhills Regional Library system. Approximately 425 Pinehurst residents currently pay a fee and utilize the Southern Pines Library.

The current collection at the Given Memorial Library consists of approximately 17,000 volumes. Current library services include books, magazines, audio books, digital services, children’s programs, and various educational programs which often double as fundraising events. There are approximately 7,600 card holders and the Library averages 35,900 visits per year. The Given Memorial Library is open Monday – Friday 9:30 am to 5:00 pm and Saturday 9:30 am – 12:30 pm.

The Village of Pinehurst has a rich history which has been documented and archived by the Tufts Archives, founded in 1975. The Given Memorial Library shares the building and facility with the Tufts Archives. These two functions, the Given Memorial Library and the Tufts Archives are operated as a single 501c(3) not-for-profit corporation located in the same 6,390 square foot building on the Village Green at 150 Cherokee Road. The Given Memorial Library occupies 3,300 square feet, or approximately 52% of the existing building.

The Given Tufts organization is negotiating a separation of the archives from the library. If the separation occurs, the archives would be expanded to fill the current shared facility. So, whether or not library growth is found to be needed, it is likely that the Given Memorial Library will need to move to another location.

