



REQUEST FOR PROPOSAL

**Community Wide Survey
The City of Lake Forest**

**Issue Date:
November 14, 2022**

**Bid Due Date:
December 2, 2022**

**The City of Lake Forest
220 E. Deerpath
Lake Forest, Illinois 60045**

THE CITY OF LAKE FOREST

REQUEST FOR PROPOSAL

Community Wide Survey
The City of Lake Forest
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Submittals due **Friday, December 2, 2022, at 11:00am CST**

I. INTRODUCTION

The City of Lake Forest (“City”) is soliciting proposals from qualified firms based on the criteria/requirements outlined in this Request for Proposal (“RFP”). All proposals must be received by Reagan Walsh, Management Analyst, via email at walshr@cityoflakeforest.com by **11:00 A.M. CST on Friday, December 2, 2022.**

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, 2011, and 2016. 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. DESCRIPTION OF THE RFP PROCESS

The RFP shall consist of a two (2) step process.

A. Step 1 – Submission of Proposal

The City will establish an RFP Committee to review and evaluate the written responses to the RFP in accordance with the evaluation criteria identified herein.

B. Step 2 – City Selection and Recommendation Stage

The RFP Committee will recommend a qualified team to provide services to develop and administer a comprehensive community wide survey. City staff will then seek the approval of the recommended team from the Internal Working Group and City Council.

The City reserves the right to interview candidate teams if deemed a necessary step following Step 1.

IV. BACKGROUND

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 2020 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 (2018-2022) focused on Fiscal Stewardship, Business and Economic Vitality, Environmental Sustainability, Recreation, & Leisure, Multi-Modal Transportation and Infrastructure, Community Character, Health, and Safety, and Housing Diversity and Residential Development

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.

V. 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 the 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;
- Help review and revise survey questions and sequencing;
- Create the format and statistically valid 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 Project Subcommittee's goal is to select a recommended Vendor by **December 30th, 2022**, which the vendor will be notified. Final approval of the vendor and project commencement will come from City Council on **January 17th, 2023**. We have targeted survey administration no later than **March 3rd, 2023**, and would like results presented to the City Council on **June 5th, 2023**. Onsite meetings and regular communication with the City will be required throughout the project.

VI. OPTIONAL SERVICES

The Consultant team will strive to find reliable and valid modes of data presentation, from the core questioning to organization-specific questions. The criteria for respondents will be additionally based on the presentation of results, including but not limited to;

- GIS Mapping of survey respondents
- Crosstabs to show results based on demographic groups and other variables
- Alternative presentation materials

VII. PROJECT SCHEDULE MILESTONES

A timeline of the project milestones can be found below:

1. Consultant Notified as Selected RFP Team by City Council – **January 17, 2023**
2. Design Team Notice to Begin Survey issued – **March 3, 2023**
3. Survey Response Deadline – **May 1, 2023**
4. Consultant Releases Survey Announcements to Staff – **June 5th, 2023**

VIII. RFP SUBMISSION

Certain requirements must be met to ensure 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 cover letter expressing interest in providing the outlined services listed in the proposed scope of work. The letter should also summarize key points of the RFP stressing the professional approach to the project and how the team's abilities and experiences fit the position and any unique qualities the firm may have in preparing and conducting community surveys.

B. Staffing Plan

Provide information about the professional team, including:

1. The qualifications for all professional staff members who will help to work to fulfill the needs of this project.
2. A description of any special requirements or innovations needed or suggested for fulfillment of this project.
3. A description of which project of the work will be executed by subcontractors or sub-consultants, and a list of those members that will be connected to this project.

C. 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 similar local projects that have been completed within the past five 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.

D. Project Schedule

Provide a detailed project schedule utilizing the above project schedule milestones as an outline.

E. Cost Proposal

Provide a detailed cost proposal for all services outlined in Section V "Scope of Work". This detailed cost proposal should also clearly outline any subconsultant work.

IX. RFP SUBMITTAL FORMAT

The consultant team shall submit their one, joint, proposal via email to Reagan Walsh, Management Analyst, at walshr@cityoflakeforest.com, **no later than 11:00am CST on Friday, December 2, 2022. The subject line of the email should state *RFP Submittal - Community Wide Survey***. Each proposal 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 RFP submittal. **Individual firms may only participate and submit one RFP submission.**

X. RFP SUBMITTAL REVIEW CRITERIA

Qualified firms interested in providing the services described herein are invited to submit an RFP submission. All respondents will be evaluated by an RFP Committee comprised of City staff in accordance with the evaluation criteria specified below. The Committee’s selection of the qualified team will be subject to the approval of The City of Lake Forest City Council. Submittals will be evaluated on a total score basis, with a maximum score of one hundred (100) points.

GRADING CRITERIA VALUE	VALUE
1. Firm’s qualifications, background, and prior experience in conducting similar surveys.	25
2. Technical approach and understanding of the scope of the project	20
3. Firm’s ability to meet schedules, budgets, & results achieved with similar projects	20
4. Overall project design, methodology, and presentation	15
5. Professional qualifications of key personnel, references	10
6. Incorporation of Optional Services	10
Total Points	100

XI. RFP PROCESS TIMELINE (TENTATIVE AND SUBJECT TO CHANGE)

DATE	ACTIVITY
<u>November 14, 2022</u>	Request for Proposal publicly posted
<u>November 21, 2022</u> <u>4:00pm CST</u>	Deadline for questions from respondents
<u>November 22, 2021</u> <u>4:00pm CST</u>	Responses to questions will be issued to respondents
<u>December 2, 2022</u> <u>11:00am CST</u>	<i>Deadline for RFP Submission</i> The design team shall submit their one, joint, proposal via email to Reagan Walsh, Management Analyst, at walshr@cityoflakeforest.com , no later than 11:00am CST on Friday, December 2, 2022 . The subject line of the email should state <i>RFP Submittal - Community Wide Survey.</i>
<u>Dec. 5 – Dec. 30, 2022</u>	Interviews with candidate teams (if deemed necessary by the City) & selection of recommended team by RFP Committee. Selected respondent will be notified no later than 4:30pm on December 30, 2022.
<u>January 17, 2023</u>	Seek City Council approval of recommended team on the City Council Meeting conducted on January 17, 2023 at City Hall.

XII. QUESTIONS

Questions concerning the RFP and elements discussed herein, may be directed to Reagan Walsh, Management Analyst, at walshr@cityoflakeforest.com.

XI. Terms and Conditions

This RFP is issued pursuant to applicable provisions of the City's Purchasing Policies and Procedures. The City will not be liable in any way for any costs incurred by respondents in replying to this RFP. The City of Lake Forest reserves the right to reject any and all proposals, to waive any informality, to request interviews of consultant(s) prior to award and to select and negotiate the contract services in the best interest of the City.