



REQUEST FOR PROPOSAL

Strategic Planning Services

**Issue Date:
July 27, 2023**

**Bid Due Date:
August 18, 2023
4:30pm CST**

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



Proposal Submission Summary

Proposal Due Date: 08/18/2023 at 4:30 PM Central

Submit: One (1), signed, proposal, including the Project Pricing and Reference forms.

Send to: Email George Issakoo, Issakoog@cityoflakeforest.com
Subject Line: *Strategic Planning Services Proposal: "Firm Name"*

OR

Sealed Proposal: Strategic Planning Services Proposal
George Issakoo, Assistant City Manager
220 E. Deerpath
Lake Forest, IL 60045

Effective immediately upon release of this Request for Proposals ("RFP") and until notice of contract award, all communications from prospective Vendors regarding this RFP shall be directed to:

George Issakoo, Assistant City Manager
Issakoog@cityoflakeforest.com

Listed below are specific and anticipated dates and times of actions related to this RFP. The actions with specific dates must be completed as indicated unless otherwise changed.

<i>Milestone</i>	<i>Anticipated Timeframe</i>
RFP Issuance	7/27/23
Proposals Due from Vendor	08/18/2023 by 4:30 PM Central
Evaluation of Proposals / Finalist Interviews	08/18/23 – 08/31/23
Vendor Notified for Recommendation	09/1/23
Contract Award Date (City Council Approval)	09/18/23



Table of Contents

- A. Introduction and Overview
- B. RFP Process and Grading Criteria
- C. Scope of Services
- D. City Overview
- E. Strategic Planning History
- F. Terms and Conditions
- G. Key Materials
- H. Required Forms
 - 1. Project Pricing
 - 2. References

Section A: Introduction & Overview

The City of Lake Forest (“City”), Lake County, Illinois, is seeking the services of a professional firm for the facilitation and development of a **5-year Strategic Plan for the City of Lake Forest**. Firms applying must submit a signed proposal following the instructions and format of the Request for Proposals (RFP) with the required project pricing and reference form attached.

All proposals must be received by George Issakoo, Assistant City Manager, via email at Issakoog@cityoflakeforest.com by **4:30 P.M. CST on Friday, August 18, 2023**. Email subject line should be labeled *Strategic Planning Process Proposal: “Firm Name”*. Proposals may also be sealed and mailed to Lake Forest City Hall, at 220 E Deerpath, Lake Forest, IL, 60045.

Section B: RFP Process and Grading Criteria

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

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. Virtual finalist interviews will then be conducted for those vendors with the highest scoring per the grading criteria.

Step 2 – City Selection and Recommendation Stage

The RFP Committee will recommend a qualified team after finalist interviews are conducted. City staff will then seek the approval of the recommended team from City Council.

Responses to this RFP will be evaluated by a Selection Team consisting of City department stakeholders.

<i>Evaluation Criteria</i>	<i>Value</i>
Pricing – The firm’s proposed fees for the services requested.	30
Quality of Work and Services Offered – The firm’s operational capacity and level of quality they can provide to perform services requested.	30
Qualifications and Experience – The firm’s experience and capacity for providing services	25
References – The firm’s past experiences providing similar services to other municipalities, districts, or other agencies.	15
Total Points	100

Section C: Scope of Services

The City of Lake Forest is seeking the services of a professional firm for the facilitation and development of a **5-year Strategic Plan for the City of Lake Forest**. A strategic plan is a vital tool for local jurisdictions to ensure that the vision and priorities set by the City Council are clearly conveyed to employees and the community, and that City strategies and projects are developed to meet Council priorities, and that overall city government is accountable to meeting community needs.

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 propose a framework or model(s) that they believe to be most suitable for the City of Lake Forest at this time.

That being said, the City is seeking proposals that must encompass, at a minimum, the following elements;

- 1. Background Review and Environmental Scan**
 - a. Inclusion of data/analysis collected from the 2023 Community Wide Survey
 - b. Inclusion of ideas or reference to objectives in the Looking Forward Lake Forest Central Business District Plan Chapter Update.
- 2. Community Engagement**
- 3. Identifying and Building-Out Strategic Priority Areas Based on Information Gathered**
- 4. Development of a Strategic Plan**
 - a. The document will provide a background and summary of the planning process, detailed overview of the data collected and in-depth analysis and justification for the designated priority areas.
- 5. Presentation and Approval**
 - a. Availability to present in-person to City Council

Section D: City 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 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.

Section E: Strategic Planning History

The City last completed a five-year strategic planning process in 2018 and developed the priority areas of:

- Fiscal Stewardship,
- Community Character/Safety and Livability,
- Environmental Sustainability/Recreation and Leisure,
- Housing Diversity and Residential Development,
- Multi-Modal Transportation and Infrastructure, and
- Business and Economic Vitality

The plan would have been updated in 2022, but due to the uncertainty of the post pandemic recovery and impending turnover at the City Council, the City determined it would be most prudent to wait until

the Fall of 2023. In May, there was a “Changing of the Guard”, where three new City Council members and a new Mayor joined the City Council.

Additionally, the City has begun the process of conducting a community wide survey to get valuable feedback from the community on service satisfaction and community priority areas. With a new City Council and data from the community survey available in the coming months, the City is poised to undertake a new Strategic Planning process, soliciting feedback from community stakeholders, to develop a plan for the next five years.

Section F: 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.

Section G: Key Materials

1. [FY2018-2022 City of Lake Forest Strategic Plan](#)
2. [2021 Annual Strategic Plan Report Update](#)
3. [Draft Chapter of the Looking Forward Lake Forest Central Business District Plan](#)
4. [Website page for the 2023 Community-Wide Survey](#) (Results Report Coming Soon)

Section H: Required Forms

1. Project Pricing (Attached Below)
2. References (Attached Below)

THIS SHEET IS REQUIRED FOR QUOTATION

1: Project Pricing Form

Please provide a quote based on proposal for conducting a strategic plan for the City of Lake Forest, inclusive of all items indicated in the scope of work and additional “optional” items as your firm sees fit. Please attach the quote to the proposal or insert in the blank space below.

THIS SHEET IS REQUIRED FOR QUOTATION

2. References Form

Please list below a minimum of three (3) references for which your firm has performed work similar to that required by this RFP.

Community/Organization:

Contact (Name, Email/Phone):

Dates of Service:

Link to Plan (or attach):

Community/Organization:

Contact (Name, Email/Phone):

Dates of Service:

Link to Plan (or attach):

Community/Organization:

Contact (Name, Email/Phone):

Dates of Service:

Link to Plan (or attach):