

CITY OF EVANSTON

INTERDEPARTMENTAL MEMORANDUM

May 2, 2005

TO: Julia Carroll, City Manager

FROM: Vincent Jones, Assistant to the City Manager

**SUBJECT: Strategic Planning Services – RFP #06-14
City Manager’s Office
Recommendation of Award**

Staff recommends the award of a contract for strategic planning services to Executive Partners, Inc. for an amount not-to-exceed \$55,000.00.

BACKGROUND

In accordance with good management practices the City needs to create a comprehensive strategic plan for the City of Evanston. The City Council authorized the City Manger to proceed with a solicitation of proposals on March 14, 2005. The Plan will reflect the direction goals of the City Council. It is expected that the creation and adoption of a strategic plan will lead to more effective City operations. A true benefit for Evanston is that it will help us move beyond managing independent issues and require management of issues in the context of a clearly articulated community vision. Instead of developing a list of unrelated goals, in the future annual goals will be reflective of the direction outlined in the strategic plan, with consideration of the City’s financial position.

PROCESS

Staff worked to develop a detailed Request for Proposal outlining the services required. Seven specific tasks were identified:

- Task 1 – Facilitate sessions framing issues and opportunities for the City
- Task 2 – Data development and benchmarking
- Task 3 – Facilitate sessions developing broad direction with Council
- Task 4 – Facilitate sessions developing specific direction with Council and senior staff
- Task 5 – Facilitate staff Action Planning for the next 18 months
- Task 6 – Final Review and publishing of Strategic Plan and Annual Strategic goals document
- Task 7 – Optional – Facilitate citizen “Town Hall” meeting to allow citizen input into the strategic planning process

The evaluation criteria identified in the proposal was as follows:

- Experience of the firm and assigned personnel (10%)
- Ability to provided services, prior municipal experience and references (30%)
- Approach & work plan (25%)
- Cost (10%)
- Demonstration of knowledge of quality improvement tools and values (20%)
- MBE/EBE Participation (5%)

The evaluation team consisted of the following individuals:

- Julia Carroll – City Manager
- Judy Aiello – Assistant City Manager
- Gavin Morgan - Assistant to the City Manager
- Vincent Jones – Assistant to the City Manager
- Doug Gaynor – Director, Parks/Forestry and Recreation
- David Jennings – Director, Public Works
- Bill Stafford – Director, Finance
- Bobbie Tolston-Brown – Director, Purchasing and Contracts

Five proposals were submitted in response to the RFP. We received proposals from the following firms: Executive Partners, Inc. (IL), Innovations Group/Innes Strategy (MO), LBL Strategies (IL), Management Partners, Inc. (OH), and World Source One, Inc. (NV). Proposals ranged in cost from to \$53,000 to \$161,000. The evaluation team reviewed each proposal and selected two firms to interview based on their responses to the RFP. Three firms were not selected because they did not have adequate local government experience. Interviews were conducted with Executive Partners, Inc. and Management Partners, Inc. The firms answered additional questions that helped the review team further evaluate the proposals. Based on this additional information, the firms were rated on the selection criteria. The table below depicts the final rating for the two firms interviewed.

CATEGORY	Executive Partners, Inc.	Management Partners, Inc.
Ability and Professional Qualifications (10%)	9.30	9.50
Specialized Experience of Firm and References (30%)	24.40	26.30
Approach and Work Plan (25%)	23.10	19.80
Cost (10%)	10.00	4.60
Understanding of Quality Improvement tools (20%)	16.90	18.50
MWEBE (5%)	0.00	0.6
Total Points	83.70	79.30
Cost	\$53,835.00	\$108,980.00

The scoring indicates the strong capabilities of both respondents. However, knowledge of the Evanston community favored Executive Partners, Inc. and although well qualified the cost of Midwest Partners proposal and their location out of state were factors in the team's final recommendation.

RECOMMENDATION

Staff recommends award of the contract for RFP-06-14 - Strategic Planning Services to Executive Partners, Inc. in an amount not-to-exceed \$55,000.00.