Invitation to Bid
District-Wide Phone Survey 2017

Overview
Sno-Isle Libraries is seeking the professional services of a market research firm to conduct a telephone survey with residents within the Sno-Isle Libraries service area.

Bids are due September 1, 2017.

Survey centers on Sno-Isle Libraries’ website, social media, and public events.

The firm chosen will work directly with the Sno-Isle Libraries Communications Director, who will act as project manager and liaison with Sno-Isle Libraries managers and directors.

Background
Sno-Isle Libraries is a two-county public library district serving more than 740,000 people in Snohomish and Island counties through 22 community libraries, mobile and online library services. The organization is headquartered at its distribution facility in Marysville, Washington.

Research Objectives
The Library would like to better understand resident attitudes and gain insights into:

- Awareness of Library materials and services
- Perceptions of highest and lowest value Library materials and services
- Attitudes around Sno-Isle Library as a steward of public funds
- Attitudes towards library value statements
- Attitudes to help determine whether the Library should raise the library operating levy to continue and sustain library services or consider cuts to the library’s budget and reduction in services to the public

The information gathered in this research will be used for planning around a potential library operations levy lift ballot measure in 2018.

In order to address these objectives, the selected Vendor will be asked to conduct a scientifically valid telephone survey with a +/- 5% confidence factor, with residents of the targeted area during the month of September 2017 and deliver topline results and an executive summary in October 2017. The sample will include cellular phone numbers to enable a representative proportion to the geographic and age demographic segments of the sample, as far as is financially feasible and reasonable for this project.
Respondent Qualifications and Sample Delivery

Respondent Qualifications

Respondents will be qualified based on the following criteria:

- Must be a resident living within the defined boundaries (Snohomish and Island Counties, with the exception of the Cities of Everett, Woodway, and Bothell)
- Proportional representation across ages 18-85
- Gender mix should fall between 50/50 and 60/40, in either direction
- Respondents may be a regular public library user or a non-library user.

Sample

Vendor will procure a contact list from a reputable list agency. Survey respondents will be asked to identify if they or someone in their household has used the library within the last 6 months.

Survey Development

Vendor will be provided an opportunity to review and provide final input on a survey instrument which shall include a draft list of questions. The pre-developed survey questionnaire shall be provided by Sno-Isle Libraries.

The input sought from the Vendor shall ensure the final survey instrument can be quickly completed by participants, minimizes possibility of bias and is organized to maximize the quality of responses.

Results, Analysis and Report

Vendor will analyze and provide an initial topline results summary, a 2-5 page executive summary of results, and a full report of approximately 10-20 pages. The full report should include an overview summary, major findings, strategic cross-tabulations, recommended actions, and an explanation of methodology as an appendix.

Vendor will deliver the raw data results to the Library in a manipulable format, such as Microsoft Excel within 30 days of the close of the project.

Sno-Isle Libraries Project Management

Vendor will report to the Communications Director as Sno-Isle Libraries’ project manager for this project.
Timeline
21 August 2017 ITB issued
23 August 2017 Questions due by 3pm (PDT)
25 August 2017 Addenda issued (if necessary)
1 September 2017 Bids due
5 September 2017 Contract awarded
29 September 2017 Phone survey completed
6 October 2017 topline results delivered
16 October 2017 executive summary

Questions Regarding Bids
Submitting Questions
Questions surrounding this ITB should be submitted via email to Karen Kramer (kkramer@sno-isle.org) by 3pm, August 23. Karen Kramer is the sole point of contact at Sno-Isle Libraries for questions regarding this solicitation. Questions via telephone will not be accepted. Responses will be provided via email and on our website at: http://www.sno-isle.org/project-bids/ by noon, August 25.

Bid
Bid Contents
Sno-Isle Libraries is looking for succinct answers with relevant information. Please limit your Bid to no more than a dozen pages. There will also be one “Certifications and Assurances” page you will include as part of your Bid.

Cover Letter
Please include the following: (1) a letter of interest signed by the firm principal with a statement of availability to complete the work; (2) the identification of the proposer, including name, address, email address and telephone number; (3) the name, title, address, email and telephone number of contact person during period of Bid evaluation; and (4) the signature of a person authorized to bind proposer to the terms of this Bid.

General Company Profile and Experience
Briefly provide general information about the firm’s experience, capabilities, and length of time the firm has been in the business of performing work of a similar nature.

Professional Credentials of Key Staff
Please identify and list the functions of the key staff who will work on this project with a brief summary of the professional credentials and experience of project staff. Do not include lengthy resumes or vitae.
**Project Approach**

Describe how you will approach and meet the objectives listed above if you are selected for this project. Provide links (preferred) or examples of similar research efforts performed.

**Budget/Cost Scenarios**

Provide a not-to-exceed budget amount with high-level detail showing projected costs. Proposers may submit as many costs scenarios as desired. For each costs scenario, include related assumptions and explanatory comments. Summarize the costs and attach all detail necessary to support the summarized costs. *Note: cost Bids must be all-inclusive and must include the hourly/daily rate, estimate number of hours/days to complete the project and a detailed estimate of all other costs, such as travel. No other monies will be paid for items omitted by the proposer, unless requested and approved in advance in writing.*

**References**

Provide contact information for three references who can describe work you have done which is similar or related to the report we are seeking.

**Signed Certifications and Assurances**

Sign and submit the attached Certifications and Assurances as part of your Bid.

**Submitting a Bid**

Bids may be submitted via email, mail, courier, DropBox, or in-person. Bids should be in writing and include links or attachments to materials which support, validate or demonstrate the qualifications of the submitter. The format may be a Word or pdf document.

The deadline for submission/receipt is September 1, 2017 by 2 p.m. PDT.

**Submit Bid to:**

Karen Kramer, Purchasing Specialist  
kramer@sno-isle.org  
Sno-Isle Libraries  
7312 35th Avenue NE  
Marysville, WA 98271

Please contact Karen Kramer at 360-651-7012 to assure the Bid has been received.

Sno-Isle Libraries shall not be responsible for any costs incurred by the firm in preparing, submitting or presenting its response to the ITB.

All Bids received after the designated time stated will not be considered.

**Revision/Rejection of Bids**

Sno-Isle Libraries reserves the right to “revise” or “amend” the ITB prior to the Bid due date by “written addenda.”
Proprietary Information/Public Disclosure
All Bids received shall become the property of Sno-Isle Libraries and remain confidential until a contract, if any, resulting from this request is signed by the Communications Director. After a contract is signed, all Bids received shall be deemed public records as defined in Chapter 42.56 of the Revised Code of Washington (RCW). Any information contained in the Bid that is proprietary must be clearly marked or designated as “confidential” in order to be excluded from public records request responses. Only information designated under current state law statutes as appropriate for exclusion from public records exposure may be marked and treated as confidential.

Sno-Isle Libraries reserves the right to request clarification of information submitted, and to request additional information from any proposer. Sno-Isle Libraries reserves the right to reject any Bid for any reason including, but not limited to the following: (1) any Bid which is incomplete, obscure, irregular, or lacking necessary detail and specificity; (2) any Bid which has any qualification, addition, limitation, or provision attached; (3) any proposer who (in the sole judgement of Sno-Isle Libraries) lacks the qualifications or responsibility necessary to perform the work; (4) any Bid for which a proposer fails or neglects to complete and submit any qualifications information, and (5) any Bid which is received after the deadline date and time.

Evaluation Process
Via email, Sno-Isle staff will confirm receipt of all Bids received by the due date, and will later inform submitters of the status of their Bids.

Bids will be evaluated based on the following criteria:

Possible Points:
Budget/Costs Scenario(s)........................................................................................................ 55 points
Firm Profile and Staff Experience (including references)............... 20 points
Project Approach.................................................................................................................. 20 points
Adherence to Submittal Directions................................................................. 5 points

Sno-Isle Libraries expects to make a decision and discuss the final contract with the selected firm by September 5, 2017. The Library may elect to award the contract based only upon bids received. If deemed necessary, pre-selection interviews may be conducted with invited bidders, in-person, via Skype or by telephone.

Terms and Conditions
The successful proposer will be required to sign a Contract with Sno-Isle Libraries. Sno-Isle Libraries will not sign any company’s services agreement, contract or any other form of agreement. Sno-Isle Libraries reserves the right to extract certain language from a company’s agreement and incorporate it into a Library contract if mutually agreeable to both parties.
Sno-Isle Libraries will retain all rights to the finished including project files. After final cut is delivered, the producer will transfer all usable files to an external hard drive provided by Sno-Isle Libraries.

The proposer, by submitting a response to this ITB, waives all right to protest or seek any legal remedies whatsoever regarding any aspect of this ITB.

Sno-Isle Libraries reserves the right to negotiate with the selected proposer the exact terms and conditions of the contract agreement.

Sno-Isle Libraries is under no obligation to award this project to the proposer offering the overall lowest fee or contract terms. Evaluation criteria, included in this document, shall be used in evaluating Bids.

Thank you for considering this ITB and for the efforts you may undertake to submit a Bid.
CERTIFICATIONS AND ASSURANCES

I/we make the following certifications and assurances as a required element of the proposal to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract:

1) I/we declare that all answers and statements made in the proposal are true and correct.

2) The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single proposal.

3) The attached proposal is a firm offer for a period of 60 days following receipt, and it may be accepted by Sno-Isle Libraries without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 60-day period.

4) In preparing this proposal, I/we have not been assisted by any current or former employee of Sno-Isle Libraries whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity. If there are exceptions to these assurances, I/we have described them in full detail on a separate page attached to this document.

5) I/we understand that Sno-Isle Libraries will not reimburse me/us for any costs incurred in the preparation of this proposal. All proposals become the property of Sno-Isle Libraries, and I/we claim no proprietary right to the ideas, writings, items, or samples, unless so stated in this proposal.

6) Unless otherwise required by law, the prices and/or cost data which have been submitted have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by him/her prior to opening, directly or indirectly, to any other Proposer or to any competitor.

7) I/we agree that submission of the attached proposal constitutes acceptance of the solicitation contents and general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.

8) No attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.

9) I/we grant Sno-Isle Libraries the right to contact references and other, who may have pertinent information regarding the ability of the Contractor and the lead staff person to perform the services contemplated by this Request.

On behalf of the Contractor submitting this proposal, my name below attests to the accuracy of the above statement.

_______________________________________________
Signature of Proposer / Date

8/16/2017