

Request for Qualifications
for
Williamson County, Texas
Strategic Plan Consulting Services

Purpose: Williamson County, Texas, herein “the County,” has initiated a Request for Qualification (RFQ) process to identify and execute a strategic visioning and planning process. The County seeks a vendor who has demonstrated experience in successfully developing strategic plans, has strong facilitation skills and experience with public agencies.

Williamson County’s government is a large, complex organization with many moving parts. The County is governed by the county Judge, four commissioners and twenty-four (24) additional elected officials that steer the organization through the budgeting process, setting policy and demonstrating leadership in a number of other ways. The Williamson County Strategic Plan, herein “The Plan” is one such example of this proactive leadership. Additionally, thirty-five (35) departments and over 1,800 employees operate to support service delivery throughout the County.

At this time, Williamson County seeks to update its existing Strategic Plan, established in 2010, by hiring a consulting professional to assist with that process and final document. The updated plan will define the mission and vision of the organization and the values it will hold as it moves forward.

The Plan is intended to provide a clear process for achieving the goals of the County. It is to serve as a guidepost for budgeting and major decisions. It is considered a living document and should continue as a tool to assist departments in providing the best services and facilities to residents.

Background: Williamson County is one of the fastest growing counties in the country with a population now exceeding 617,000 residents according to the US Census Bureau. Located in the Central Texas Hill Country just north of the state capitol in Austin, and the University of Texas, Williamson County has emerged as an exceptional place to live. Physically, the eastern part of the county is level black land soil and the western part rolling limestone hills, cut through by the San Gabriel River and tributaries. The County has a storied history including dinosaurs, Comanches, outlaws, Texas Rangers, the Chisholm Trail, cowboys, and sturdy pioneers. Old ranch lands have become new neighborhoods, and today, the County is central to agriculture, education, and high-tech industry.

Williamson County is blessed with a mild climate offering more than 300 sunny days each year, affordable living, quality schools, clean air, scenic open spaces, and an abundance of parks and recreational opportunities. The County is well known for lively holiday traditions, live music and neighborly people with friendly dispositions that can only be described as “deep in the heart.” The County boasts a low crime rate and unlike most states, Texas has no state personal income tax. All of these reasons make Williamson County one of the most desirable places to live and work in the United States.

The County was organized in 1848 and named for Robert M. Williamson, pioneer leader and veteran of the Battle of San Jacinto. Williamson County encompasses 1,124 sq. miles of Texas Hill Country and 12 sq. miles of water.

Respondent Requirements: Respondents shall be firms, corporations, individuals or partnerships normally engaged in the consulting process and preparation of strategic plans of large, complex organizations.

Respondents shall have experience creating and updating strategic plans in high growth Texas regions.

Respondent shall demonstrate in their response their knowledge and understating of the issues facing Williamson County and how those issues are relevant to updating The Plan.

Respondents shall include at least one Project Manager with a minimum of five (5) year's experience in providing specified services.

Project Manager shall have completed no less than five (5) similar projects within the past three (3) year's.

Project Manager and all project team members may not be substituted or changed throughout the term of the agreement without the written approval of the City for the requested change.

Supporting Documents:

- Attachment A: Snapshot of Williamson County
- Attachment B: Williamson County Organizational Chart
- Attachment C: Location Map
- Attachment D: Williamson County Strategic Plan 2010
- Attachment E: Subsequent Departmental Strategic Updates

Scope of Work: Williamson County requests the submission of qualifications from qualified individuals or firms to assist in updating and developing The Plan that will serve to methodically guide departments and elected officials through the organization's next phase of growth.

The intent of this project is to complete a major **ten (10) year** update to The Plan. The successful respondent shall engage with project stakeholders to include members of the Court, department heads, Elected Officials, residents, the business community and other key groups to create The Plan.

Services shall include but are not limited to stakeholder engagement, research and consultation on best practices, meeting facilitation, document drafting, creation of supporting graphics, statistical analysis, and progress updates. The successful respondent shall present a completed strategic plan update to the Williamson County Court for adoption.

Existing Plans: A number of departments and elected officials engage in strategic planning exercises on a routine basis. These documents have been included in this RFQ to provide

insight to the work that does not have to be created. These efforts can be expanded on and incorporated into this planning exercise.

Planning Vision: The Plan is intended to provide a clear process for achieving the goals of the County. The Plan shall, at a minimum, represent the County's profile, values, current and future opportunities, needs, market position, competitiveness and service delivery goals.

Site Visits: Successful respondent shall visit Williamson County to familiarize themselves with the area and the challenges presented.

Meetings: Successful respondent shall schedule, promote and host stakeholder meetings to garner perspective and obtain input into Williamson County's unique position.

Decision making: The final scope of work will be developed in collaboration with the members of the Court and the successful respondent. The Court will render all final decisions as to the preparation and adoption of the Plan.

Data collection: The successful respondent shall utilize stakeholder input and interviews, current economic information and local, regional and national data in order to assist with and facilitate a Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis.

Stakeholder engagement: The successful respondent shall foster effective, far reaching and authentic participation by key stakeholders. Techniques should include, at a minimum, stakeholder meetings, stakeholder interviews, surveys and use of electronic media. The stakeholder engagement strategy should promote sincere participation. The strategy should identify the purpose of each identified stakeholder group, and the methods to be used for communication.

Final product: The final work product shall include all elements outlined in the contracted scope of services and related implementation recommendations. The content shall be concise, goal driven and structured within a timeline.

All elected officials shall have the option to participate.

All departments shall be represented in the plan.

The successful respondent shall present the final product and recommendations to the Commissioners Court for input, edit, revision and adoption.

Benchmarking: Implementation strategies and benchmarking shall be outlined in The Plan. The Plan shall be a working tool and provide measurable, performance-based goals that can be implemented and evaluated at predetermined frequencies.

Deliverables: The successful respondent shall provide the County with the following deliverables:

- Community engagement and facilitation aids
- Facilitation aids shall foster public outreach and citizen participation and shall include but not be limited to meetings, mailings, surveys, websites, and social media
- Meeting presentations and graphics

- Meeting summaries
- Plan elements
- Professionally written and edited text
- Final updated Strategic Plan Document
- Fifty (50) bound hard copy submissions in a format acceptable to the County
- One (1) Electronic submission

The Plan shall be prepared in a format and language that is user friendly and easily comprehensible and accessible to the public. All electronic files in native software formats editable by the County.

All documents and work products created as a result of this process shall become the property of Williamson County to include studies, documents and data.

Committee Review: An evaluation committee will review each response for solicitation compliance and technical scoring in each category using the following weighted criteria. A consensus score will be assigned to each response.

Project team qualifications	40 Points
Demonstrated understanding of Williamson County	10 Points
Proposed approach and methodology	20 Points
Timeline	10 Points
Work samples	20 Points
References	Acceptable/Unacceptable

The evaluation process may reveal additional information for consideration. The County reserves the right to modify, without notice, the evaluation structure and weighted criteria to accommodate these additional considerations to serve the best interest of the County.

Evaluation Committee:

Judge Bill Gravell
 Terry Cook, County Commissioner Precinct One
 Cynthia Long, County Commissioner Precinct Two
 Valerie Covey, County Commissioner Precinct Three
 Russ Boles, County Commissioner Precinct Four

Solicitation and Award Schedule: It is the County's intention to comply with the following solicitation timeline.

Respondents may be required to make an oral presentation to the selection team to further present their qualifications. These presentations will provide the respondent the opportunity to ensure a mutual understanding of the services to be provided and the approach to be used.

Solicitation released	week of July 19, 2021
Deadline for questions	August 5, 2021
County responses to all questions or addendums	August 12, 2021
Responses for solicitation due at or before 3:00 PM	August 26, 2021
Oral presentations	TBD
Contract award target	September 30, 2021

Project Schedule: The County seeks completion of The Plan with a presentation to the Court no later than May 2022. County staff has created the following schedule as a guideline to communicate the anticipated activities necessary to complete The Plan on time but seeks the respondent's scheduling recommendations in the RFQ response.

Consultant Selection	September 2021
Project Kick-Off	October 2021
Data Collection	November 2021
Stakeholder Outreach and Input Sessions	December 2021 – February 2022
Document Drafting	March 2022
Public Hearings	April 2022
Project Close and Presentation	May 2022

Response Requirements: The Response and accompanying documentation are the property of the County and will not be returned.

To achieve a uniform review process and obtain the maximum degree of comparability, the responses shall be organized in the manner specified below. Responses shall not exceed twenty-five (25) pages in length (excluding title pages(s) and index/table of contents, or supplemental attachments or dividers). Information in excess of those pages allowed may not be evaluated.

Title Page (1 page) – Show the solicitation title and number, the name of firm, address, telephone number(s) name of contact person and date.

Letter of Transmittal (1 page) – Identify the services for which the solicitation has been prepared.

Briefly state your firms understanding of the services to be performed and make a positive commitment to provide the services as specified.

Provide the name(s) of the person(s) authorized to make representations for your firm, their title(s), address, telephone number(s) and e-mail address.

The letter of transmittal shall be signed by a corporate officer or other individual who has the authority to bind the firm. The name and title of the individuals(s) signing the solicitation shall be clearly shown immediately below the signature.

Table of Contents (1 page) – Clearly identify the materials by Tab and Page Number.

Available Resources and Consultant Location – Respondent shall provide information on size, resources and business history of the firm in addition to the firm's unique experience and qualifications for updating The Plan.

Project Team Experience and Qualifications – Respondent shall present qualifications for the proposed project team. Qualifications shall include resumes and specific examples of similar projects completed in the past three (3) years by the members proposed to be on the project team.

The Project Manager shall be identified as well as the role of each individual team member. An organizational chart of the proposed project team shall be included.

Respondent shall identify any sub-contractors along with their expected services to the County for the scope of work on behalf of the firm. Qualifications of any sub-contractors shall be included and shall be shown in the organizational chart required in section 1.5.1 above.

Respondent shall provide list of all of the firm's strategic plans adopted in the past five (5) years.

References – Provide the name, address, telephone number and e-mail address of a primary contact for at least three (3) organizations that have utilized similar services from your organization, including the proposed Project Manager, within the last three (3) years. Include a brief overview of the work performed with, at a minimum, a short description of the services provided, including total fee and methodology used for the projects. References may be checked prior to award. Any negative feedback received may result in disqualification response.

Demonstrated Understanding of Williamson County – Respondent shall demonstrate their understanding of the unique issues facing Williamson County and how those issue may impact The Plan.

Methodology and Approach –Respondent shall describe the method and approach to be used in updating The Plan. It is expected that the respondent's proposal shall provide specific recommendations for approaches, tasks and deliverables based on their experience in this field Specifically describe the following:

- Community engagement and notification strategies, tools and techniques
- Meeting facilitation tools and techniques
- The process for drafting and revising the individual plan elements
- Any unique techniques that that have been successfully utilized on similar projects

Timeline – Respondent shall provide a proposed schedule for the complete project per the specifications contained herein.

Work Samples – Respondent shall include a minimum of three (3) completed and adopted strategic plans completed for other similar organizations by the proposed Project Manager.

Industry Awards – Respondent shall provide information on professional awards or recognition received for previously completed strategic plans by the proposed Project Manager.

Supplemental Materials – Supplemental materials may include sample strategic plans or other relevant work products.

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