

RFP for California State Library LSTA Five-Year Plan Development

Questions and Answer

1. May a sole consultant purchase limited specialist services, such as an independent library-sector review or document-accessibility review, without treating those providers as proposed project personnel or subcontractors? Are there disclosure or approval requirements?

We would expect that the proposal would note how the planning process would be implemented and by whom. Please see “Instructions to Submit a Proposal”, specifically, “Personnel: A list of key personnel and their qualifications, and a resume for each person who will be working on this assignment. outlined in the RFP proposal.”

2. Will the State Library handle survey distribution, participant recruitment and scheduling, or is the consultant expected to coordinate those activities? Is there an anticipated survey response volume?

Consultants should coordinate the activities. The State Library can participate in nominating participants and in survey distribution. There are approximately 16,000 public library employees in California. We would not anticipate more than 1,000 responses.

3. Does the State Library expect to provide the required federal certification and assurance information, with the consultant responsible for incorporating it into the final plan?

The State Library completes IMLS certifications and assurances independently.

4. The current 2023–2027 evaluation is scheduled for completion on January 21, 2027, while project work begins January 4. What interim evaluation materials will be available at kickoff, and should bidders include a specific integration/rework allowance after the final evaluation is delivered?

The evaluation is currently in progress. Any summary information that has been completed by the evaluators by January will be made available to the planner. The planner should anticipate including information from the final evaluation in the planning process.

5. What grant-level data, prior applications/reports, outcome measures and partner/audience datasets will PLP/California State Library provide, in what formats, and what depth of quantitative analysis of historical grantmaking is expected?

The planner will have access to the State Program Report data covering the first three years of the current Five-Year Plan. The planner is expected to conduct sufficient analysis of this data to fulfill the requirements as stipulated in the RFP.

6. For pricing, are 4–8 targeted focus groups and up to 12 individual interviews intended as a required baseline, maximum authorized quantities, or optional units? Should the proposal show a base quantity plus a per-session unit price up to each maximum?

The proposal should comprise a plan to conduct between four and eight targeted focus groups and up to 12 individual interviews. Per the Instructions to Submit a Proposal,

“Work Plan: A detailed outline of the project management strategy for this project that includes a timeline for activities, number of focus groups and/or meetings, person(s) responsible for activities, deliverable dates, and specific cost information tied back to activities. Please include an itemized quote for all costs, including labor, office expenses, communications, and all other expenses.”

When responding to the RFP, the Consultant may choose to quantify the cost per unit.

7. For the online survey, which party will own instrument design, distribution, respondent communications, accessibility, translation, data cleaning and analysis? Are languages other than English expected, and if so which languages and estimated respondent groups?

For the online survey, the planner will design the survey instrument, ensure accessibility, and conduct any data cleaning and analysis. The State Library can provide input on and assist with the instrument design and distribution of the survey. It is anticipated that the survey will be conducted in English. All survey data should be given to the State Library.

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public library and State governmental purposes: The copyright in any work developed under this grant or contract under this award; and

Any rights of copyright to which a Subrecipient or a contractor purchases ownership with award support.

8. Which version of the IMLS Five-Year Plan Guidelines, six Measuring Success focal areas and fourteen intents should govern the proposal and initial work? If final 2028–2032 guidance changes after award, will resulting scope changes be handled through an agreed change-control process?

The plan will need to align with IMLS' [2028-2023 Five-Year Plan Guidelines](#). Any changes to the plan following its submission will be managed between the State Library and IMLS.

9. The RFP requires California Accessibility Standards and WCAG 2.0 “or a subsequent version” at minimum AA. Which WCAG version should bidders price against, and what accessibility testing/remediation evidence is required for the Word, PDF and one-page visual deliverables?

The latest version is WCAG 2.2. The planner can confirm accessibility by providing a screenshot of the confirmation of accessibility provided by the accessibility checker embedded in the tool used to create the document.

10. What objective acceptance criteria and included revision rounds will apply to the March 1 progress report, April 5 draft, early-May presentation and May 28 final deliverables for purposes of the 10%/40%/50% payment schedule?

The planner is expected to complete deliverables in accordance with the timeline included in the RFP. Deliverables are described in the RFP and will be finalized in the agreement.

11. May a proposer rely on the proposed principal's relevant government strategic and operational planning experience gained outside the bidding firm, with individual project references, where the firm has not completed an LSTA plan? We understand the proposal must explain the comparable scope and the principal's actual contribution.

Proposers are welcome to include any relevant experience. Please see “Instructions to Submit a Proposal”, specifically, “Qualifications: Relevant skills, background, and experiences that make you a good fit for this project. Please include a list of similar or related projects that demonstrate expert level knowledge and experience evaluating and developing five-year LSTA and/or large scale strategic plans.”

12. For a Louisiana LLC performing the engagement entirely from outside California through the virtual methods described in the RFP, does PLP require any California or local business license, foreign entity registration, or other vendor registration? [Our Firm] would not propose obtaining an additional license.

The successful consultant is not required to obtain a California business license as part of this contract. A W-9 is required to be submitted as part of the contracting process.

13. Please provide the proposed services agreement and applicable insurance, data handling and vendor requirements. Is fully remote performance acceptable for all required activities, including the final presentation?

Please see the attached draft professional services agreement.

As there will be no confidential information, an NDA will not be required.

Page 3 of the RFP states: "Virtual engagement with the library community is prioritized at this time. If any in-person communication with State Library staff becomes possible, it will likely take place in Sacramento. If in-person communication with the library community becomes possible, gatherings would be regional and could take place in northern, southern, and central California."

At this time, all activities are written so that they may be performed virtually, including the final presentation. Should that change, the State Library and the Pacific Library Partnership would work with the Consultant to negotiate any in-person meetings required.

14. Please confirm the timezone for the September 30 question deadline and October 16 proposal deadline, and whether the stated 10% payment upon signing is payable before project work begins.

All dates and times listed are in Pacific Standard Time.

The Time Schedule includes a contract award date of Friday, November 13, 2026. PLP will begin the contracting process with the successful consultant, and once the contract is completed, the consultant may submit the first payment for 10%, per the Payment Schedule. The contracting process typically does not take more than a week, although it may take longer due to specific requests. The work begins with an initial meeting with the California State Library staff in December 2026.

15. I would like to confirm that all work can be done virtually.

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16. Does the PLP have photos to use to illustrate the plan, or will consultants be responsible for requesting photos from libraries?

The State Library has photos that can be used.

17. Can work on the plan begin before January 4, 2027?

Per the Time Schedule in the RFP, an initial meeting with State Library staff in December will occur, and work should commence by January 4. No work should begin until the agreement is signed with PLP. Reviewing of source material may commence earlier, if negotiated during the contracting phase. The State Library is on target to complete the LSTA review by January, which informs the time schedule listed.