1. **BACKGROUND**

The Office of Library Services operates within the Lake County Board of County Commissioners and provides administrative oversight to the Lake County Library System cooperative (System), which is comprised of six County branches and ten municipal libraries (Member Libraries). The cooperative is governed by three-year interlocal agreements between the ten municipalities and the County. The interlocal agreements define service levels, expectations, and policies. Lake County is the governing body with The Office of Library Services Director as the administrative head of the System. Lake County collects a Library Impact Fee for new residential construction and the funds are used for capital expansion of the System. The County also distributes appropriation funding annually to the ten municipalities for their participation in the System.

**Qualifications**

* 1. To be considered a qualified firm, the respondent should normally be engaged in performing the type of work specified by this Request for Proposal. Firms should have a minimum of five (5) years’ experience to be considered a qualified firm. Determination of satisfactory evidence of responsibility and satisfactory ability to perform the required services by the respondent shall be made solely by the Lake County Evaluation Committee.
  2. The Lake County Evaluation Committee may request on-site visits at the offices of any of the firms’ submitting proposals prior to making final recommendations to Lake County Board of County Commissioners.
  3. Firm should be experienced working with county and municipal clients in the state of Florida. Interested firms must be able to demonstrate measurable success in projects on behalf of counties and municipalities.
  4. Firm should have the personnel and resources to successfully handle the account the size of Lake County.

**SCOPE OF SERVICES**

Consultant shall assist with three projects: (1) library assessment study as more particularly described herein, (2) creating a metric and scoring system for awarding library impact fees, and (3) creating a metric/rubric for annual Member Library appropriations.

1. **IMPACT FEES**

Library impact fees are collected on new residential construction and can be used for fixed and non-fixed capital expansion of the System. Current procedure is defined by County policy and awards impact fee grants to System members to expand the System. Expansion is limited to capital items, which includes new construction, library expansion, public computers, and collections. Impact fee grants should address expansion and not deficiency. The current rubric scores each application for funding based on points and amount of funding available.

Consultant shall:

* 1. Conduct a review of how other governing bodies in Florida handle library impact fees.
  2. Recommended policy and procedural revisions.
  3. Provide a delineated process for applying, scoring, and distributing funds, including a new application form.
  4. Provide a new rubric or scoring methodology that is objective.
  5. Provide definitions and examples of eligible (legal) projects.
  6. Give Presentation(s) to Library Advisory Board, Lake County Board of County Commissioners and municipal administrations, and Library Administration on recommendations/best practices.
  7. Provide on-call service to answer questions of County.

1. **APPROPRIATIONS**

The System is governed by three-year interlocal agreements between County and participating municipalities. The interlocal agreements define the administrative structure of the System, including governance, policies, service guidelines, and appropriations.

County makes monthly appropriation payments to the ten member municipalities based on the current metric of circulation. A pre-determined amount of funding is set aside annually and each of the ten member libraries receives the same Base Amount (like an equalization grant). The remaining funds are dispersed based on physical items checked out to a resident or loaned to another library for checkout.

The appropriations seek to serve two purposes: (1) avoid double taxation of municipal residents (since residents pay a municipal and County library tax) and (2) pay the municipality for sharing staff, collections, and spaces with the residents of the County (municipal and unincorporated residents).

County desires a metric based on objective standards that can be neutrally and equally applied across the System and which cannot be overly influenced by subjective standards. The metric shall address the double taxation issue noted above, while balancing the needs of individual libraries based on size, budget, and services (i.e., a less funded and smaller library would have difficulty effectively and efficiently spending County appropriations funding).

Appropriations funding is not designed to replace municipal funding, but to provide supplemental funds to service all residents. County also provides many in-kind services to the cooperative, like the courier, purchasing all public service PCs, IT support, shared purchasing, cataloging, and communications.

Consultant shall:

* 1. Provide suggestions for the interlocal/appropriations regarding best practices, service levels, and encouraged behavior.
  2. Define fair share of appropriations and/or measuring system-wide expenditures from municipalities.
  3. Provide an objective and neutral metric for appropriations funding.
  4. Provide a clear procedure for calculating appropriations.
  5. Give presentation(s) to Library Advisory Board, Lake County Board of County Commissioners and municipal administrations, and Library Administration on recommendations/best practices.

1. **DELIVERY**
   1. Unless otherwise amended in writing, the performance period for completion of the initial effort must not exceed one hundred twenty (120) calendar days. The performance period for any subsequent update to the initial work must not exceed sixty (60) calendar days.
   2. Assistance with the implementing resolutions for the annual assessment program.
2. **COUNTY RESPONSIBILITIES**
   1. County is responsible for any newspaper publications, including, but not limited to, arranging for publications and any costs associated with those publications.
   2. County will work with Consultant after completion of the initial work effort, to:
      1. Exercise, as determined to be required, the optional effort included within the pricing table for periodic updates based on the most current historical or other associated data to support continued accuracy of fee assessments, and
      2. Provide a structure enabling Consultant to provide, at the hourly rates specified in the pricing table, technical and representative support regarding any litigation defense services that may be required during Contract duration.

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