

**THE SEATTLE PUBLIC LIBRARY
REQUEST FOR PROPOSALS**

**Market Segmentation Analysis
Platform & Implementation - RFP# SPL-R-1507-MR
Addendum #1 – August 7, 2015**

This Addendum provides clarification changes to the RFP, answers to questions submitted by 12:00 PM 08/07/2015, email list of attendees, and the pre-submittal presentation.

Clarification Changes to RFP:

1. Procedures and Requirements 8.1
Registration into City Registration System

Web link is incorrect. The correct link is:

<https://web6.seattle.gov/FAS/OBD/NewRegistration.aspx>

Additional information is available at:

<http://www.seattle.gov/city-purchasing-and-contracting/consultant-contracting>

2. Selection Process 10.1
Initial Screening
Last line:

“Additionally, proposals without the REQUIRED SYSTEM CAPABILITY MATRIX will be deemed non-responsive.”

Is hereby deleted and replaced with:

“Additionally, proposals without the single page listing each Minimum Qualification and how it is met will be deemed non-responsive.”

End Changes to RFP

Answers to Questions

The following are answers to questions submitted before the deadline:



1. Can we get a copy of these slides?
 - a. The presentation will be available on the website with the first addendum.
2. Your colleague stated that this is a "basic" market segmentation survey. Can you please provide further insights as to what you are looking for in terms of segmentation?
 - a. We would expect the selected vendor to use current market research best practices and proven instruments to help us understand the segments that comprise library users, non-users, supporters and others who live, work or attend school in Seattle.
3. Who completed the 2013 segmentation work with the millennials?
 - a. Paradoxes
4. Is there preference for a local vendor (all other things being equal)?
 - a. No. However, knowledge of the Seattle market is desired.
5. Can we get a copy of the previous market segmentation research completed by Paradoxes on the Millennials? Millennial Segmentation Study: Can we obtain a copy of the report? What was the methodology used for this research? The RFP refers to previous segmentation work done on the millennial generation in 2013. Can we have access to the final deliverable for that study?
 - a. We will share the completed research and data with the vendor selected. You can review a case study on the Paradoxes website. <http://paradoxesinc.com/portfolio/segmentation-guides-millennial-services-and-engagement/>
6. Do you expect the same or a similar questionnaire to be used for this study? Can we get a copy of the survey instrument?
 - a. We expect the selected vendor to propose instrument(s) that best serve the goals of this research.
7. Section 10.1 of the RFP indicates that a proposal without the "Required System Capability Matrix" will be deemed unresponsive. Can you clarify what the System Capability Matrix is and what information the Library requires to be included in that Matrix?
 - a. The requirement has been changed. Please refer to the RFP changes section within this Addendum #1. What is being requested is detailed in section "4. Minimum Consultant Qualifications". Instructions in section "9.2 Minimum Qualifications" remain the same
8. Is the overall goal to increase the number of patrons who use the library?
 - a. This is one of many goals of the library. We want to expand awareness of the wide variety of programs and services the library offers, reach underserved communities, and understand how to best serve our supporters and advocates, whether they actively use the library or not.
9. Do you have contact names, information for existing library users -- i.e., card holders and is that available for this research? Can we use that as sample? Can contact potential respondents via your database? You indicated strict privacy policies but what is their expectations of privacy?
 - a. We are able to contact those who have opted to receive e-mail.

10. What is the youngest respondent you seek?
 - a. While we serve patrons of every age, it is not likely that we will attempt to reach children under 13 for this research. We seek the guidance of the vendor selected on how to best approach this.
11. The RFP lists the importance of covering a diverse population/sample. All languages? Or only English and Spanish? What of Chinese, Korean, Vietnamese, etc.?
 - a. We will work with the selected vendor to define a limited set of languages most relevant to the populations we serve.
12. How should one approach the two RFPs (#SPL-R-1507-MR and #SPL-R-1506) if the firm's solution offers a combination of CRM and segmentation?
 - a. The two projects will be considered separately. You may submit information on how your combined solution and pricing may benefit the Library and it can be given consideration under the “Additional Capability” criteria.
13. Cardholder Database: Can you please confirm the total number of cardholders you have? What number have opted in to be contact? What types of contact information are provided? How many who have opted in for contact have provided email address? Phone numbers?
 - a. We currently have approximately 475,000 cardholders and 167,000 who have provided email addresses and opted to receive email. Our confidentiality policy restricts us from releasing patron phone numbers.
14. Do you have a similar database for Lapsed Library Users – i.e., those who have not renewed their cards?
 - a. Those records are periodically removed from our database unless they have outstanding fines.
15. At the top of Page 4 the RFP states “It is expected that the data set developed through this Market Segmentation Analysis will populate the CRM database as a framework for better understanding the distinct needs of the demographic segments that make up our community.” Can you please elaborate as to what is meant by this statement?
 - a. Any data generated through this research may be used to help us define segments in order to send targeted communications through the CRM platform we will implement this year.
16. You have specified completion of the entire project by 12/31/2015. You have a fairly wide range of dates listed on the front cover for interviews, selection, negotiation, execution—i.e., September to October 2015. What is your anticipated data for contract executive and a notice to proceed? Are there internal considerations that are driving this target end date—i.e., 12/31/2015? Conducting an effective segmentation survey is a relatively intensive process – both the discovery and analysis phases you have outlined need particular attention. There are also considerations for scheduling data collection and other tasks at this time of the year given holiday schedules. Is there any flexibility in the end date? The RFP Procurement Schedule indicates that the Contract Execution will occur in September-October 2015. In the RFP, the Library has indicated that the Consultant shall deliver all work items no later than 12/31/15. Can you clarify the amount of time that will be available to conduct the research?
 - a. We have budget allocated for this project in 2015, however we can work with the selected vendor to define a reasonable timeline for this work.

17. Page 15 under proposal response. You ask for references for each member of your project team as well as contacts for references on projects. There is considerable overlap. Can we provide three references for the projects and indicate which team members worked on which projects?
- There is no need to provide references for individual team members.
18. We are interested in the kind of demographic and usage information that the Library maintains on its patrons. Can you provide us with more detail regarding the type of demographic and usage data that will be available for this project? In addition, do you maintain a telephone number and/or an email address for your patrons, and if so, how complete is that information?
- We receive date of birth with the library card application. All other information is optional, and we are restricted from providing address or phone numbers from our patrons to third parties, however we are able to contact ~167,000 patrons who have opted to receive email. We are able to provide anonymized data on age and neighborhoods.
19. The RFP indicates that there will be a separate project to deliver and implement a CRM system and that the data set developed from the segmentation analysis will be integrated into that system. Could you describe what the nature of the relationship is expected to be between the selected Consultant for the market segmentation analysis and the selected Consultant for the CRM system?
- We are expected to choose a vendor for each of these project this year, and we will act as liaison for any communication required between the vendors.
20. RFP p. 3, Current Situation: This section references prior segmentation work focusing on the millennial generation.

Sub-question 1: What firm performed this work?

Answer 1. Paradoxes

Sub-question 2: What was the actual cost of that project?

Answer 2. The information was not available in time for the release of this Addendum document however it may be made available through a separate open records request.

Sub-question 3: Will you supply, as part of the current bid process, an electronic copy of the final report from the previous study, the segment “typing tool” (if one was created), and a summary of the current segments that the SPL is targeting, based on the previous study?

Answer 3. Selected vendor will have access to all research data delivered to us by Paradoxes.

Sub-question 4: For the currently proposed project, will the service provider be required to “accept” the segmentation of millennials created in 2013 (thereby ignoring the 18 – 30 age group)?

Answer 4. No.

Sub-question 5: Or will the successful bidder be encouraged to define the most appropriate behavioral and /or psychographic market segments, regardless of age (i.e. include those 18 – 30 years of age in the current study and let the data/analysis determine the best market segmentation)?

Answer 5. Correct.



21. RFP p. 4, Current Situation: In the last paragraph of this section, we find the first reference to a new Customer Relationship Management (CRM) system. Later (RFP p.5, Phase 1: Discovery, 4th bullet point), we find the requirement that certain output of the present project be identified for inclusion in the CRM system. Typically, when DRI runs a segmentation project, we produce a “typing tool” at the conclusion, which allows the client to assign future customers to the appropriate market segment, based on a minimal set of classification questions.

With this in mind, is it your intention that the “typing tool data elements” be identified for inclusion in the CRM, so that an actual segment assignment can be made for each customer?

If yes, then would you agree that these data elements cannot be identified until the segmentation study is complete and the typing tool has been created (a Phase 2 or Phase 3 deliverable)?

- a. We seek the selected vendor’s guidance on the most reasonable approach to making this data available to the CRM.

22. RFP p. 5, Phase 1: Discovery: What do you mean by “market definition?”

We assume the Seattle Public Library currently has a definition of its market. What is it? How does the SPL define a “prospective patron?” Anybody in the service area who is not registered? Anybody in the service area who is not registered and has not used Library resources? Something else?

- a. A prospective patron is one who has not used and may not be aware of the library’s programs and services. Our market is anyone who currently lives, works or attends school in Seattle, whether they use the library or not. Our target segments may include non-library-users who wish to support the library through donations, volunteering, etc.

23. RFP p. 5, Phase 2: Research and Analysis: The RFP references qualitative research (focus groups and IDI’s). Do you have specific ideas on appropriate qualitative research (presumably as the basis for focused quantitative data collection)? Or are you looking to prospective suppliers to make a recommendation?

- a. We are looking for recommendations.

24. RFP p. 5, Phase 2: Research and Analysis: Will the SPL provide patron contact information (specifically e-mail address), that can be used for the quantitative portion of the study?

- a. We can provide email addresses for those who have opted to receive email from us.

End Answers to Questions

End of Addendum #1
No other items, dates, or deadlines for this RFP are changed.

Email List of Pre-Submittal Conference attendees:

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The Seattle Public Library

Pre-Submittal Conference for:

Market Segmentation Analysis

SPL-R-1507-MR

Pre Submittal Agenda

- RFP Process Overview
- Review of proposal and scope of work
- RFP Process Overview
- Communication Guidelines
- Important Dates
- Required Documents
- Questions & Answers

Review of proposal and scope of work

- Phase 1: Discovery
- Phase 2: Research and Analysis
- Phase 3: Reporting



RFP Process Overview

- A need is determined at the Library and a project is developed
- Library solicits proposals to meet project goals
- Firms Propose their solution via RFP response
- Library reviews quality of response in accordance to criteria
- Best value to Library determined and a selection is made
- Library and selected respondent negotiate agreement
- Move to next best response if no agreement possible
- Execute contract and begin services

Communication Guidelines

- All communications must be through Sr. Buyer

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Important Dates

- Pre-Submittal Conference Today, August 5, 2015 2:30 PM
- Questions Due August 7th, 2015 12:00 PM
- Submittal Deadline August 31st, 2015 3:00 PM
- Review and Award September – October 2015
- Negotiation September – October 2015
- Contract & Execution September – October 2015
- Project Start September – October 2015

Required Documents

- Respondent Questionnaire
- Proof of Legal Business Name
- Minimum Qualifications Sheet
- Contract Exceptions if any
- Proposal Response Sections A - E

Proposal Response

- Qualifications and References
- Demonstration of Experience
- Market Segmentation Analysis Plan
- Additional Capability
- Cost Proposal

Note: Your response is directly tied to Evaluation Criteria

How to deliver the Proposals

- Email only!
- In PDF format
- All pages must be combined into one document only
- Submit your proposals before the deadline
 - Email Title should have RFP #, Name of Project & Name of Firm in the following format:

PROPOSAL: SPL-R-1507-MR – MKT SEG – YOUR COMPANY NAME

RFP Document Erratum

- Procedures and Requirements 8.1
 - Registration into City Registration System
 - Web link is incorrect. The correct link is:

<https://web6.seattle.gov/FAS/OBD/NewRegistration.aspx>

Additional information is available at:

<http://www.seattle.gov/city-purchasing-and-contracting/consultant-contracting>



Questions and Answers

- Questions may require extensive consideration before answering
- All official responses will be in the form of an addendum
- All questions must be in writing for inclusion in addendum
- Please type your questions in the Web meeting chat space