



Branch District Library  
10 E. Chicago St.  
Coldwater, MI 49036  
Ph: (517) 278-2341  
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## Request for Proposal Strategic Planning

### PROJECT

The Branch District Library (BDL) is seeking consultant services to assist the Board, staff, and community in developing a comprehensive strategic plan. The plan will include a vision statement, a mission statement, goals, measurable objectives, and proposed activities to meet expressed community needs for library service over the next five years. It will examine community growth patterns and demographics and identify the need for services and facilities with respect to future trends in collections, programming services, and technologies. It will also analyze funding needs to respond to goals.

### BACKGROUND

The Branch District Library (BDL) is located in Branch County, Michigan, and is composed of six branch locations—Algansee Branch, Bronson Branch, Coldwater Branch, Quincy Branch, Sherwood Branch, Lucille E. Dearth Union Township Branch. The system is governed by a seven member Board of Trustees, appointed by the Branch County Board of Commissioners. The BDL is an independent unit of local government under Michigan law, responsible for levying operational funds and providing Library services to a population of 43,644 residents. The BDL currently serves approximately 24,400 active cardholders with a collection of 125,438 items housed in the six branches. Annual circulation for the recently concluded 2016 fiscal year was 237,927. The Library's current annual operating budget is approximately \$1.67 million.

The Branch District Library's six branches serve 16 townships and 4 public school districts. The BDL serves urban and rural communities. Administration offices are located in the Coldwater Branch; this branch also houses the Holbrook Heritage Room. The BDL is seeking to update its strategic plan and address its mission as well as ensure that facilities, collections, services, technology, staffing, and funding will meet the needs expressed by the community. The mission of the BDL is to provide the resources and relevant services to create an environment conducive for library use, while maintaining financial stewardship and accountability.

### CONTACT PERSON:

Chief Contact Person for this contract is Linda Lyshol, Library Director, Branch District Library, (517) 278-2341, [lysholl@branchdistrictlibrary.org](mailto:lysholl@branchdistrictlibrary.org)

### SCOPE OF WORK

The consultant will solicit, collect, analyze, and interpret input from the community at large, the Library staff, and the Board of Trustees regarding the current state of library services with the goal of identifying services to continue, develop, drop or improve. The consultant will analyze and interpret findings and present these to the Library Director and Board of Trustees. The

consultant will facilitate a consensus building process and assist the organization in revising the Library's mission statement and setting strategic goals.

Based on a mutually agreed upon timetable, the consultant will provide the Library Director and Library Board with a plan to gather information, synthesize responses, and provide regular updates throughout the process. The consultant will prepare a final version of the strategic plan including goals, objectives, and strategies.

#### METHODOLOGY

The library is not committed to any particular methodology for generating the strategic plan. The method proposed by the consultant response must include:

1. How the process will be structured, including reference to any specific library planning method.
2. Descriptions of methods that will be used to engage community members and gather their input.

#### PROPOSAL FORMAT

The proposal shall include, at a minimum, the following:

##### Project Work Tasks:

Describe the specific approach and methods the firm will use to complete the project. A proposed work schedule, timeline for deliverables and a list of any products must be included.

##### Project Staffing & Management Plan:

Identify the staff persons or subcontractors who will be responsible for carrying out the specific work tasks. Identify the project manager who will be the person responsible for assuring that all work tasks are completed on schedule. Describe the relevant qualifications of personnel to be assigned to the project.

##### Cost Proposal:

Identify the total "not to exceed" cost for completing all individual work tasks included in the proposal. Include any direct, indirect or reimbursable costs. A proposed billing schedule should include the total cost of services, supplies, materials, travel, and any other relevant expenses.

##### Qualifications of Firm and Prospective Team Members:

State the firm's experience with comparable projects including the names and telephone numbers of three client references. Include resumes for all principal members of the project team and any proposed subcontractors. Provide contact information for at least three organizations for which the consultant has provided strategic planning services and one sample of a complete report that the consultant has prepared for a similar project.

## EVALUATION

Proposals will be evaluated based on methodology, proposed cost, and company experience. The Library Director will analyze the proposals received and make a recommendation to the Library Board. Final contract approval is made by the Library Board of Trustees.

## FINAL PRODUCT

The BDL expects the following key deliverables from the consultant at the conclusion of the project:

- 1) A written strategic plan integrating the elements described in this RFP.
- 2) An implementation plan with timelines to achieve recommendations contained in the strategic plan.
- 3) A data package which incorporates all statistics, reports, surveys, technical evaluations, facilities data, drawings and any other supporting data used during the planning process.
- 4) A multi-media presentation to the Board of Trustees and other stakeholders to communicate highlights of the Strategic Plan.

All project deliverables will be provided in printed and electronic formats. All electronic material shall be provided in mutually agreed upon software formats. The final product and all related materials shall be the sole property of the BDL.

## PAYMENT

The BDL will make periodic payments during the course of the project. Costs specified in the response must remain valid for at least six months from date of Proposal being received.

## SCHEDULE TO RECEIVE AND ANALYZE PROPOSALS.

Proposals shall be submitted to the Library Director no later than 5:00 p.m. EST on Friday, March 17, 2017. Proposals may be delivered to or emailed (proposals submitted digitally must be in Microsoft Word or pdf format).

Linda Lyshol,  
Library Director  
Branch District Library  
10 Chicago St.  
Coldwater, MI 49036  
Or e-mailed to [lysholl@branchdistrictlibrary.org](mailto:lysholl@branchdistrictlibrary.org)

## SCHEDULE TO RECEIVE AND ANALYZE PROPOSALS.

Dates:

February 21, 2017: RFP distributed and posted  
**March 17, 2017: Proposals due**  
March 27-31, 2017: Interviews/Selection  
April 2017: Work to commence