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REQUEST FOR PROPOSALS FOR STRATEGIC PLANNING SERVICES

Posted June XX, 2023

Brief Project Description

The Branch District Library (BDL) is seeking the services of a consultant to assist the Board, staff, and community in developing a comprehensive strategic plan in 2024. The plan will include revised mission/vision statements, 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

Formed in 1991, the Branch District Library (BDL) serves more than 46,000 residents of Branch County, Michigan, and neighboring Allen Twp. of Hillsdale County. The Library is composed of six locations around Branch County. BDL, an independent unit of local government under Michigan law, is governed by a seven-member Board of Trustees, appointed by the Branch County Board of Commissioners and the City of Coldwater.

BDL currently serves more than 14,000 active cardholders with a collection of over 108,000 items housed in the six branches, and a digital collection of almost 1.5 million items. The Library also offers a variety of services to our patrons, including access to computers, wireless Internet, mobile printing, and great programs and events for all ages.

In 2022 the Library had 113,927 in-person visits, with a circulation of 142,637 items. BDL's typical annual operating budgets are approximately \$2 million.

Additional Information Online

- Annual Reports: https://www.branchdistrictlibrary.org/annual_reports
- Audits: <https://www.branchdistrictlibrary.org/audits>
- Budgets: <https://www.branchdistrictlibrary.org/budgets>



BDL ADMINISTRATIVE OFFICES

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- Comprehensive Statistical Report: <https://www.branchdistrictlibrary.org/stats>
- Historical timeline: https://www.branchdistrictlibrary.org/bdl_timeline
- 2018 Strategic Plan: https://www.branchdistrictlibrary.org/governing_documents

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. 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, and present these findings to the 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.

Methodology

The Library is not committed to any particular methodology for generating the strategic plan. The method proposed by the consultant's 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

Submitted proposals must 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 and 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. 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

Submitted 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 BDL Board of Trustees. Final contract approval is made by the Library Board of Trustees.

Final Product

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

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, Analyze, and Select Proposals

June XX, 2023	RFP Posted
September 8, 2023	Proposals Due
September 11, 2023 - November 17, 2023	Evaluation and Interviews
November 20, 2023	Selection by BDL Board of Trustees
After January 1, 2024	Work to commence

Proposals must be submitted to the Library Director no later than 5:00 p.m. EDT on Friday, September 8, 2023. Proposals may be delivered to or emailed (proposals submitted digitally must be in Microsoft Word or pdf format) to:

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