



Strategic Planning

Request for Proposal

January 27, 2016

A. Objective

The Round Lake Area Library (RLAL) is seeking a consultant to develop a comprehensive 5 year strategic plan for the library that includes a significant community research component.

B. Deadline for receipt:

Proposals must be received via email before 10:00 am Wednesday, March 2, 2016. Proposals should be addressed to Jim DiDonato, Executive Director, Round Lake Area Library and emailed to jdidonato@rlalibrary.org.

C. Inquiries

Inquiries must be made via email. Please address all inquiries to: jdidonato@rlalibrary.org. Telephone inquiries will not be addressed. Answers will be provided within 3 business days.

D. Scope of Work

RLAL is seeking an experienced, professional facilitator to perform the following:

1. Facilitate the strategic planning process using a methodology effective for public libraries.
2. Gather data through community research that focuses on library users, non-users, municipalities, businesses, educators, and stakeholders (including board and staff) to identify library needs/wants as well as ways to meet demand for library programs, increase attendance and circulation, new services, and library usage. Use of a third-party research firm is acceptable, and RLAL will also accept proposals for this individual component.

Community input is a key component of this planning process, and must include:

- i. Focus groups / public input sessions / individual interviews
- ii. Paper/online survey
- iii. Other methods as identified by the consultant
- iv. Surveys and other types of gathering data must be conducted in both English and Spanish. Please include costs for survey translation and other multi-



Round Lake Area Public Library

language components. Also feel free to include in your proposal suggestions for handling research in diverse communities such as Round Lake.

3. Facilitate planning meetings and public, board, and staff input sessions.
4. Review the current mission statement, make revisions as required, and create core values.
5. Research and analyze existing services and collections to establish existing conditions.
6. Identify service priorities, goals, objectives, and activities.
7. Write and present the strategic plan that will be communicated to the library's stakeholders. The final deliverable should include:
 - i. An up-to-date community profile and identification of the community, including data identifying socio-economic, ethnic, education, school lunch statistics, and population "heat map" data.
 - ii. An assessment of the library's environment, including evaluation of strengths and weaknesses, quality of services, reputation, management, and budget, etc.
 - iii. Specification of the mission and core values of the organization.
 - iv. Clearly defined priorities, goals, and objectives that are measureable and for which the library will hold itself accountable.
 - v. Specification of a built-in process of regular review, evaluation and adjustment to the plan resulting from changes in the economic, demographic, or political climate.
8. All raw and summary data is to be delivered to RLAL at the conclusion of the planning process.

E. Proposal Content Requirements

1. A cover letter providing a brief description of the firm or individual, name, address of consultant, telephone number, email of principal contact person, and year firm was established.
2. Executive summary of the highlights of the proposal, not to exceed one page in length, and conveying the consultant's understanding of the purpose and expected outcomes of the project.
3. A list of key personnel who would be involved in the process and their expertise/experience. If you plan to contract with a third-party vendor to conduct the community research component, please identify what firm you plan to use.
4. A summary of the consulting firm's qualifications and relevant experience. The successful firm and their subcontractors will have demonstrated expertise in library operations, services, trends and functions as well as strategic planning experience.



Round Lake Area Public Library

5. A work plan that includes a description of the methodology, tasks, timeline and estimated total amount of time that would be spent on the project. Responses that fail to include a timeline will not be considered.
6. Exclusions or exceptions. Note any parts of the proposal that is beyond the expertise of the consultant, or would be better handled by local library staff.
7. A schedule of costs that includes consulting, supplies, number of onsite visits and cost per trip, and other costs associated with the planning process. Costs for data gathering and analysis (community research component) must be listed separately.
8. A listing of all resources you will need to have supplied by the library.
9. A sample plan conducted for another library within the past three years.
10. References and contact information for three organizations for which the facilitator has provided strategic planning services. One of the three references must be a public library.

F. RFP Standards and Selection Criteria

1. RLAL reserves the right to cancel the award of contract any time before the execution of the contract by both parties. The responding consultants bear sole risk and responsibility for costs incurred in the preparation of the proposal.
2. No library board or staff member shall have a financial interest in this proposal.
3. In cases of disputes over differences of opinions as to the services in the proposal, the decision of RLAL shall be final.
4. RLAL reserves the right to ask for clarification in the proposal if the need arises, and to select a planning consultant based directly on the proposal or to negotiate further with one or more respondents.
5. RLAL reserves the right to reject any or all responses to this RFP, waive irregularities and technicalities, and make an award in the best interest of the library.
6. The proposal will be evaluated by RLAL and will include the following criteria:
 - i. Responsiveness of the written proposal to the purpose and scope of the project.
 - ii. Demonstrated knowledge, skills, and experience in conducting strategic planning projects for public libraries.
 - iii. Methodology and timeline for carrying out tasks in the scope of work.
 - iv. Cost to complete the process.
 - v. Ability to meet deadlines and operate within budget.
 - vi. Positive experience and success in strategic and library planning; satisfactory performance record (references).

G. Budget and Administration

The consultant will be retained by RLAL. The project will be managed by the Executive Director. The District expects to enter into a contract with one-third partial payment provided to consultant following project milestones with the selected firm.



H. RFP and Planning Process Timeline

January 27, 2016	RFP issued to public
March 2, 2016	Proposals due, via email, to Jim DiDonato, Executive Director, by 10:00 am Wednesday, March 2, 2016
March 3, 2016	Bid opening and evaluation. The library will start evaluating submitted proposals at 10:00 am in the Executive Director's office, Thursday, March 3
March 23, 2016	Consultant selected and confirmed at March 23 board meeting
April 15, 2016	Strategic planning process begins no later than April 15
August 15, 2016	Draft plan and executive summary due to Executive Director
August 24, 2016	Board review of draft plan at August 24 board meeting
September 28, 2016	Final plan to be presented in person at the September 28 board meeting

Jim DiDonato
Executive Director
Round Lake Area Public Library District
906 Hart Rd, Round Lake, IL 60073
Phone: (847) 546-7060, ext. 127
e-mail: jdidonato@rlalibrary.org
Fax: (847) 546-7104
URL: <http://www.rlalibrary.org>