

Elm Grove Public Library

Library Director: Sarah Muench

Request for Proposal: Strategic Planning Services

The Elm Grove Public Library (EGPL) of the Village of Elm Grove, Wisconsin is seeking proposals from responsive and qualified library consultants (“Consultant”) to conduct and facilitate a strategic planning process to replace the current strategic plan which will expire in June 2023. The Consultant will work with the EGPL Board of Trustees (“Library Board”), the Library Director, library staff and other stakeholders to create a strategic plan for the next five years of library service. The EGPL requires a strategic plan that includes prioritized goals for its overall operations including collections, programming, technology, staffing and facilities. The purpose of the strategic plan is to position the EGPL to continue to provide services that meet the current and future library service needs of the Elm Grove community and enable the EGPL to make thoughtful service and resource allocation decisions.

The successful Consultant must have demonstrated experience working with public libraries in creating and successfully completing strategic planning projects in a timely manner and within the prescribed budget.

Proposals received in response to the EGPL Request for Proposal (RFP) shall be considered valid for sixty (60) days from date of receipt. To be considered for this work, you must follow the EGPL guidelines for the RFP and submit your proposal with all referenced attachments electronically to Library Director Sarah Muench by noon CST on **October 12, 2022**.

Background

The April 2021 population of the Village of Elm Grove (EG) was 6,513.ⁱ Several schools are located in EG including Pilgrim Park Middle School and Tonawanda Elementary school (both part of the Elmbrook School District), Elm Grove Lutheran School and St. Mary’s Visitation School. The EGPL is located within the Elm Grove Village Hall which also houses the Village administrative offices, court room, Police and Fire Departments among other functions.

EGPL serves patrons who are residents of EG, 4,588 of whom are registered EGPL card holders as of 2019ⁱⁱ. In addition, EGPL serves patrons from many other communities as evidenced by the fact that in 2019 EGPL shipped 26,097 items to other libraries. During the same year, 89,112 patrons visited the EGPL, its total circulation was 109,558 and it received 7,000 reference requests.ⁱⁱⁱ In 2019, EGPL staff was comprised of three full time and ten part time employees which equated to 6.76 full time equivalent employees^{iv}. The print collection consisted of 48,579 books and the audio-

visual collection consisted of approximately 15,779 items^v. The EGPL is open 56 hours per week year-round and its operating budget for 2022 is \$479,820.

The EGPL is governed by a Library Board whose trustees are appointed by the EG Board of Trustees. EG Board of Trustees funds the EGPL, which also receives donations from various community donors and organizations including the Friends of the Elm Grove Library. EGPL is a member of the Bridges Library System, which includes twenty-four libraries in Jefferson and Waukesha Counties.

Location and Building Information

The EGPL occupies 9,150 square feet of the EG Village Hall. The EGPL has been operating continuously since its establishment in 1962. The Village Hall is located on the EG Park which also includes tennis courts, a public pool and splash pad, pond, walking paths and recreational fields for a variety of sports including baseball, soccer, and football. The EGPL also has access to common rooms in the Village Hall. The 1536 square foot Parkview Room for EGPL Board of Trustee meetings and the 1792 square foot O'Neill Room for children and adult programming. The EGPL is comprised of several functional areas, including areas for the adult, teen and children's collections, a study room, and staff and administrative areas. The Village Hall provides EGPL storage space in its basement and EGPL patrons utilize public parking adjacent to the Village Hall.

Scope of Services

EGPL is seeking an experienced professional to perform the following services:

- Review existing library operations including the served population (resident and non-resident), total circulation, collection size and composition, documentation including the current strategic plan and the EGPL Annual Reports for 2019, 2020 and 2021.
- Review the just completed FEH Design Facilities Assessment Report ("FEH Report") including appendices and community survey results.
- Facilitate the strategic planning process using a methodology that has proven to be effective for public libraries, particularly those of comparable size.
- Determine what, if any, additional information needs to be gathered, beyond the data currently available from EGPL Annual Reports, FEH Report including its appendices and survey responses and other data available from the Library Director and public records. While it is possible that information gaps will need to be addressed via additional interviews, focus groups and other methods of acquiring community

input, EGPL wishes to avoid duplication of effort, particularly given the effort and cost recently expended to complete the FEH Report.

- To the extent informational gaps are identified, propose cost efficient measures to address such gaps in a timely manner consistent with the overall timeline established for this project.
- Facilitate strategic planning meetings and input sessions including, without limitation, those involving the Library Board, Library Director, library staff and community stakeholders.
- Working with the Library Board and Library Director, write and present to the Library Board and Library Director the proposed final draft of the five-year strategic plan based on the input received and other sources. The proposed plan should address:
 - the library services needs of the community,
 - where EGPL can have the greatest impact,
 - opportunities for collaboration with community stakeholders
 - the major requirements for implementation, measurement of progress and administration of the plan, and
 - the communications program to clearly and concisely inform the community of the new plan and its prioritized service goals, objectives, strategies and the primary reasons therefor.
- Present the final report, including proposed final strategic plan, to the Library Board, staff, other stakeholders and the public at large upon completion of the strategic plan.

Final Report

The final written report should contain an executive summary, an explanation of the strategic planning process, and all collected data as appendices. All files, records, documents, and similar items relating to the business of the EGPL, whether prepared or received by the Consultant for purposes of this engagement, are and shall remain the exclusive property of EGPL. An in-person presentation of the final strategic plan shall be made to the Library Director and Library Board.

Selection Criteria

EGPL is seeking a consultant experienced in providing the services outlined above. All proposals meeting the RFP requirements will be evaluated considering the following criteria among other factors:

- Relevant recent experience and success in satisfying library clients in the performance of comparable strategic planning projects for public libraries.
- A list of at least three library references for which you have recently completed similar projects, including the contact names, telephone numbers and email addresses for each reference.
- Demonstrated knowledge of library operations, research, statistical analysis, and experience integrating findings in strategic planning documents.
- A record of cost efficiency, meeting deadlines, staying within budget, and delivering a product that meets or exceeds library clients' expectations.
- A reputation for excellent communication skills with relevant stakeholders.
- Proposed price and terms and conditions of the offer.

Note: EGPL will make its award based on a quality-based selection process with price being only one of the factors that will be considered.

Proposal Format and Submission

The proposal shall include:

- Introduction: provide a cover letter noting name, address, email address, phone number, key contact person and number of years in business.
- Overview: narrative of the Consultant's understanding of the project and a summary of the Consultant's objectives.
- Plan of work and technical approach: including a description of the proposed course and plan, sequence of tasks, assumptions, methodologies, estimated time that would be spent on this project, project schedule and milestones, assumptions and variables that could delay the project.
- A schedule of costs and fees including supplies, data gathering, number of visits and cost per visit and other costs associated with the project.
- List of resources you expect the EGPL to provide and specifically note any part of the RFP that are excluded from the proposal.
- Sample material such as a strategic plan document.
- Disclosure of any ongoing or potential litigation or administrative proceedings including arbitrations related to projects managed by the Consultant.
- A description of how the Consultant will solicit and incorporate feedback from the Library Director, the Library Board, the library staff, the Village Manager,

community stakeholders and others who are contacted as needed throughout the process.

Personnel

- List the principal(s) in your organization, including an organizational chart.
- Identify the project manager and key personnel who would be assigned to this project, their project roles, estimated percentage of project time associated with each of the identified personnel and relevant qualifications and experience.
- List any additional consultants or third-party vendors that you propose to hire to supplement your firm's services, including names and relevant experience.

Questions and Bid Date

All questions regarding this RFP are to be directed in writing to the Library Director at muench@elmgrove.lib.wi.us by noon on Thursday, October 6, 2022.

Proposals are due no later than Wednesday, October 12, 2022 at noon CST. Proposals must be submitted electronically to: Sarah Muench, Library Director, Elm Grove Public Library, 13600 Juneau Boulevard, Elm Grove Wisconsin 53122 at the stated email address.

Fax proposals will not be accepted. It is the respondent's responsibility to ensure proposals are received by the deadline. Proposals received after the deadline will not be considered.

Selection Process

Respondents submitting proposals may be invited to participate in an interview with the Library Director and one or more members of the Library Board. The Library Director will evaluate the proposals, consult with references, and make a recommendation to the Library Board. Following its deliberations and determination, a contract may be prepared and executed if acceptable to the Library Director and the Library Board.

EGPL reserves the right to award a contract (subject to finalizing a mutually acceptable agreement which the parties will execute), reject any and all responses to this RFP in its sole discretion, cancel the award of a contract anytime before the execution of the contract by both parties and waive or modify any provisions of this RFP or cancel the RFP in part or whole. The RFP does not obligate the EGPL to award a contract, to pay

any costs incurred in the preparation of a proposal for this RFP, or to procure or contract for any services. The EGLP and the Consultant may agree to add additional areas to the contract by mutual agreement at a later date. The EGLP may elect to stop work at any time in the contract and will pay for work completed to that point on a time and material basis. The EGLP also reserves the right to amend the RFP, as necessary. All proposal and materials submitted will become the property of the EGLP. No Library Board or EGLP staff member shall have any financial interest in any Consultant, proposal or contract submitted or awarded pursuant to this RFP.

ⁱ April 2021 census population from US Census Bureau (census.gov)

ⁱⁱ EGLP Public Library Annual Report for 2019. 2019 is cited generally because it was a far more representative year than 2020.

ⁱⁱⁱ Ibid

^{iv} Ibid. As of September 1, 2022, the EGLP staff was comprised of three full time and 11 part time employees.

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