

**Request for Proposals
Strategic Planning Services
February 8, 2019**

INTRODUCTION

The purpose and intent of this Request for Proposals (“RFP”) by the Wallingford Public Library (“library”) is to solicit proposals from qualified consulting services (“consultant”) to develop a three-year strategic plan for the Wallingford Public Library.

AWARD TIMELINE

- February 8, 2019 – Release and distribution of RFP
- February 28, 2019, 5:00 p.m. EST – Deadline for submitting proposals
- March 23, 2019 – Finalists notified
- April 1-12 – Finalist interviews
- April 17, 2019 – Consultant selected
- April 22, 2019 – Consultant signed

INSTRUCTIONS / GENERAL INFORMATION

Questions related to the RFP and the selection process must be made in writing and directed to Jane Fisher, Director, by e-mail: jfisher@wallingfordlibrary.org

All relevant questions and responses to inquiries will be available via email. If you wish to receive such information by email, please submit your company name, contact name, mailing address, email address and telephone number to: jfisher@wallingfordlibrary.org

Proposals will be accepted by the Library Director, 200 North Main Street, Wallingford, CT 06492 until 5 p.m. on **February 28, 2019**. Proposals may not be withdrawn for a period of 90 days after the submission deadline. Two (2) printed copies, and one (1) electronic copy (via email to jfisher@wallingfordlibrary.org) of the proposal shall be submitted.

LIBRARY BACKGROUND

The Wallingford Public Library is a 501(c)3 association library governed by a 15-member Board of Managers. The annual operating budget is \$3,194,000 with the majority of funding coming from the town of Wallingford. The Library employs 55 people, 20 of whom are full-time, and it operates a main library and a small branch. Regarded as one of the central assets in the community, the Library is known for its professional and friendly customer service, an ample collection of traditional and non-traditional items to borrow, engaging public programs, a large and welcoming facility, and access to state-of-the-art technology, including its Collaboratory, a 2,400-square-foot makerspace, digital media lab, and co-working space.

Library Mission:

By offering a wide array of resources and experiences and by connecting people in our community with ideas and with each other, the Wallingford Public Library ensures every resident has the opportunity to be inspired, enriched, and informed.

Library Vision:

The Wallingford Public Library will be viewed as the hub of the community where all are welcome.

- The collection will evolve to meet the changing needs and demographics of our community, including the continued expansion of digital materials.
- Our programs will act as opportunities to bring community members together – to learn together, to support one another, and to be inspired.
- We will expand the array of supports for access to online information and materials, for both consumption and creation, and continue to be a go-to place for helping our community with technology.
- The configuration of our facilities will be assessed to best meet the needs of our patrons and to ensure the building's long term maintenance.
- As one of our strongest assets, our staff will feel valued and will have opportunities for professional development.
- Our Board of Managers will be a committed, engaged group of community members, representative of our diverse community.
- We will work in collaboration with our community partners to ensure our collective efforts address the needs of the community.
- The Library will foster a strong sense of community identity, spirit and pride through its collections, programs, facilities and other services.

Library Values:

Access for All: We provide equal access to our collections, programs, facilities and services.

- **Excellence:** We maintain high standards of customer service and strive for excellence in the services and resources we provide.

- Respect: We embrace people from all walks of life and treat individuals with respect and dignity.
- Personal Growth: We strive to provide all people with the opportunity to grow and achieve their life goals.
- Kindness: We show compassion and offer support to our patrons.
- Innovation: We actively seek out opportunities to blend new ideas and methods into our work.
- Responsibility: We offer high quality services in a safe, secure and fiscally responsible environment.

SCOPE OF SERVICES

Evaluation of Present Status:

- Review the current mission, vision, and values and assist in updating as needed
- Review results of the CT State Library Best Practices Self-Assessment
- Review key performance measures

Community Analysis:

1) Work with library staff to gather and review data regarding the needs and motivations of library users, non-users, and stakeholders (including the library board members, director, and staff).

Existing data to be considered by the consultant shall include:

- Results of a community survey
- Knowledge gained from completing the Aspen Institute Action Guide for Re-Envisioning Your Public Library community dialogue process

Note: The community survey and *Aspen Action Guide* process will be completed by library staff in the winter and spring of 2019, prior to the consultant coming on board.

2) Develop and implement additional data gathering methods to identify the community's motivations and assess how those motivations align with current and/or future library services.

Moderate Planning Process: Facilitate all stages of the strategic planning process, including meetings, interviews, and/or focus groups with library users and non-users, stakeholders, local government officials, and community leaders.

Draft Plan: Work collaboratively with the board of managers, director, and staff to develop a written, comprehensive strategic plan that establishes goals, objectives, and activities for programs and services, collections, facilities, personnel, technology, relationships, and infrastructure. The final plan should include a process for regular review, evaluation, and adjustment to the plan as needs of the community and/or the climate in which the library operates changes during the course of the plan. Present final draft to Library Board of Managers.

TIMELINE

The consultant's role in the planning process is expected to begin in July 2019 and be completed on or about November 25, 2019.

PROPOSAL CONTENT

Proposals should include the following sections:

A. Contact information. Name, address, phone number, and email address of the firm, and the name and contact information of the person with whom to communicate concerning your proposal.

B. Profile describing you and/or your firm's experience developing strategic plans for libraries and/or non-profit organizations.

C. Key personnel. Provide brief profiles of key people who would be assigned to work on this planning process.

D. References. Name, phone number, contact person and mailing address of at least three references, preferably public libraries or non-profit organizations for which similar services have been provided in the last three years.

F. Project narrative. Provide a detailed description of the proposed approach to the strategic planning process including an outline of process you propose, benchmarks, and a timeline for completing the tasks outlined in the scope of services. Include proposed methods of engaging community members (including non-users), stakeholders, government officials, and community leaders.

G. Cost. All proposals shall identify the work schedule and shall include a fee and payment schedule. If the consultant wishes to provide a variety of options for carrying out this planning process, they shall include separate fees for the optional components.

H. Additional Information. Consultants may provide additional information in support of their proposals including examples of recent strategic plans.

SELECTION CRITERIA

- The background, specialized experience, and expertise of the consultant with respect to the type of services required
- Past experience with references for comparable work
- Past experience with public libraries
- Proposed cost for the services
- Reasonableness of fee for the scope of work

TERMS & CONDITIONS

The Library reserves the right to reject any and all proposals that are deemed not responsive to its needs, and to waive minor irregularities in any proposal.

The Library reserves the right to request clarification of information submitted, and to request additional information on any proposal.

Any proposal may be withdrawn up until the date and time set above for opening of the proposals.

If a selection is made as a result of this RFP, a contract with fixed/known prices will be negotiated. Negotiations may be undertaken with the proposer who is considered to be the most qualified for the work. This RFP is primarily designed to identify the most qualified firm or individual. Price and schedule will be negotiated with the "first choice" proposer. Negotiations may be instituted with the second choice and subsequent proposer until the project is canceled or an acceptable contract is executed.

The contents of the proposal of the selected proposer shall become contractual obligations if a contract ensues. Failure of the proposer to accept these obligations may result in cancellation of their selection.

The Library reserves the right to award any contract to the next most qualified proposer, if the successful proposer does not execute a contract within 30 days of being notified of selection.

The contract resulting from acceptance of a proposal by the Library shall be in a form supplied or approved by the Library, and shall reflect the specifications in this RFP.

The Library makes no representations or warranties, expressed or implied, as to the accuracy or completeness of the information in the RFP, and nothing contained herein is or shall be relied upon as a promise or representation, whether as to the past or the future. The RFP does not purport to contain all of the information that may be required to evaluate the RFP and any recipient hereof should conduct its

own independent analysis of the Library and the data contained or referenced herein. The Library does not anticipate updating or otherwise revising the RFP. However, this RFP may be withdrawn, modified or re-circulated at any time at the sole discretion of the Library.

The Library reserves the right to reject any proposed agreement or contract that does not conform to the specifications contained in this RFP.

The Library reserves the right, at its sole discretion and without giving reasons or notice, at any time and in any respect, to alter these procedures, to change and alter any and all criteria, to terminate discussions, to accept or reject any response, in whole or in part, to negotiate modifications or revisions to a response and to negotiate with any one or more respondents to the RFP.

ATTACHMENT: Wallingford Public Library Strategic Plan 2014-2019



Wallingford Public Library

Strategic Plan

2014 - 2019



C O N N E C T I O N



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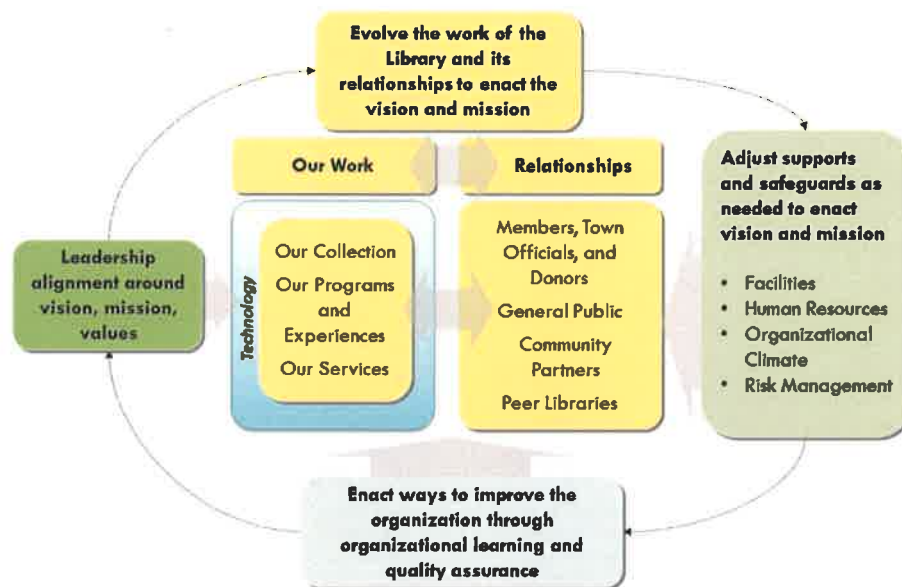
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INTRODUCTION

At the outset of the strategic planning process, the Long Range Planning Committee raised key questions that the process should address: *Due to the changing nature of technology, how do community members want to utilize the Library? What are the needs of our community and how can the Library address those needs? What changes should be undertaken to move in that direction?*

To answer these questions, the committee, with support from Anne Yurasek of Fio Partners, undertook a robust information gathering process over five months that engaged over 900 members of the community and included individual interviews, focus groups, an online community survey, research, and internal analysis.¹

The information gathered created a foundation to inform the development of the strategic plan. The plan acts as a framework for improving and changing the Library. It builds off of the previous strategic plan created in 2009 and the progress made in recent years. The plan will guide the Library's decision making in the next five years.



Using the planning framework², the Committee and the Board of Managers, and the Management Team developed the plan including for each element, an overarching goal, high level strategies, and suggested tactics. In addition, metrics were identified for the Board of Managers and staff to monitor progress over time. The plan will act as the broad framework to support the prioritization of strategies and allocation and pursuit of resources to enact those strategies.

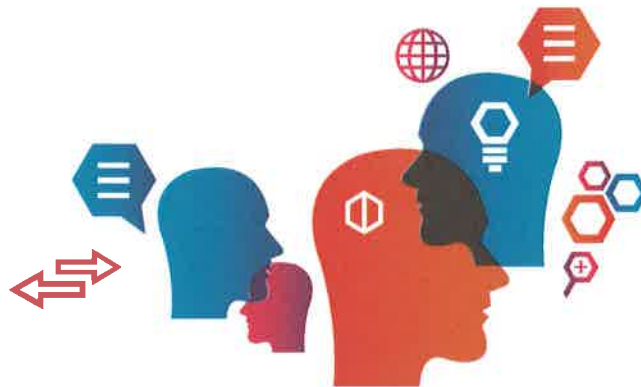
¹ The process is described in Appendix A.

² The planning framework is derived from the Nonprofit Strategic Management Framework developed by Fio Partners, LLC.

Ideas
People
Community

C O N N E C T I O N

Wallingford Public Library



Inspires

Enriches

Informs

MISSION



By offering a wide array of resources and experiences and by connecting people in our community with ideas and with each other, the Wallingford Public Library ensures every resident has the opportunity to be inspired, enriched, and informed.

VISION

- The Wallingford Public Library will be viewed as **the hub of the community** where all are welcome.
- The **collection will evolve to meet the changing needs and demographics** of our community, including the continued expansion of digital materials.
- Our programs will act as **opportunities to bring community members together** – to learn together, to support one another, and to be inspired.
- We will expand the array of supports for **access to online information and materials**, for both consumption and creation, and continue to be a go-to place for helping our community with technology.
- The **configuration of our facilities** will be assessed to best meet the needs of our patrons and to ensure the building's long term maintenance.
- As one of our strongest assets, our **staff will feel valued** and will have opportunities for professional development.
- Our Board of Managers will be a **committed, engaged group of community members**, representative of our diverse community.
- We will work in **collaboration with our community partners** to ensure our collective efforts address the needs of the community.
- The Library will foster a **strong sense of community identity**, spirit and pride through its collections, programs, facilities and other services.

VALUES

- **Access for All:** We provide equal access to our collections, programs, facilities and services.
- **Excellence:** We maintain high standards of customer service and strive for excellence in the services and resources we provide.
- **Respect:** We embrace people from all walks of life and treat individuals with respect and dignity.
- **Personal Growth:** We strive to provide all people with the opportunity to grow and achieve their life goals.
- **Kindness:** We show compassion and offer support to our patrons.
- **Innovation:** We actively seek out opportunities to blend new ideas and methods into our work.
- **Responsibility:** We offer high quality services in a safe, secure and fiscally responsible environment.



Goal 1: Our goal is to evolve the collection, programs, and types of services available to best meet the changing needs of our patrons.

STRATEGY #1: EXPAND THE VARIETY OF MATERIALS AVAILABLE IN THE COLLECTION

- Expand digital materials selection (eBooks, audiobooks, online databases)
- Continuously cull physical collection for damaged, overused, and outdated books and refresh materials in key segments
- Assess the relevance and usage of older media formats
- Research trends in new media and determine capacity of the Library to invest in new formats
- Expand collection of world language materials, including digital materials
- Explore opportunity to invest in and allow patrons to borrow technology devices as well as non-traditional materials

STRATEGY #2: IMPROVE LIBRARY PROGRAMS

- Develop an organization-wide cohesive framework for programming by constituency groups aligned with mission
 - Develop goals for programming including number and type of events and attendance
 - Develop signature, unique high-profile programs that can be branded and marketed widely
 - Continue collaboration with other organizations for program creation
 - Develop programs which may occur both within and outside of the Library
 - Develop an annual calendar for programming to support marketing efforts
- Develop measurable outcomes of quality and impact for programming and select methods of evaluation

STRATEGY #3: INCREASE AND EXPAND LIBRARY SERVICES

- Assess capacity for shifting or increasing hours of service
- Assess emerging technologies annually and develop support programs and services accordingly

- Provide classes on digital privacy and security to encourage digital safety practices among our patrons
- Provide classes on social media and other emerging technology topics to promote digital literacy in our community
- Select and organize online technology training resources
- Develop programs and services to support content creation
 - Offer a wide array of content-creation hardware and software
 - Engage creators-in-residence to help us offer content-creation learning opportunities
- Identify approaches and supports for patron self-service options (may include patron training, scripts and training for staff, visual guides)
- Identify methods and approaches to help the public utilize e-government services, at the state and local level
- Assess library card registration process and remove existing barriers
- Develop plans to add services for underserved constituencies (may include homebound residents, homeschooling families, English language learners, newcomers to our town, teens and tweens, 20s/30s, recent retirees, small business owners)

RELATIONSHIPS



Goal 2: The Wallingford Public Library will cultivate relationships with patrons, volunteers, key town officials, community partners, peer libraries, and the general public to increase the visibility of the Library to new and existing community members.

STRATEGY #1: STRENGTHEN MARKETING

- Develop an organization wide marketing plan with approaches for different segments of the community
 - Develop a profile of each segment (potential uses of the Library, needs, attributes, challenges)
 - Based on knowledge, develop appropriate messaging and select distribution channels that are targeted at different community segments (print, online, social media)
- Redesign the organization's branding and digital presence including logo, website, and collateral materials; launch new design
- Develop an organization wide communications plan with established timelines and selected channels

- Create new ways to communicate Library news on a regularly scheduled basis (e.g., email newsletters and e-blasts, printed newsletters and flyers, press releases)
- Identify other venues for marketing Library programs and services (e.g., public radio, community bulletin boards, Patch, e-calendars of other organizations)
- Create and implement a social media strategy (including policies, channels, roles, frequency, and content development)
- Develop marketing and promotional materials to support library card registration and membership in the Wallingford Public Library Association

STRATEGY #2: INCREASE PARTNERSHIPS

- Strengthen relationships with community and business leaders
- Deepen the partnership between WPL Staff and the Wallingford Public School system to assess and inform opportunities for new mutually supportive programs and services
- Cultivate relationships with library leaders across the state in order to share learning, to identify joint opportunities for programming and funding, and to keep pace with innovations in library services

STRATEGY #3: STRENGTHEN VOLUNTEER EXPERIENCE

- Develop a volunteer management plan including opportunity descriptions, skills required, application process, key policies and procedures, and expectations
- Develop online volunteer handbook capturing elements of the plan noted above
- Create a new volunteer orientation including safety and security procedures and an overview of library operations
- Assess satisfaction with and impact of our current Volunteer Appreciation event

STRATEGY #4: STRENGTHEN FUND DEVELOPMENT

- Investigate opportunities for receiving corporate grants and donations as well as foundation funding
- Recruit members for the Wallingford Public Library Association
- Reinvigorate efforts to create a planned giving program to ensure the long term financial stability of the Library
- Strengthen relationships with key town leaders to advocate for continued support from the Town of Wallingford

SUPPORTS & SAFEGUARDS



Goal 3: *By strengthening key organizational supports, including human resources, facilities, and risk management, the Wallingford Public Library will create a solid foundation for the provision of its programs and services.*

STRATEGY #1: STRENGTHEN HUMAN RESOURCES

- Determine competencies needed for each position and update job descriptions
- Evaluate staffing needs periodically, initially following implementation of automation
 - Identify peak service hours and schedule staff accordingly
- Create and implement an orientation program for new staff
- Strengthen performance management processes and supports for staff
 - Create and implement a performance appraisal process
 - Evaluate effectiveness of our current staff rewards/recognition programs
- Improve internal communication through the use of electronic communication channels and staff meeting scheduling
- Create a professional development program to ensure all staff have opportunities for continuous learning and to meet the competencies associated with their position, including opportunities for staff knowledge sharing
- Assess the need for additional human resources training and knowledge for the administrative staff
- Monitor staff climate on an ongoing basis and provide annual updates to the Board of Managers

STRATEGY #2: IMPROVE AND MAINTAIN FACILITIES

- Undertake an architectural review to determine methods to reconfigure and redesign current spaces within the Library to best meet community needs
 - Increase options for quiet study and/or small group meetings
- Conduct a study to determine feasibility of increasing safety in our main parking lot
- Develop a technology plan including new investments and a hardware/software refresh cycle to earmark funds accordingly
- Develop a facilities plan for all locations that includes strategies for general improvement, building restoration (where needed), and reconfiguration efforts
 - Develop a refresh cycle for furniture, décor, and equipment
 - Develop comprehensive preventive maintenance plan

- Assess current building security coverage and add additional security support as needed
- Continue to consider accessibility features at Yalesville branch

STRATEGY #3: STRENGTHEN RISK MANAGEMENT

- Develop and implement a comprehensive Emergency Preparedness Plan
- Establish internal financial management controls
- Review personnel policies and procedures from liability prevention perspective
- Maintain currency of Library Director knowledge of liability issues (personnel, financial, facilities, environmental)
- Ensure safe environment for staff and patrons
 - Implement staff injury prevention programs

QUALITY ASSURANCE



Goal 4: In order to fulfill our commitment to excellence, all services and programs at the Library will be monitored for customer satisfaction, quality, and impact on a regular basis.

STRATEGY #1: USE MEASUREMENT TO MONITOR EXCELLENCE AND IMPACT

- Create a plan and corresponding tools for measuring impact of programs on a regular basis
- Conduct community survey within three years and adjust strategic tactics as necessary based upon results
- Develop mechanisms for generating continuous user feedback in between major surveys
 - Create opportunities for “crowd-sourced” decisions to increase engagement
- Capture anecdotes and qualitative feedback more regularly and integrate feedback into marketing and fund development efforts

CULTIVATING LEADERSHIP



Goal 5: Our Board of Managers will be a committed, engaged group of community members, representative of our diverse community, and able to fulfill their roles as ambassadors for the organization in the community.

STRATEGY #1: IMPROVE NEW BOARD MEMBER EXPERIENCE

- Strengthen Board member recruitment and nominating efforts by creating a Board matrix, identifying gaps, and recruiting candidates
- Strengthen Board orientation including providing historical perspective of Library's evolution
- Create a mentoring program for new members

STRATEGY #2: EVOLVE BOARD TRAINING AND PLANNING

- Conduct periodic trainings for Board of Managers on shifting trends in the field of libraries, new technologies in library services, and fund development
- Develop annual goals for the Board of Managers in conjunction with the Strategic Plan and in coordination with the goals of the Library Director
- Conduct a Board self-assessment every two years to assess Board functioning

STRATEGY #3: MONITOR PROGRESS

- Create reporting tool for the Board of Managers to monitor key metrics on an on-going basis
- Monitor implementation of the plan through creation of an annual workplan for the Board of Managers and for staff leadership

KEY RESULTS

With the implementation of the strategic plan, the Wallingford Public Library will strive for the following measurable key results:

- Increase in registered library card holders
- Increase in Wallingford Public Library Association members and membership contributions
- Increase in engagement at the Library (program attendance, type, impact of)
- Increase in technology usage (computer labs, wireless network use)
- Increase in Library website usage and number of online supporters (email, Facebook, Twitter)
- Maintain a high level of organizational efficiency (cost per circulation at Main Library and Yalesville)
- Maintain a high level of patron satisfaction and customer service

APPENDIX A: CREATING THE STRATEGIC PLAN

The Long Range Planning Committee was established in April of 2013 and included:

- Abby Beale, Chair
- Deron Chang
- Christine Gingras
- Rev'd Canon Robert J. Miner
- Cliff Overstrum
- Susan Rhodes
- Dr. Julie Robison
- Dr. Cynara McPhail, President
- Jane Fisher, Library Director
- Amy Humphries, Assistant Library Director

The strategic planning process began with the design of the information base for planning. The design included a variety of opportunities for community members and users of the Library to provide feedback. The information base which was gathered from June – September 2013 included:

External Information Gathering

- A print and online community survey which received 850 responses, which was promoted via email, the Library website, local newspapers, and community partners
- Individual interviews with 5 stakeholders including patrons, Town officials, community leaders, and leaders of nonprofit organizations
- Focus groups with youth (12 attendees), staff (35 attendees)
- Comparable library information
- Research on the 21st Century Library and on trends in digital media
- Demographic information

Internal Analysis and Information Gathering

- Usage data
- Collection statistics
- Progress since last strategic plan

The information was presented to the Committee and to the Board of Managers as it was gathered. The Board of Managers held a retreat in late October to review the information and develop the plan which was adopted in January 2014.