

July 30, 2018

A. Objective

The Burlington Public Library (BPL) seeks a consultant to develop a comprehensive 3-5 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 a.m. September 14, 2018. Proposals should be addressed to Sarah Ward, Library Director, Burlington Public Library and emailed to blibrary@burlingtonwa.gov.

C. Inquiries

Inquiries must be made via email. Please address all inquiries to blibrary@burlingtonwa.gov. Telephone inquiries will not be addressed. Answers will be provided within 3 business days. All questions must be received no later than September 7, 2018.

D. Background

Burlington Public Library in Burlington, Washington (population 8,388) is located approximately 65 miles north of downtown Seattle in the Skagit Valley. The library's collection includes 48,337 items, with an annual circulation of over 142,000. There are 16 staff members (12 FTEs). The library is open 54 hours per week, year round. The annual budget is \$889,000, and the library is in sound financial shape due to a conscientious city administration and library board. The current library director started in July 2015 after the retirement of the previous director.

E. Scope of Work

BPL 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, and stakeholders—including library board and staff—to identify library needs and wants, as well as ways to increase library usage and cardholder registration.
 - a. Community input is a key component of this planning process and may include:
 - i. Focus groups/individual interviews/public input sessions
 - ii. Online survey
 - iii. Phone interviews
 - iv. Other methods as identified by the consultant

Please include suggestions for handling research in your proposal.

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3. Facilitate planning meetings and input sessions (public, board, and staff sessions).
4. Review the current mission statement and facilitate revisions, and create core values statement.
5. Identify service priorities, goals, objectives, and activities.
6. Write and present the strategic plan that will be communicated to the library's stakeholders.

The final deliverable shall include:

- a. An up-to-date community profile and identification of community markets.
 - b. An assessment of the library's environment, including evaluation of strengths and weaknesses, quality of services, reputation, management, and budget, etc.
 - c. Specification of the mission and core values of the organization.
 - d. Clearly defined priorities, goals, and objectives that are measureable and for which the library will hold itself accountable.
 - e. Specification of a built-in process of regular review, evaluation, and adjustments to the plan resulting from changes in the economic, demographic, or political climate.
7. All raw and summary data is to be delivered to BPL at the conclusion of the planning process.

F. Proposal Content Requirements

1. A cover letter providing a brief description of the firm or individual, including name, address, phone number, and email of principal contact person.
2. An 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 experience/expertise. 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.
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. Please note any part of the proposal that is beyond the expertise of the consultant, or would be better handled by 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. References and contact information for three (3) organizations for which the facilitator has provided strategic planning services. A public library would be preferred as one of the three references.

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G. RFP Standards and Selection Criteria

1. BPL 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 financial interest in this proposal.
3. In cases of disputes over differences of opinions as to the services of the proposal, the decision of BPL shall be final.
4. BPL 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 of more respondents.
5. BPL reserves the right to reject any or all responses to this RFP.
6. The proposal will be evaluated by BPL and will include the following criteria:
 - a. Responsiveness of the written proposal to the purpose and scope of the project.
 - b. Demonstrated knowledge, skills, and experience in conducting strategic planning projects for public libraries.
 - c. Methodology and timeline for carrying out tasks in the scope of the work.
 - d. Cost to complete the process.
 - e. Ability to meet deadlines in strategic and library planning; satisfactory performance record (references).

H. RFP and Planning Process Timeline

1. Proposals must be received via email before 10:00 a.m. September 14, 2018.
2. All questions must be submitted via email to blibrary@burlingtonwa.gov, and received no later than September 7, 2018.
3. The strategic planning process will begin no later than October 15, 2018.
4. The consultant will attend a BPL Staff Day in December 2018.
5. A draft report/plan and executive summary are to be submitted to the Library Director three (3) weeks in advance of the final deliverable date, no later than February 22, 2019
6. The strategic planning process will be completed no later than March 15, 2019.

Burlington Public Library
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burlingtonwa.gov/library