

**Request for Proposal
Strategic Planning
Mooresville Public Library
Mooresville, Indiana**

Introduction

Mooresville Public Library (MPL) of Mooresville, IN seeks a consultant to develop a comprehensive strategic plan for the library. Specifically, the Board of Trustees expects a service plan that includes goals, measurable objectives, and proposed activities to meet community needs for the next three to five years. The plan should also address the implications of the proposed goals for the library's collections, technology, staffing and facilities. This plan will examine our community's growth patterns and demographics, and identify the need for service with respect to future trends and technologies. It will also identify possible funding needs to respond to service demands. The purpose of the strategic plan is to position the library to proactively provide service that meets changing needs in a cost-effective manner, and to educate stakeholders about library services.

Library Background

MPL is located in Morgan County. MPL has one 24,500 square foot central library serving the 13,491/12,973 residents of Mooresville and Brown. The area has a solid commercial and individual tax base, excellent schools, and many other amenities.

MPL's current (2017) operating budget is \$872,720 with a staff of 16; 6 full-time employees and 12 part-time employees, one part-time facility's manager, and one high school student who serve as pages. On staff, there are five [5] Masters of Librarian Science librarians, one [1] Juris Doctorate JD, one [1] Masters of Education, two [2] holding Bachelor degrees and one with an Associate's. Continuing education is encouraged and supported by the Board of Trustees for all MPL employees.

MPL's facility is open 59 hours per week (Monday-Saturday). In 2015, 6,578 registered borrowers checked out 158,828 items and staff presented 820 programs with an attendance of 35,084. There are 39 public access computers with Internet connections, and we currently hold 73,773 items in our collections.

Financial Circumstances

The Mooresville Public Library is an independent taxing unit of local government funded primarily through various tax revenues approximately (97%), with a small portion (3%) from fines and fees, investment income, and other miscellaneous revenue sources. The State of Indiana is currently looking closely at funding mechanisms for all types of local government, including libraries.

Current Planning Issues

The most recent strategic planning document was developed in 2011. MPL needs to develop a new strategic plan to guide service development and resource allocation to reflect the needs of our dynamic, growing community in a time when budgets are static and new technologies are changing service demands and delivery models.

Project Description

Mooresville Public Library is seeking a professional library consultant to:

- Facilitate the strategic planning process using a methodology effective for public libraries.
- Design an effective method for data gathering and presentation, which may be limited to surveys or may include focus groups and community meetings to identify needs over the next five year period.
- Facilitate meetings of the planning committee(s).
- Assist in the identification of service priorities, goals, objectives and activities.
- Assist in identifying gaps where the current library operation is insufficient to meet the identified service priorities.

Through this process, MPL expects to have a Strategic Plan in place by December 2017 that will guide the activity and use of resources over the next three to five years. The process should ensure input from a wide range of stakeholders and the plan should reflect that input and idea generation.

Scope of Work

The consultant will assist the Board of Trustees and staff of MPL in:

- A statement of community needs and goals.
- Measurable objectives and services responses to the community needs and goals.
- An assessment of facilities, services, technology, and operations.
- An ongoing annual evaluation process.
- Financial resources and sustainability.
- Collaboration with other community partners.
- A professional development strategy.
- Determining current use and projecting future demand as affected by:
 - Community needs and the opportunities they offer.
 - Future trends in technology.
 - Trends affecting the future of public libraries in general.
 - Community organizations that either supplement or complement library services.
- Determining the type of data to be collected, and the appropriate measurement standards to ensure its usefulness in decision-making.
- Collecting, reviewing and analyzing data and making recommendations based on the data.
- Evaluating delivery approaches including design, planning, programming, promoting/marketing of library services, physical plant, fiscal policies and staffing.
- Prioritizing current services and new services that will address the service priorities for the next five years.
- Identifying strategies to build organizational capacity for addressing community needs.

The consultant will be required to:

- Contribute substantively both orally and in writing to the Library's decision-making process.
- Facilitate planning meetings and public input sessions.
- Meet with groups and stakeholders.
- Work closely with designated staff on tasks related to the strategic planning project.

Proposed Activities

Activities related to the proposed strategic plan should include, but not be limited to the following:

- Ongoing meetings with the Board of Trustees, library director and staff, and strategic planning team. Initial meeting should include a discussion of roles and responsibilities of the consultant, the work to be completed, and the projected timetable/schedule for completion.
- Assist with the development of the stakeholder list identifying individuals and groups that should have input in addition to the Library Board and staff.
- Assist the library in developing a plan to obtain community input.
- Meet with key stakeholders and groups.
- Review and analyze existing data provided by MPL.
- Assist the staff and board with the development of the mission [statement] that reflects current and future goals of the Library.
- Assist the staff with development of the vision [statement] and action plan that responds to assessment analysis.
- Assist MPL in identifying services that will best address new service priorities.
- Develop quantitative performance measures.
- Develop a strategic planning document that reflects that process.

Project Timeline

It is anticipated that the project can begin in **May 2017**, and be fully completed by the end of **November 2017**.

Selection Criteria:

MPL reserves the right to select a planning consultant based directly on the proposal or to negotiate further with one or more respondents.

MPL reserves the right to reject any and all proposals.

The proposal will be evaluated by MPL and the highest ranking vendor(s) may be asked to make formal presentations to the Library board and administration. Evaluation of the proposals will include but not be limited to the following criteria:

- Relevant and positive experience and success in library planning.
- Cost to complete the process. Please itemize costs in relation to the Preparation Stage, Information Gathering Stage, and the Design Stage.
- Ability to meet deadlines and operate within budget.
- Prior experience in working with both public and staff committees.

If invited for an in-person presentation following your written submission, your presentation should include physical and/or electronic samples of your work for other institutions to show the format you would provide for the final product. Presentation should be no longer than 20 minutes in duration and will be followed by questions from MPL Trustees and designated staff.

Proposal Content Requirements

Respondents shall have:

- A cover letter providing a brief description of the firm or individual, name, address of consultant, telephone number, e-mail, and fax of principal contact person.
- Executive summary of the highlights of the proposal, which should not exceed one page in length, but convey the consultant's understanding of the purpose and expected outcomes of the project.
- A list of key personnel who would be involved in the process and their expertise/experience.
- A summary of the consultant's qualifications and experience. Professional degrees in library and information science as well as experience in the administration of libraries are desirable. Successful firms and their subcontractors will have demonstrated expertise in library operations, technology and facilities. Evidence of successful experience in planning is crucial to the selection.
- A work plan that includes a description of the methodology, tasks, timeline, and estimated amount of time that would be spent on the project.
- 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.
- A schedule of costs for providing planning services, including supplies, number of onsite visits and cost per trip, data gathering and analysis, and other costs associated with the planning process.
- References of and contact information for at least three (3) previous public libraries for which consultant has provided strategic planning service.
- Additional Documentation - Consultants are welcome to provide additional documentation that will assist MPL in the selection process.

RFP Standards

- MPL will not reimburse costs of preparing the consultant proposals.
- MPL 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 and mailing of the proposal.
- MPL reserves the right to reject any or all responses to this Request for Proposal.
- No Library board or staff member shall have a financial interest in this proposal.
- In cases of disputes over differences of opinions as to the services in the proposal, the decision of MPL shall be final.
- MPL reserves the right to ask for clarification in the proposal if the need arises.

RFP Availability:

This RFP will be posted on MPL's website: www.moorevillelib.org

And will be sent to the Library Consultants Directory: <http://www.libraryconsultants.org/>

In addition, the RFP may be distributed to individual consultants.

Questions should be submitted in writing to:

Diane Huerkamp, Director
 Mooresville Public Library
 220 West Harrison Street
 Mooresville, IN 46158
 Fax: (317) 317-7383
 Email: dianeh@mooreville.lib.in.us

Please submit any questions by March 31, 2017.

Respondents must submit the original and one unbound copy of the proposal in writing by April 10, 2017 to:

Diane Huerkamp, Director
 Mooresville Public Library
 220 West Harrison Street
 Mooresville, IN 46158

Proposals must be received in a sealed package appropriately marked with the proposal title and name and address of the respondent by 4:00 p.m. ET on Friday, February 28, 2010. All proposals not received by that date will be returned unopened. The library director will notify the consultants chosen for further consideration within 30 days after the proposal deadline, and will notify all respondents in writing of the outcome of their proposal within 30 days after the final decision is made.