

Allen County Public Library

Request for Proposal

Consultant Services: Strategic Planning

Submission Date/Time:

March 17, 2017

5:00 PM EDT

Allen County Public Library
Greta K. Southard, Library Director
900 Library Plaza
Fort Wayne, IN 46802

Overview

The Allen County Public Library seeks proposals from qualified consulting firms to prepare for and facilitate a strategic planning process. This process will include an assessment of the needs of the community, including current library users and non-users, as well as other stakeholders such as local government entities and community organizations. The development of a strategic plan will support re-envisioning the Library's core services, as well as identify community needs which the Library is well, and uniquely, suited to fill, and will be based on the community outcomes which the Library hopes to influence.

Library Background

The Allen County Public Library (ACPL) serves the city of Fort Wayne IN as well as the entire county whose population is over 356,000 residents and 304,839 library cardholders. Allen County's demographics are evolving, with more diversity and a changing age structure. Urban residential and employment growth are prevalent with hundreds of millions of dollars in new investments in downtown Fort Wayne in the past decade. New projects on the horizon include development of the river front, a boutique hotel, mixed-use, office, retail, and residential structures.

Fort Wayne and Allen County residents have been served by the ACPL and its thirteen branches since its founding in 1895 as the Fort Wayne Public Library. The entire library system began an \$84.1 million overhaul of its branches in 2002, finishing work by 2007. The centerpiece, the Main Library Branch, now covers 367,000 square feet, featuring an art gallery, underground parking garage, café, and community auditorium. In 2016, 13,311,490 materials were borrowed by patrons, and 2,512,375 visits were made throughout the library system. The Fred J. Reynolds Historical Genealogy Department, located in the Main Library Branch, is the largest public genealogy department in the United States, home to more than 485,013 printed volumes and 661,333 items of microfilm and microfiche. The Convention and Visitors Bureau continues to name the ACPL as one of the top tourist attractions in Northeast Indiana.

In 2009, the Lincoln Financial Foundation gave the collection from the Lincoln Museum of Fort Wayne, valued at over \$20 million to the State of Indiana. In turn, the State selected the ACPL to house and curate the two dimensional objects and the Indiana State Museum for the three dimensional objects. The research collection, entitled the "Lincoln Collection in Indiana", is now housed at the ACPL. This collection is considered an incomparable repository and resource for information on the life and legacy of Abraham Lincoln. It is being digitized to further extend its use by authors, scholars, TV producers, educators, students, Lincoln enthusiasts, and the general public.

ACPL also houses a maker lab at the Main Library Branch and smaller maker lab installations and three dimensional printing at several branches. While not on the bleeding edge, the

Library provides more one-on-one technology assistance rather than class-room instruction to the public. The Library partners with community groups (Literacy Alliance) in providing technology classroom space for their class-room based technology training and GED instruction.

The Library is fortunate to have support from the ACPL Foundation, the Friends of the Library, and the Friends of the Lincoln Collection.

Project Description

The ACPL is approaching this strategic planning activity with an eye toward outcomes – the positive changes in the community the Library hope to influence. In addition to helping the Library establish mission and vision statements and set service priorities, the strategic plan should also describe why those priorities are important in terms of specific community outcomes. The planning process and ultimate plan, will support the re-envisioning of core services, as well as identify community needs which the Library is well and uniquely suited to fill.

This project will require the following work:

1. Collaborate and communicate with the Strategic Planning team or designated members at all points of the process, conducting status meetings in person or by telephone (or Skype) on a monthly or more frequent basis as requested by the designated library staff, and providing written progress reports outlining the work accomplished on a regular basis (schedule to be determined by the successful respondent and staff; a minimum of monthly for Library Board meetings).
2. Recommend methodology for and conduct a survey of community needs as they relate to public library service:
Findings from the process may include:
 - How current customers use the Library;
 - Why non-customers do not use the library;
 - Input from Friends, Foundation, and Friends of the Lincoln Collection;
 - How well the Library is currently meeting the community's needs for library service;
 - Conditions in the community that reveal areas in which the Library can have a positive impact (possibilities include job readiness/job skills development, participation in neighborhood associations and/or civic organizations, reading proficiency, early learning readiness, new business startups, households in which English is not spoken, rate of community aging, etc.).

3. Facilitate additional information gathering with Library Board members, library administration, library staff, library customers, local government officials, and other key stakeholders to collect data, input, ideas, and reactions.
4. In conjunction with Strategic Planning team, analyze, review and assess current Library services and programs, focusing on community needs, trends in technology, and trends in library service, and community organizations that supplement, support, and complement library services in Allen County.
5. Identify conditions in the community that indicate a current or potential need which the Library may be well positioned to fill.
6. Work in partnership with the Strategic Planning team, Library Board members, Library administration, and Library staff to facilitate work sessions to set priorities and identify long-term outcomes.
7. Develop a Strategic Plan document that encompasses the Library’s mission, vision and values, and outlines goals and objectives for the Library.

Deliverables will include:

- Analysis of stakeholder groups, focus groups, public feedback/comments, and survey results;
- Analysis of projected trends and service models in library service and the Library’s ability to capitalize on them;
- Revised/refreshed mission and vision statements;
- A strategic planning document that reflects service priorities in the short-term (one to three years) for the ACPL, as well as potential longer-term (three to five year) needs;
- Executive Summary of Strategic Planning Document.

Draft Project Timeline

March 17, 2017	Proposals due no later than 5:00 p.m. EDT
March 23, 2017	Presentation(s) to Library Board & administration by finalists
April 2017	<ul style="list-style-type: none"> • Planning meetings with Library administration and Strategic Planning team • Information gathering
May - June 2017	<ul style="list-style-type: none"> • Community survey • Focus groups with public, community groups

	<ul style="list-style-type: none"> • Meetings with staff, Library Board
June 2017	<ul style="list-style-type: none"> • Identify desired long-term outcomes • Develop core services and target service areas
July 2017	Flesh out goals and objectives
August 2017	Approval of strategic plan by Library Board
September 2017	Plan takes effect via reflection/inclusion of identified components in 2018 proposed library budget

NOTE: This is a draft timeline. The Library reserves the right to deviate from this schedule.

Proposal Requirements

Questions regarding this RFP are to be submitted in writing by 12:00 p.m. Monday, March 6, 2017 or by fax or email to:

Greta K. Southard
gsouthard@acpl.info
 fax: 260.421.1386

Responses to questions will be compiled and posted in the form of an addendum on the Library’s website www.acpl.info/consultantrfp by 5:00 p.m. on Tuesday, March 7, 2017.

Each proposal must include the following:

- _____ A **cover letter** providing a description of the respondent, including the name and address of the vendor submitting the proposal, and the name, address, telephone number and email address of the person who will serve as the vendor’s principal contact.
- _____ An **executive summary** of the highlights of the proposal which should not exceed one page in length and summarizes the benefits of the proposal to the ACPL.
- _____ A **summary of qualifications** for the respondent which includes recent and relevant experience. Specifically, please include experience with similar work in public libraries over the last three (3) years.
- _____ A **list of key personnel** who would be associated with the proposal. For each person listed include the relationship with the respondent, including current job title and

employment history with the respondent. Include the type and length of any relevant experience.

_____ A **description of the process** to be used in meeting the requirements of this RFP.

_____ A **work plan** that includes description of the methodology, timeline, and estimate of the amount of time and cost for each component of the project, and the amount of data required to provide statically valid information for this population. The timeline should demonstrate that the work will be completed within no more than one hundred fifty (150) days of the execution of the signed contracts. Alternate timelines may be considered with appropriate rational as it pertains to the gathering of information and Library Board deadlines.

_____ **References** of a minimum of three (3) previous clients in the area of strategic planning and permission to contact them. For each reference, include the library (or company) name, contact name, contact phone number, the type of work done and the scope of the project.

_____ **Pricing** by phase and/or project component, including any optional aspects of the proposal. Include all supplies, travel time, mileage, and other costs associated with the project (i.e. telephone vs. mailer vs. online survey; survey vs. focus groups; etc.). Progress payments will be allowed over the time of the work.

_____ Any possible optional **alternates** for gathering data, including the rational for need, the desired benefit and a description of the proposed instrument.

_____ The completed and signed **Proposal Form** included at the end of this RFP.

_____ **Eight (8) complete copies** of the proposal and one electronic copy.

NOTE: A proposal missing any component of the deliverables listed above may be disqualified or have points deducted in the evaluation process.

Evaluation Process

Proposal Review Schedule

- Questions regarding the RFP will be accepted in writing through 12:00 PM EDT on Monday, March 6, 2017.
- Responses to questions and any addenda will be posted on the Library's website by 5:00 PM EDT Tuesday, March 7, 2017.
- Proposals are due no later than 5:00 PM EDT Friday, March 17, 2017.
- The finalist may be invited to make a brief presentation to the Library Board at their regular meeting on Thursday, March 23, 2017.
- A contract will be awarded by March 31, 2017.

- The Library reserves the right to deviate from this schedule.

Rating Criteria

Comparison of proposals is a subjective process requiring evaluation of multiple factors including price, accuracy, quality and completeness of the proposals, references, recommendations, and input from third parties. The following qualifications will be considered by the Library:

1. The ability, capacity, and skill of the respondent to perform the contract or provide the service required.
2. Whether the respondent can perform the contract or provide service promptly, or within the time specified, without delay or interference.
3. The character, integrity, reputation, judgement, experience, and efficiency of the respondent.
4. The quality of performance of pervious contracts or services.
5. The sufficiency of the financial resources and ability of the respondent to perform the contact or provide the service.
6. The quality, availability, and adaptability of contractual services to the particular use required.
7. The respondent’s record of experience in this field of endeavor, especially as it relates to the size and scope required in the proposals specifications.

Specific criteria that will be used when evaluating proposal for this project include:

Experience, including references <ul style="list-style-type: none"> • With strategic planning references • With public libraries • With facilitating work groups, both staff and public 	35%
Cost	45%
Proposal Quality <ul style="list-style-type: none"> • Completeness • Organization • Attention to the project description • Proposed work plan 	20%

The Library may select one or more top-scoring proposal for further evaluation. This phase of the evaluation will be comprised of brief in-person presentations to the Library Board and senior management team, and interviews with references.

The contract will be awarded to the respondent determined by the ACPL to be in the best interest of the Library, and who best meets or exceeds the Library's criteria. The Library reserves the right to reject any or all proposals or to waive any details in proposals received whenever such rejection or waiver is in the best interest of the Library. The Library also reserves the right to reject the RFP of a respondent who has previously failed to satisfactorily perform, has not completed contracts on time, or whom, upon investigation shows is not in a position to perform the contract.

Request for Proposal Standards

Cost of preparation. Costs incurred in the preparation of a response to this Request for Proposal are the responsibility of the respondent and will not be reimbursed by the ACPL.

Cancellation. The ACPL reserves the right to cancel award of the contract any time before execution of the contract by both parties if cancellation is deemed to be in the Library's best interest. In no event shall the Library have any liability for the cancellation of award. The respondent assumes the sole risk and responsibility for all expenses connected with the preparation of this proposal. ACPL reserves the right to reject any or all responses to this Request for Proposals.

Assignment. Neither the resultant contract nor any of the requirements, rights, or privileges demanded by it may be sold, assigned, contracted, or transferred by the respondent without the express written consent of the Library.

Clarification of Responses. The Library reserves the right to obtain clarification of any point in a respondent's proposal or to obtain additional information necessary to properly evaluate a particular proposal. Failure to respond to such a request from the Library or its agent for additional information or clarification could result in rejection of that proposal.

The RFP will be posted on the ACPL website: – www.acpl.info/consultantrfp posted to Library Consultants Directory <http://www.libraryconsultants.org/> and distributed to individual consultants.