

ATTACHMENT E

STRATEGIC PLAN RFP APPROVAL

We received seven strategic plan proposals in response to the RFP. After carefully reviewing each proposal, I suggest that we approve the proposal from Measurement Resources Company.

THEREFORE BE IT RESOLVED that Elmhurst Public Library accepts the proposal for strategic planning services from Measurement Resources Company for a cost of \$45,250.00. There may be other expenses for travel or contingency with the total cost not to exceed \$50,000.00.

Submitted RFPs

Company	Cost
• Fast Forward Libraries	\$22,500
• ReThinking Libraries	\$21,800
• Measurement Resources	\$42,250
• Sarah Keister Armstrong & Associates	\$20,500
• Win Together	\$55,100
• Essentiam	\$33,500
• Knowledge Strategies	\$90,000

Summary of Key Points for Measurement Resources Company Proposal:

- Measurement Resources Company (MRC) is a woman-owned national research and evaluation firm headquartered in Central Ohio. MRC has partnered with government, nonprofits, and community collaboratives for over 12 years. (pg. 2)
- MRC has partnered with Elaina Norlin, DE&I Consultant, to emphasize diversity, equity and inclusion. (pg. 2)
- MRC has proposed a collaborative work plan to develop a comprehensive, data-driven, strategic plan. MRC's proposed work plan is based on community engagement research and collaborative strategic planning. (pg. 3)
- A six-person professional research team plus support staff will be utilized to complete the project. (pg. 4)
- **Team Members: (pg. 4)**
 - ✓ Elaina Norlin, MLIS, DE&I and library management consultant – Lead Library Planning, DE&I Expert and Co-Facilitator
 - ✓ Eliza Gardiner, PhD, senior research associate – Project Manager, Lead Qualitative Researcher and Co-Facilitator
 - ✓ Alyssa Petty, MA, director of research and analytics – Lead Quantitative Researcher
 - ✓ Harley Vassler, MS, research analyst – Quantitative Researcher
 - ✓ Erica Duncan, LSW, – Research Assistant
 - ✓ Sara Parker, communications director – Communications and Report Design
- Deliverables & Methodology (pg. 8)
 1. Define the Current State, conduct SWOT analysis
 2. Explore the Desired Future State: Defining Strategic Vision & Focus Areas

3. Create the Action Plan: Planning and Alignment of Systems
 4. Design the Final 5 Year Strategic Plan
- Current State Report & Methodology (pg. 8-9)
 1. Key Stakeholder and Community Survey
 2. Stakeholder Interviews and Focus Groups
 3. Document & Data Review
 - Proposed Timeline: (pg. 10)
 - ✓ Kick-off meeting – January 2022
 - ✓ Development of Staff & Stakeholder Survey and Focus Group protocol draft – February 2022
 - ✓ Current State Data Collection – by June 1, 2022
 - ✓ Strategic Planning Facilitated Meeting with committee and staff – by June 30, 2022
 - ✓ Staff/program Area Meetings held in July 2022
 - ✓ Document Draft Review – by September 1, 2022
 - ✓ Final Document presented – October 2022



**Measurement
Resources**

Measurement moves missions

Strategic Plan Development Services

Elmhurst Public Library

REQUEST FOR PROPOSAL

September 8, 2021

All communication regarding this RFP should be submitted to:

Sheri Chaney Jones, President
Measurement Resources Company
1480 Manning Parkway Suite A,
Powell, Ohio 43065
614.947.8899 (phone)
scjones@measurementresourcesco.com

1. Cover Letter

Measurement Resources Company (MRC) is pleased to submit this proposal to work collaboratively with the Elmhurst Public Library to develop a comprehensive, data-driven, three- or five-year strategic plan. MRC is a woman-owned national research and evaluation firm headquartered in Central Ohio. For over 12 years, MRC has partnered with government, nonprofits, and community collaboratives to help them use systems thinking, research, and measurement best practices to accelerate social change. MRC has previous experience with public organizations to help them organize and engage their stakeholders, establish a clear and compelling vision, and identify strategic issues, goals, and strategies. We specialize in data-driven strategy and planning; community-based needs assessments; program and impact evaluation; secondary data collection and analysis; stakeholder and community research engagement; design and implementation of performance measurement and outcome systems; and predictive analytics. Through these data-driven approaches, MRC works cooperatively with clients and their community partners to improve their efficiency and effectiveness in comprehensively meeting community needs, so that they can achieve better, more sustainable outcomes.

To ensure the strategic planning process is effective for Elmhurst Public Library and emphasizes Diversity, Equity, and Inclusion (DEI), MRC has partnered with Elaina Norlin, MLIS. Ms. Norlin has over 20 years' library systems experience in a variety of settings (i.e., academic, corporate, federal, special) and roles (i.e., executive director, grants officer, DE&I coordinator, librarian). As a DE&I consultant for libraries, Ms. Norlin works with organizations to clarify DE&I-related goals and strategic actions. As the Executive Director for the African American Research Library, Ms. Norlin led her team in tripling the library's program attendance in just two years.

MRC's team has proven experience developing measurable strategic plans and conducting community engagement for statewide and local organizations across the United States and Canada. We are experts in gathering and analyzing the most relevant data and information, coupling that with strategic community engagement initiatives, change management and implementation science. All of our strategic planning projects have required us to use design thinking, apply diversity and equity lenses, collect, and analyze primary and secondary data, and present findings to leadership teams, boards, staff, and other community stakeholders. MRC has recently conducted strategic planning for developing collaborative and data-driven paths forward for Project BRAVO El Paso Community Action Program, Art Possible Ohio, Charitable Pharmacy of Central Ohio, City of Columbus – Columbus Public Health, Community Shelter Board, Delaware County, Ohio – Delaware Area Transit Authority, Franklin County, Ohio – Veterans Service Commission, Knox County, Ohio – District Board of Health, Ohio Alliance for Arts Education, Ohio Arts Council, State of Ohio Department of Mental Health and Addiction Services, State of Ohio Department of Aging, The Troy Foundation, and St. Vincent Family Services.

Whether working with statewide, regional, or hyperlocal organizations, MRC utilizes a mixed-methods approach as part of its strategic planning process, which combines stakeholder engagement, primary data collection through focus groups, surveys, and interviews, and collection and analysis of up-to-date publicly (and sometimes privately) available data. All quantitative and qualitative data are analyzed using racial, gender and geographical (urban, rural, and suburban) lenses. MRC has directly served more than 200 government and nonprofit organizations and initiatives. Our full client list can be viewed here:

<https://measurementresourcesco.com/client-list/>

Thank you for the consideration to work on this project. We look forward to hearing from you.

Respectfully submitted,



Sheri Chaney Jones, President, Measurement Resources Company

1480 Manning Parkway Suite A, Powell, Ohio 43065

Tel. 614-947-8899

Email. scjones@measurementresourcesco.com

Website. <https://measurementresourcesco.com/>

2. Executive Summary

Measurement Resources Company's (MRC) proposes a collaborative work plan to develop a comprehensive, data-driven, three- or five-year strategic plan for the Elmhurst Public Library. MRC's proposed work plan is based on community engagement research and collaborative strategic planning, made successful by the project teams' range in expertise.

All MRC associates have extensive experience in developing data-driven strategic plans. MRC will utilize the skills and talents of a six-person professional research team plus our support staff to complete this project work, including:

- Elaina Norlin, MLIS, who will serve as Co-Facilitator, and Library Planning and Diversity, Equity, and Inclusion (DEI) Expert.
- Eliza Gardiner, PhD, who will serve as a Project Manager, Co-Facilitator, and Lead Qualitative Researcher, contributing her expertise in strategic planning, community engagement, and intercultural communication.
- Alyssa Pettey, MA, who is Director of Research and Analytics with MRC and will oversee quantitative primary and secondary data collection and analysis.
- MRC's Research Analyst, Research Assistant, and Communications Director

MRC specializes in community-based, data-driven collaboration for systems planning. Our approach combines the best practices of collective impact, appreciative inquiry, systems design thinking, diversity, equity, inclusion, change management, and needs assessment prioritization. MRC has a proven methodology for engaging the voices of community members through online surveys and virtual focus groups/interviews. Most recently, MRC's community engagement strategy resulted in 8,321 valid online community survey responses and 234 virtual focus group community participants for The Health Collaborative's Community Health Needs Assessment.

Facilitated by MRC, Elmhurst Public Library's leadership and staff will undergo a strategic planning process that will result in a clear, compelling future vision along with a winning proposition. This proposition will clearly identify what is unique about the Elmhurst Public Library, how it achieves its mission, and how it meets the needs of the community it serves. MRC's proposed work plan includes the below Project Deliverables:

1. Current State Report, including a SWOT analysis of Elmhurst Public Library, informed by the community focus groups/interviews, stakeholder surveys, and a review of internal and external secondary data. (January–April 2022)
2. Leadership Strategic Planning Facilitated Meeting to review the Current State Report; review and/or refine the Elmhurst Public Library's vision, mission, and create core values statements; and establish three- or five-year vision and strategic focus areas. (May–June 2022)
3. Facilitated meetings with staff to develop their action plans that align with the three- or five-year vision and strategic focus areas. (July 2022)
4. Final Strategic Planning Document that will include Three- or Five-Year Strategic Vision, Strategic Focus Areas, and department areas' action plans, including recommendations for ongoing measurement and implementation of the strategic planning efforts. (October 2022)

PROPOSAL HIGHLIGHTS

Project Team's Expertise
Collaborative Strategic Planning
SWOT Analysis
Quantitative Data Analysis
Qualitative Data Analysis
Representative Community Engagement
DE&I Lens Application
Library Management/Planning
Outcome Measurement

Work Plan

1. Define the Current State, with SWOT Analysis
2. Explore the Desired Future State: Defining Strategic Vision & Focus Areas
3. Create the Action Plan: Planning & Alignment of Systems
4. Design and Present the Final Strategic Plan Report

Community Engagement

Collaborating with the Library, local leaders, and advocates to:

1. Identify participants for 15 focus groups/interviews
2. Distribute online community survey
3. Distribute online staff/stakeholder survey

Hours & Project Fees

MRC is not to exceed final total project costs of \$45,250, estimated to cover 300 work hours.

3. Project Team

Measurement Resources Company (MRC) will utilize the skills and talents of a six-person professional research team plus our support staff to complete this project. The staffing plan includes one DE&I and library planning consultant, one Project Manager, three researchers, one research assistant, and one communications director. **All MRC associates have extensive experience in developing data-driven strategic plans.** Each team member will have specific roles assigned to this project and will take a collaborative approach to ensure the highest quality results. We will hold regular internal project meetings to enhance communication in order to align all activities between data collection, community engagement, meeting facilitation, data analysis, strategy, measurement development, and reporting. This will ensure successful project completion, even if one of the team members suddenly becomes unavailable for any reason. If one member becomes unavailable to complete the work, MRC is committed to reassign activities to one of our other qualified researchers and/or hire additional team members to fill any vacant position.

Project team members and their roles on this project:

- **Elaina Norlin, MLIS**, DE&I and library management consultant—**Lead Library Planning, DE&I Expert and Co-Facilitator**
- **Eliza Gardiner, PhD**, senior research associate, Measurement Resources Company—**Project Manager, Lead Qualitative Researcher and Co-Facilitator**
- **Alyssa Petty, MA**, director of research and analytics, Measurement Resources Company—**Lead Quantitative Researcher**
- **Harley Vassler, MS**, research analyst, Measurement Resources Company—**Quantitative Researcher**
- **Erica Duncan, LSW**, research assistant, Measurement Resources Company—**Research Assistant**
- **Sara Parker**, communications director, Measurement Resources Company—**Communications and Report Design**

Team Members' Experience and Expertise (Resumes provided in Appendix A)

Elaina Norlin, MLIS, will serve as the project team's Lead Library Planning, DE&I consultant, and Co-Facilitator. Having earned her Master's in library sciences from the University of Illinois, Ms. Norlin has over 20 years' experience in library management and services. Ms. Norlin will ensure the strategic planning process is suited to meet the needs of a public library looking to prioritize Diversity, Equity, and Inclusion (DE&I). Ms. Norlin's expertise includes leading discussions around DE&I, particularly within the context of library management and planning.

Ms. Norlin's career in library management spans over 20 years in a variety of settings (i.e., academic, corporate, federal, special) and roles (i.e., executive director, grants officer, librarian). From 2009–2019 she was the Executive Director for the African American Research Library/Regional Manager for the Broward County Library System. This dual position allowed her the unique experience to lead a 60,000-square-foot facility with over 50 employees and serve as a regional manager for six additional public library branches throughout Broward County, Florida. The public library branches in the region supported culturally and ethnically diverse populations, as well as community members, whose socioeconomic status ranged from low-income and working families to high-income retirees. Highlights of Ms. Norlin's tenure as Executive Director include:

- Raised over \$50,000 for the 10th annual fundraiser.
- Solicited over \$400,000 dollars through corporate and individual donations.
- Increased libraries' door count by 30% over five years.
- Created several award-winning exhibits and yearlong programs by combining digital humanities and technology to inspire and expand our community outreach.
- Worked on large-scale facilitation projects including strategic visioning, inclusive leadership, community engagement, affordable housing strategies and cultural sensitivity training.

At the Institute of Museum and Library Services, Ms. Norlin also built program capacity by developing key partnerships, and delivering educational presentations as the Institute's Senior Grant Program Officer. Furthermore, as a librarian at The University of Arizona Library, Ms. Norlin's expertise is made evident through her receiving of early academic library tenure (four years instead of six years) and her two-year position as Chair of the Strategic Library Planning Committee. As the Executive Director for the African American Research Library, Ms. Nolin led her team in tripling the library's program attendance in just two years. Ms. Norlin has also made significant contributions to library sciences literature (see Appendix A).

As a DE&I consultant for libraries, Ms. Norlin works with organizations to become crystal clear in regard to their DE&I-related goals and strategic actions. Each DE&I consulting experience is different because every organization has a unique workplace culture and community they serve. Some of the research for Ms. Norlin's consulting practices can be found in her new American Library Association's book: *Six Steps for Library Worker Engagement* (July 2021).

Eliza Gardiner, PhD, Senior Research Associate with MRC, will serve as a **Project Manager** and **Lead Qualitative Researcher** for this project. Ms. Gardiner will oversee community engagement and primary data (e.g., stakeholder surveys, community focus groups, and key stakeholder interviews) collection and analysis. As project manager, Ms. Gardiner will also oversee strategic planning meetings with Elmhurst Library stakeholders, and creation of the final strategic plan.

Ms. Gardiner has worked extensively with public agencies, non-profit organizations, and social enterprises to develop and implement strategic plans that guide organizations to accomplish their three- or five-year strategic visions. Her experience includes conducting current state analyses to identify strengths, weaknesses, opportunities, and threats (SWOT) to identify recommendations for improvement, while considering the context and culture of each organization. Ms. Gardiner has served as MRC's lead strategic planning consultant to a range of state-wide and localized public-serving organizations, such as Mental Health America of Ohio, The Troy Foundation, and United Way Knox County.

Ms. Gardiner also has expertise in community engagement, working extensively with diverse communities to assess community needs and to drive social change. Most recently, she served as the Lead Qualitative Researcher for The Health Collaborative's Community Health Needs Assessment in which she coordinated community engagement efforts across a 25-county region in southern Ohio, northern Kentucky, southeastern Indiana. Her leadership resulted in the collection of diverse community voices through 40 virtual focus groups and 24 phone interviews. Focus groups successfully engaged hard-to-reach community members, such as ethnic minorities of the region (i.e., Black, Asian, Hispanic, African immigrants), rural communities, low-income residents, community members with disabilities, veterans, youth, young adults, and older adults.

Ms. Gardiner joined MRC in 2018 and brings 12 years of collective professional and research-based experience in working with diverse communities and organizations to evaluate complex social matters, translating them into coherent issues that correspond with feasible action plans. She has formal training and experience in applied research, equity and inclusion, intercultural communication, community engagement and project planning. Prior to joining Measurement Resources, Ms. Gardiner was a Youth Service Coordinator and Program Supervisor of Ohio Guidestone's CCMEP Workforce Program in Franklin County for out-of-school youth, wherein she assisted low-income individuals (ages 16–24) with barriers to employment, to learn new skills and to obtain employment/GEDs. She also worked internationally in Kenya (2001), Mali (2009–2011), Burkina Faso (2013–2016), and Ethiopia (2018). As a Peace Corps Volunteer (2009–2011) in Mali, West Africa, she applied program evaluation and community engagement best practices to design and implement improved nutrition projects. She holds a Master's degree in Intercultural Service, Leadership and Management from the School for International Training and a PhD in Cultural Anthropology from The Ohio State University. Ms. Gardiner's doctoral studies included a concentration in public food security and land security policy, specifically understanding how culture impacts the implementation processes of new public policies to better predict and mitigate counterproductive policy outcomes. Ms. Gardiner also has strong academic knowledge in and applied experience working with organizations that address barriers to accessing social services, like libraries and programming those libraries provide, both in Ohio and internationally.

Alyssa Pettey, MA, is Director of Research and Analytics with MRC, and in July 2019, formed our second office location in Riverside, California. She will serve as **Lead Quantitative Researcher** and will oversee quantitative primary and secondary data

collection and analysis. Ms. Pettey has seven years of experience conducting data-driven evaluation projects and strategic planning for nonprofit and government organizations. Alyssa played a lead role in conducting a needs assessment for Central Ohio's response to youth experiencing homelessness. This analysis included gathering and integrating information from diverse stakeholders to develop key recommendations for how organizations who provide housing assistance can better meet the needs of those they serve. Alyssa also led the analysis of the County of Orange's processes and resources in support of children's mental health. This analysis included an examination of the resources Orange County receives from local, state, and federal government, how it spends these funds and opportunities to strengthen policies and practices to gather more funding and increase the efficiency in how these funds are spent.

Prior to working at MRC, Alyssa served at the Ohio Department of Education where she researched and analyzed education data to inform the impact state legislation has on educational outcomes. In this role, she provided practitioners with data analysis and summaries of accountability, human capital, and demographic data to inform changes to state legislation. Ms. Pettey has also served as a Research Analyst with the Ohio Department of Public Safety where she restructured, developed, and implemented organizational processes and policies for assessments in employment contexts.

Harley Vossler, MS, Research Analyst with MRC, will serve as the Quantitative Researcher for this project. Harley brings a strong background in epidemiology to MRC's team, including experience with statistical modeling of infectious disease, such as Ebola in the Democratic Republic of Congo, and data visualization. Prior to joining MRC, he spent time as a Graduate Research Assistant for the Ohio Department of Health, where he provided analysis and surveillance of COVID-19. He holds a Master of Science in Biostatistics from The Ohio State University, and a B.A. in Biology from Miami University. Additionally, Harley holds two biomedical certifications in Human Research – Human Subjects Protection (HSP), and Human Research – Human Subjects Protection (RCR). During his undergraduate years, he invested in community service activities, leading the Oxford (Ohio) Free Clinic Committee for two years, and serving as the Vice President of Service for MEDLIFE Miami University.

Erica Duncan, MSW, LSW, will serve as a Research Assistant on this project and will be responsible for assisting the project team with data collection and analysis as outlined in this proposal. Ms. Duncan joined MRC in June 2021, upon completion of her Master's of Social Work from The Ohio State University. She also holds a Bachelor of Arts in Spanish and Sociology from Mercer University. Her prior work-study experience spans a variety of non-profit organizations, including internships at the Economic and Community Development Institute and Clintonville-Beechwood Community Resource Center (Columbus, Ohio); Bike Walk Macon and The Fuller Center for Housing (Macon, Georgia); El Centro de Servicios Sociales, Inc. (Lorain, Ohio); and Old Brooklyn Community Development Corporation through AmeriCorps (Cleveland, Ohio).

Sara Parker, Communications Director with MRC, will assist with the editing and design of the final deliverables and other collateral communications tools to support this project work. From identifying target audiences and stakeholder groups to conducting outreach for the purpose of data collection, she will help guide conversations with various stakeholders and the community at large to surface participants for qualitative data collection. Additionally, Sara will design and distribute all collateral materials associated with this project, inclusive of slide decks, social media content, news releases, and more. She will work behind the scenes to plan and produce effective presentations that are conducive to fostering productive community conversations.

Sara's prior experience includes grant writing, marketing, and advocacy roles within various nonprofit organizations, including serving as Online Computer Library Center's Global Membership Communications Consultant for several years. She has also served as Marketing Director for Habitat for Humanity and SocialVentures, where she honed extensive media, event production and marketing, and agency expertise. Additional prior roles include Events Marketing Manager for *Columbus Business First* and various roles at advertising design firms.

4. Summary of Consulting Firm's Recent Relevant Experiences

In addition to project team members' individual experiences and expertise highlighted above, MRC as a consulting firm has directly served more than 200 government and nonprofit organizations and initiatives. MRC's most recent experiences in

strategic planning and community engagement are summarized below. To view our full client list, please visit: <https://measurementresourcesco.com/client-list/>

Strategic Planning Experience

We are experts in gathering and analyzing the most relevant data and information, coupling that with strategic community engagement initiatives, change management and implementation science. All of our strategic planning, community engagement, and community needs assessment projects have required us to use design thinking, collect and analyze secondary data sources, design, and implement primary data collection strategies and analysis, perform scientific writing, and present and disseminate the findings to public officials and other community stakeholders. Recently, MRC has conducted current state reports for the purpose of developing collaborative and data-driven strategic plans for Art Possible Ohio, Charitable Pharmacy of Central Ohio, City of Columbus – Columbus Public Health, Community Shelter Board, Delaware County, Ohio – Delaware Area Transit Authority, Franklin County, Ohio – Veterans Service Commission, Knox County, Ohio – District Board of Health, Ohio Alliance for Arts Education, Ohio Arts Council, Project BRAVO El Paso Community Action Program, State of Ohio Department of Mental Health and Addiction Services, State of Ohio Department of Aging, The Troy Foundation, and St. Vincent Family Services.

MRC applies **diversity, equity, and inclusion lenses** to all of our strategic planning services. MRC is passionate about creating healthy, happy communities where everyone has a fair opportunity to thrive. Our actions and previous body of work demonstrate this commitment. We take a racial and gender lens to all data analysis to ensure any disparities are illuminated and addressed in community-serving strategic plans. In addition, our researchers are trained in culturally competent interviewing and data collection practices. Our approach is to include the voices of individuals with lived experiences in all data collection efforts and to elevate and highlight these voices. MRC has previously published work on equity, including [housing equity in central Ohio](#) and [the impact of COVID-19 on women-owned businesses](#). Recently, MRC also spoke to the Ohio Governor’s Minority Health Task Force on the importance of using data with a racial and gender lens, and in engaging community members to develop plans to solve complex social problems. MRC also signed a letter supporting the Columbus Mayor’s decree that racism is a public health crisis.

MRC’s President is a Leader in Data-Driven Strategic Planning

Sheri Chaney Jones is the president of MRC and has overseen the training and qualifications of the project team. Ms. Jones’ 20 years of experience leading and managing powerful data-driven strategies for public sector organization and initiatives will ensure a successful strategic planning process and the formulation of accompanying actionable, strategic recommendations. Ms. Jones is a national thought leader on public sector high performance and data-driven strategy. Ms. Jones is the author of *Impact & Excellence: Data-Driven Strategies for Aligning Mission, Culture, and Performance in Nonprofit and Government Organizations* (Jossey Bass, 2014). This book provides government and nonprofit leaders a proven path to increase their strategic use of data to drive social impact and organizational efficiencies. Ms. Jones is an international speaker on measurement best practices and the use of community engagement and data-driven decision making for improved public sector investment and strategy development.

Prior to founding MRC, Ms. Jones served as the Performance Center Manager for the Ohio Department of Aging, Deputy Director for Performance Evaluation with the Franklin County Juvenile Court and Organizational Researcher for a Columbus-based Consulting Firm, Decision Support Services, Inc. Sheri holds a Master’s degree in Industrial and Organizational Psychology from Central Michigan University and a Bachelor of Science in Psychology from The Ohio State University. Sheri is currently President of National Association of Women Business Owners (NAWBO) Columbus, a member of the American Evaluation Association and the Ohio Program Evaluator’s Group.

MRC’s Community Engagement Research Experience

MRC specializes in community-based, data-driven collaboration for systems planning. Our approach combines the best practices of collective impact, appreciative inquiry, systems design thinking, diversity, equity, inclusion, community engagement, change management, and needs assessment prioritization. Our work with the Community Shelter Board and

Franklin County Youth Homelessness Committee demonstrated our ability to work collaboratively with multiple stakeholders. In this work, the core planning team involved funders, government leaders, nonprofit leaders, healthcare leaders, and youth who were experiencing homelessness. We organized the meetings and implemented appreciative inquiry and data-driven decisions to lead the group and the entire system of more than 200 stakeholders to develop a coordinated [community plan to end youth homelessness](#).

MRC has a proven methodology for engaging the voices of community members through online surveys and virtual focus groups/interviews. MRC will work collaboratively with Elmhurst community-based organizations and the Library's staff to identify *community champions* to inform survey distribution methods and focus group participation (e.g., Who are the trusted voices in the community? Where do minority community members seek information?). Most recently, MRC proved the success of our community engagement methodology by successfully conducting The Health Collaborative's (THC) Community Health Needs Assessment. For THC's project, MRC's community engagement strategy resulted in 8,321 valid online survey responses from community members and 234 virtual focus group participants spanning southern Ohio, northern Kentucky, and southeastern Indiana. MRC has also published an open-source [community engagement best practices guide](#) for community groups and organizations to utilize at any time.

5. Work Plan

5.1 Project Deliverables and Methodology

MRC's planning and evaluation process will allow the leadership of Elmhurst Public Library to clarify its desired future vision and to understand the current state of its strengths and opportunities. By using the contrast between the current state and desired future state, our strategic planning process will lead to a robust three- or five-year plan. This plan will establish clear priorities, define specific action steps, and identify measures needed to track success. The consulting services to be provided are:

1. Define the Current State, conduct SWOT analysis
2. Explore the Desired Future State: Defining Strategic Vision & Focus Areas
3. Create the Action Plan: Planning & Alignment of Systems
4. Design the Final three- or five-Year Strategic Plan Report

Current State Report and Methodology

The first step of strategic development is to understand the current state. MRC, in partnership with the Elmhurst Public Library's leadership, will conduct a scan of the organization's current environment (internal and external forces that may influence performance, operations, and resources). This includes obtaining data from Elmhurst Public Library's staff, stakeholders, and community members (library users and non-users). The outcome of the scan will provide critical information needed to guide future strategic development. This step will also generate key insights into the external environment in which Elmhurst Public Library must operate, as well as the library's internal realities. This data-driven approach uncovers "brutal truths" that will guide the organization's leaders to make the best strategic choices for future development. The following activities will make up the internal and external scan:

1. **Key Stakeholder and Community Survey:** MRC will work with the Elmhurst Public Library's leaders to develop an online stakeholder survey, which will be distributed to staff, board members, funders, partners, and community members. The surveys will examine key stakeholder needs based upon what they value and ways the Elmhurst Public Library can deliver superior value to the community without barriers. Multiple community engagement methods will be used to survey library users and (currently) non-library users of different age groups, cultures, and languages. MRC will work with the City to distribute the survey by engaging multiple community partners, and providing incentives for residents to complete the survey, such as drawings for gift cards.

- a. **Determining community member sampling goals.** Based on the Elmhurst’s population of just under 46,000, MRC recommends establishing a resident sampling goal of 593 residents, which will result in a 95% confidence level (the probability that the survey sample accurately reflects the attitudes of the population) with a margin of error of plus or minus 3% (the range that the population’s responses may deviate from the sample’s). Key to ensuring the survey results accurately reflect the perceptions of the community is utilizing a stratified random sample of residents aligned to the demographic makeup of the community (i.e., race, gender, ethnicity, age, income levels). To accomplish this, MRC will establish sampling goals for each demographic group of individuals using U.S. Census Bureau community statistics (i.e., compare the population demographic makeup and establish sampling goals that represent the population). When setting sampling goals, MRC will consider the potential need to oversample numerically underrepresented individuals to be sure adequate statistical inferences can be drawn about potential differences in perceptions by different demographic groups (e.g., are younger individuals less likely to endorse a specific revenue-enhancing ballot measure). Considering the potential need to oversample underrepresented groups necessary to provide community-level perceptions (i.e., not perceptions by different demographic groups), MRC will engage in survey response weighting using raking to provide population-level estimates. Raking, also known as iterative proportional fitting, is a method used to reduce biases from nonresponse and noncoverage in sample surveys. Taken together, oversampling numerically underrepresented demographic groups and incorporating survey raking will allow MRC to provide insights by different demographic groups as well as population-level estimates.

The **sampling strategy** will also be used to inform targeted survey distribution strategies, including outreach to cultural community groups or social service providers in order to increase survey participation in specific community groups. Surveys can be made available as paper versions and in select non-English languages to meet community needs that arise.

2. **Stakeholder Interviews and Focus Groups:** MRC will conduct up to 15 stakeholder interviews and focus groups combined. Working with Elmhurst Public Library, MRC will identify key funders, community partners, leaders and/or residents, whose input is critical to the success of the strategic plan. MRC will conduct specifically tailored, 45-minute phone interviews and/or 1-1.5 hour focus groups with these stakeholders and incorporate their feedback into the strategic plan. MRC will conduct virtual focus groups with a range of age groups, ethnicities, languages, abilities, non-library users, and other community groups who are less likely to participate in surveying. These focus groups and interviews will gather additional qualitative insights, not easily assessed by the survey, which will be critical for the development of the strategic plan.
3. **Document and Data Review:** MRC will work collaboratively with the Elmhurst Public Library’s leadership to pull together all relevant external and internal data (e.g., previous strategic plans, performance reports, existing needs assessments, existing publicly available data related to the Elmhurst Public Library’s target population, previous evaluation data, etc.) to assess the current strengths of and opportunities for the organization.

MRC will analyze the Staff Survey, Stakeholder Survey, focus group information, interview information, and secondary data results to formulate the Current State Report. These results will be used to brainstorm reasons for the current state, and to prioritize key insights into a concise, coherent current state story, which will be the basis for the strategic planning process.

All raw and summary data can be organized and de-identified in order to be delivered to Elmhurst Public Library at the conclusion of the strategic planning process.

Explore the Desired Future State: Defining Strategic Choices & Focus

Once the current state is thoroughly understood, the Elmhurst Public Library’s leadership will undergo a strategic planning process that will result in a clear, compelling future vision along with a winning proposition. This proposition will clearly identify what is unique about the Elmhurst Public Library, how it achieves its mission, and how it meets the needs of the community it serves. Based on the results from the Current State Report, the Elmhurst Public Library’s leadership will convene for a full-day (or 2 half-day) facilitated planning session(s) designed to:

- Explore the current state with the strategic planning committee and key staff
- Review and/or refine the Elmhurst Public Library’s vision, mission, and create core values statements.
- Identify the desired outcomes (both operational and program impacts) the Elmhurst Public Library wishes to achieve in the next three or five years. These desired outcomes become strategic focus areas.
- Define the desired initiatives and/or service priorities to be offered to achieve these outcomes. These priorities will ultimately become goals for the strategic plan.
- Define the winning proposition—what the Elmhurst Public Library does or will do differently/better to achieve greater value for stakeholders and the community. As part of this process, MRC will work with the Elmhurst Public Library to conduct a gap analysis to pinpoint where the organization is today and where it wants to be in the future.
- Develop the Strategic Action Plan. Current obstacles that are, or could be, preventing the achievement of the goals/vision will be identified so that actions plans can be developed to address these restraining forces and leverage the supporting forces.

This facilitated planning session can be effectively held virtually or in person depending on preferences and budgeting allowances. Collaboratively, MRC and the Elmhurst Public Library will identify the key strategic focus areas (priorities) that must be achieved to realize the winning proposition and long-term success.

Using the approved three- or five-Year Strategic Vision and priorities decided on by the leadership team, MRC will work directly with the Elmhurst Public Library’s board/program/department staff to facilitate a process which will help them align their everyday work to the overall strategic plan. Included in the scope of work for this proposal is an estimate that there will be **up to five** different Library departments.

Summary of Project Deliverables

1. Current State Report, including a SWOT analysis, informed by community focus groups/interviews, stakeholder surveys, and a review of internal and external secondary data.
2. Executive Leadership Strategic Planning Facilitated Meeting to review the Current State Report and establish the three- or five-year vision and strategic focus areas.
3. Facilitated meetings with staff to develop their action plans that align with the three- or five-year vision and strategic focus areas.
4. Final Strategic Planning Document that will include three-or five-Year Strategic Vision, Strategic Focus Areas, and department areas’ action plans, including recommendations for ongoing measurement and implementation of the strategic planning efforts.

5.2 Proposed Timeline

This strategic planning process will occur over a period of approximately nine months. The work will begin with the signing of an agreement and will end by October 18, 2022. A recommended project timeline is listed below:

- Kick-off Meeting with the Strategic Planning Committee by January 2022
- Development of the Staff and Stakeholder Survey and Focus Group/ Interview protocol draft based on the kick-off meeting by February 28, 2022
- Current State Data Collection (survey, interview, focus group, secondary data, and internal data): March through April 2022
- Current State Report by June 1, 2022 (or two weeks before Strategic Planning Facilitated Meeting)
- Strategic Planning Facilitated Meeting with strategic planning committee and key staff held by June 30, 2022
- Staff/Program Area Meetings held in July 2022
- Strategic Planning Document draft for review by September 1, 2022
- Final Document ready to be presented on October 18, 2022.

5.3 Estimated Hours and Project Fees

MRC bases its fees on an evaluation of our customer’s needs and an understanding of the nature and scope of the project. The fees for Elmhurst Public Library’s strategic plan as outlined in MRC’s response to this RFP are based on the types of services being offered and the type of resources needed to accomplish this project and are commensurate with the value of each service provided. MRC will make all reasonable efforts to create a product and process that meets the parameters of the project. This will be accomplished by combining the abilities and talents of MRC’s staff and those of Elmhurst Public Library’s Board of Directors, staff, and other stakeholders.

The total professional fixed-cost fee for this project is **\$45,250** for the entire project as described in the RFP. For each deliverable, we estimated the number of staff hours at each level required to successfully complete that deliverable. Table 1 outlines the estimated hours and professional fees per deliverable. This fee includes conversations, coordination, the delivery of services, the review of all relevant information, research, data collection and analysis to deliver a successful project. Internal project management, communication, quality control, coordination, and required administrative costs are configured into our hourly rates. Table provides the costs of virtual services, as well as the option for in-person services and the associated travel expenses have been included in the deliverable fees. MRC has robust experience and success in providing all strategic planning services and deliverables utilizing virtual platforms.

Table 1. Project Fees by Deliverables

Deliverables	Professional Fee	Estimated Hours
Current State Report. This includes project management meetings to understand current needs and desires, data review, community research (e.g., stakeholder survey/focus group/interview design and implementation), and creation of the Current State Report. This also includes up to \$500 in translation and interpreter fees for community research.	\$19,575	135
Facilitate Strategic Planning Retreat. This includes meeting preparation and facilitation time for the project’s two lead associates (Eliana and Eliza) to conduct a virtual, four-hour strategic planning retreat with the Elmhurst Public Library leadership and key staff.	\$3,770 (+ optional \$1,750 travel expenses if held in-person)	26
Facilitated meetings with staff to develop their action plans. This includes preparation and facilitation time for meetings with library departments. This is based on an estimation that there are up to five library staff/volunteer departments.	\$5,075	35
Final Strategic Planning Document. This includes all effort to design and implement the final strategic planning document, including an in-person presentation of the final plan on Oct. 18, 2022.	\$10,730	74
Travel Expense for In-Person Oct. 18 Presentation. This includes meeting preparation and facilitation time for the project’s two lead associates (Elaina and Eliza) to present the final plan in person.	\$1,750	Travel expense
Ongoing Product Management and Client Communications	\$4,350	30
Project Total	\$45,250	

5.4 Considerations Involved in Performing the Requested Scope of Services

While MRC's proven Current State Report and Strategic Planning services are proven to move organizations' missions forward, each of the public sector organizations we collaborate with brings a unique set of considerations—external and internal constraints, known untapped opportunities, and opportunities that have yet to be discovered. We have outlined a few key considerations that we hope will guide our work together, so that the final Strategic Plan has actionable, data-driven, and measurable goals and next steps that will help the organization achieve its goals over the course of the next five years.

- **Library User Market Saturation**—Of the 46,000 community members currently living in Elmhurst today, what percent of the total population would be considered market saturation? Where do the conversion opportunities lie, and what are the demographics of new user segments of the population? What are their specific transportation (both fixed and on-demand route) or other needs to accessing the library? What are the perceptions or barriers that are currently preventing community members from using Elmhurst Public Library? MRC will uncover the answers to these questions and more throughout the process of collecting both quantitative and qualitative data throughout this project.
- **Diversity, Equity, and Inclusion**—Elmhurst Public Library serves an ethnically diverse community and all age groups. Elmhurst' diversity also includes, but is not limited to, veterans, new Americans and first-generation immigrants, and disabled community members. How do perceptions of the Library differ among community groups, if at all? How might different community groups value or use the Library? How do barriers to using Library services vary in the community? What are the opportunities to improve diversity and inclusion within the Library structures, staff and services to meet community needs? What role can DE&I play in the Library's funding structures? MRC will uncover the answers to these questions and more throughout the process of collecting both quantitative and qualitative data throughout this project.
- **Balancing Positive Growth with Resources**—From support staff to facility maintenance, striking the balance between significantly increasing usership and meeting the community's needs at a pace that is also in step with both the human capital and funding that is available to the organization will be a critical component of long-term success. MRC is accustomed to working with public sector and nonprofit organizations, whose budgets depend on a range of sources and policies.
- **Awareness, Advocacy, Public Relations, and Marketing**—Based on the outcomes of the Current State Report Data Collection efforts, MRC will incorporate recommendations into the Strategic Plan specific to communications. Whether addressing safety concerns or demonstrating how to use new technologies, developing strategic communications and creative campaigns will be critical in the Library's ability to achieve its strategic goals.

6. Exclusions or Exceptions

MRC's project team has the experience and expertise to develop a comprehensive three- to five-year strategic plan for the Library, including the significant community research component and the application of a DE&I lens to the strategic plan. However, **Library staff and leadership are the experts of your community and the Library's organizational culture and vision.** MRC's strategic planning process is built on a collaborative methodology between MRC's project team and Library staff/executive leadership. With Library stakeholders engaged in each step, the strategic plan is iteratively informed by experts of the community and the Library staff, resulting in a highly actionable strategic plan.

7. Schedule of Costs

MRC bases its budget based on an evaluation of our customer’s needs and an understanding of the nature and scope of the project. The fees associated with this project, as itemized in Table 1, are based on the types of services being offered and the type of resources needed to accomplish this project and are commensurate with the value of each service provided. MRC will make all reasonable efforts to create a product and process that meets the parameters of the project. This will be accomplished by combining the abilities and talents of Sheri Chaney Jones, President of MRC, the project team, and staff and partners of the Elmhurst Public Library. The professional fee for this data-driven strategic planning process is \$45,250.00. Project fees will be invoiced on the following schedule:

- \$11,312.50 at the signing of the Agreement
- \$11,312.50 after the delivery of the Current State Report and Facilitated Strategic Planning Session
- \$22,625.00 with the approved final designed Strategic Plan

MRC’s not-to-exceed final total project cost: \$45,250.00

8. References

Previous MRC clients are highly satisfied with our work quality and practical implementation. We have a track record of delivering project management and data-driven strategy projects on-time and on budget. Our clients report we are experts at taking complicated topics and making them understandable, easy to implement, and impactful. The following leaders have experienced successful organizational impacts based on Ms. Norlin’s or MRC’s organizational research and strategic planning efforts.

Project Name	Contacts
Elaina Norlin Reference: DE&I Strategic Consulting for Texas State Library	Laura Tadena, Library Development and Networking Division Texas State Library and Archives Commission 1201 Brazos St Austin, TX 78701 512-463-5468, ltadena@tsl.texas.gov
MRC Reference: The Troy Foundation Strategic Plan and DE&I Assessment	Melissa A. Kleptz, Executive Director The Troy Foundation 216 W. Franklin Street Troy, OH 45373 937-339-8935, mkleptz@thetroyfoundation.org
MRC Reference: St. Vincent Family Center Strategic Plan	Susan Lewis Kaylor, President/CEO St. Vincent Family Center 1490 East Main Street Columbus, OH 43205 614-252-0731, ext. 1151, skaylor@svfc.org

Appendix A. Project Team Resumes

Elaina Norlin, MLIS

Tel. 520-548-5326

Email. Elaina_j@yahoo.com

4975 E. Sabal Palm Blvd, #212

TAMARAC, FL 33319

Education

- MLIS University of Illinois (Urbana)
- BA University of Illinois (Urbana) - Communications

Honors, Boards and Awards

- National Sales Network South Florida (Board Member)
- South Florida People of Color
- Alumni Leader of the Year Award, University of Illinois.
- Library Journal's Top 50 Movers and Shakers Award

Institutes

- Level II Facilitation Training Institute Program
- Consultation Skills Institute (Strategic Planning)
- Association for Research Libraries (LCD)
- Stanford Leadership Institute
- Fundraising Bootcamp Institute (Rutgers)

Professional work Experience

Professional Development, Association for Southeastern Research Libraries (ASERL) November 2019 - Current

- Host and deliver content for research workshops, webinars and trainings for the ASERL Professional Development Series
- Plan small and large-scale workshops on workplace engagement, organizational culture Diversity, Equity and Inclusion and leadership training.
- Collaborate with member libraries to provide strategic consultation in the areas of organization development, employee engagement and professional development.

Organizational Development Consultant, KIP Group. 2005 - Current

- Collaborate with museum, archives and library executives to provide strategic consultation in the areas of organization development, cultural sensitivity training and DEI education.
- Strategically plan and implement initiatives for overall organizational effectiveness and employee engagement.
- Conduct focus groups, webinars and workshops to determine training needs and facilitate difficult workplace conversations.

Executive Director African American Research Library and Cultural Center/Regional Library Manager, Broward County Library System Fort Lauderdale 2009- 2019.

The African American Research Library and Cultural Center is a 60,000 square foot facility that combines a museum, library, theater, archives, and children's area all in one location. As a Regional Library Manager, I supervised 6 library branch managers in the eastern region of Broward County,

Significant Highlights:

- Raised over \$50,000 for our 10th annual fundraiser.
- Solicit over \$400,000 dollars through corporate and individual donations.
- Increased our door count by 30% during a 5-year span.
- Created several award-winning exhibits and yearlong programs by combining digital humanities and technology to inspire and expand our community outreach

Manager of New Initiatives and Outreach, OCLC Eastern 2007-2009

Developed new business opportunities and products for our core programs including digitization and preservation, pre-sells, virtual reference, archives, cataloging and interlibrary loan.

Significant Highlights

- Created and delivered engaging software demonstrations and technical audits for 300+ members in the D.C., Maryland and Virginia area
- Increased OCLC Eastern new member recruitment and upsells by 25% through onsite visits and consultations.
- Through producing quality content, events and programs, raised over \$125,000 for OCLC strategic initiatives and programs through designing quality content, regional workshops and business seminars.

Senior Grant Program Officer, Institute of Museum and Library Services 2003- 2006

The Senior Grant Program officer is responsible for building program capacity requirements, develop grantees and key partners, conducting site visits and delivering educational presentations to potential grantees.

Specific Responsibilities

- Reviewed grant proposals and assesses eligibility and consistency with IMLS goals.
- Arranged for review and evaluation of grant proposals by peer review panelists.
- Presented Division policies, procedures, and funding recommendations orally and in writing to internal and external audiences.
- Delivered grant program presentations and workshops at national conferences.

Tenured Associate Librarian, University of Arizona Library, 1997-2003.

The University of Arizona Library is a Research I Institution and is a member of the Association for Research Libraries (ARL). The U of Arizona Library was a team-based institution where professional staff received academic library tenure.

Significant Highlights

- Received **early academic library tenure** (4 years instead of 6)
- Chaired the Strategic Library Planning Committee for 2 years

- 3 Step Reference Evaluation Study was selected for the College and Research Libraries publication.
- Usability Testing for Library Websites book was based on my extensive committee work on Access 2000.

Publications

- Norlin, Elaina. The Six-Step Guide to Library Worker Engagement Chicago: American Library Association June 2021
- Norlin, Elaina and Tiffini Travis Elearning and Business Plans: National and International Case Studies, Scarecrow Press, 2008.
- Norlin, Elaina and CM! Winters. Usability Testing for Library Websites, Chicago: American Library Association, 2002.

Presentations (Small sample) – Presented over 80 workshops and keynotes worldwide

- Norlin, Elaina Why Diversity Training Does Not Work, Keynote Presentation and Workshop, Washington Research Library Consortium, May 2021.
- Norlin, Elaina Stop Hiring Bad Bosses: How to Strengthen your Management Recruitment Strategies Niche Academy, June 2021.
- Norlin, Elaina Addressing Real-World Diversity and Inclusion in Libraries and Schools, Seton Speaker Series Webinar, February 2021.
- Norlin, Elaina Transforming Workplaces Through Kindness and Empathy, Keynote Presentation, November 2020.
- Norlin, Elaina Learning From Fortune 500: Engaging the Workforce, CIL and IL Connect 2020, September 21, 2020
- Norlin, Elaina Simple Ideas for Maximum Virtual Engagement, Virtual Webinar (FACRL) Sept 2020
- Norlin, Elaina DEI Committees: The Good, The Bad and The Ugly Virtual Webinar (ASERL) July 2020
- Norlin, Elaina Are Leaders Born or Made, Virtual Webinar (ASERL) April 2020
- Norlin, Elaina and Ithan Payne Visual Identity Design: Taking Marketing to a Whole New Level ACURIL Conference, June 2018
- Norlin, Elaina Marketing and Emotional Branding for Long Term Loyalty, ACURIL Conference June 2016.
- Norlin, Elaina The Art of Strategic Influence: Essential Skills for Leaders preconference workshop at the African Library Summit, Pretoria, South Africa, July 2013.
- Norlin, Elaina Public Speaking Confidence” Enhancing Your Presentation Skills Keynote presentation at the ALIA Library Technician Conference, Perth, Australia, September 2011.

ELIZABETH GARDINER, PhD

Senior Research Associate, Measurement Resources Company

1480 Manning Parkway, Suite A, Powell, Ohio 43065

Phone: (614) 947-8899

E-mail: egardiner@measurementresourcesco.com

EXPERIENCE

Senior Research Associate, Measurement Resources Company (Powell, OH) | 2018–Present

As the team's qualitative data collection and analysis expert, I develop surveys, interview protocols and focus group protocols, conduct interviews, facilitate focus groups, and collect community stakeholder feedback. Other responsibilities include authoring in-depth narratives to highlight the significant findings and recommendations resulting from MRC's research.

Qualitative Data Consultant, OSU's Ohio Global Health Initiative (Addis Ababa, Ethiopia) | 2019

Contracted by U.S. Center for Disease Control and the World Health Organization to serve as the team's expert on qualitative data collection and analysis for the assessment of Ethiopia's Surveillance System for Adverse Events Following Immunization. Duties included: training 20 Ethiopian nationals on conducting interviews, collecting interview data, and upholding ethics in qualitative research; the analysis (coding and theming) of interview data; and the presentation of findings to stakeholders.

Program Supervisor/Youth Service Coordinator, OhioGuidestone Workforce (Columbus, OH) | 2017–2018

Responsible for tracking compliance and performance measures of both state and county contracts. Redesigned program structure and staffing organization to better meet performance goals and serve clients (16–24-year old's, low income and have barriers to employment such as ESL, homelessness, childcare, criminal or foster care history).

Graduate Research Associate, OSU Department of Anthropology (Columbus, OH) | 2013–2015

Conducted secondary data analysis of an aggregated 50 published ethnographies, responsible for maintaining data spreadsheets and coding for frequencies of violence, conflict over territory, tribal relations with states, and responses to the environment. Ran correlation and multivariable regression tests to test theory of Economic Defense Model.

Lead Immigration Assistant, U.S. Citizenship and Immigration Services (Columbus, OH) | 2012–2013

Duties included reviewing of work-flow systems, making recommendations to improve workflow, and implementing recommendations to improve office performance in accordance to policy.

EDUCATION

- **The Ohio State University (Columbus, OH) | 2013–2020**

Ph.D. in Cultural Anthropology

Ethnographic study that aims to build theory that better predicts on-the-ground outcomes of policy changes, specifically in terms of Sustainable Development Goals policy initiatives related to land security and food security.

Conducted upwards of 40 in-depth interviews and 360 surveys throughout 12 months in Burkina Faso, West Africa.

Data collection and analysis follows the Iterative, Recursive, and Abductive (IRA) Approach.

- **The School for International Training, World Learning (Brattleboro, VT) | 2008–2009**

M.A. in Intercultural Service, Leadership, and Management

Theory and practice of intercultural organizational behavior, project planning/management, communication and conflict mediation.

- **Masters International Fellow at Peace Corps Mali** | | 2009–2011
Conducted thesis study on efficacy of Peace Corps Training Program in building cross-cultural competencies, which lead to recommendations implemented both in Mali’s training program and at Peace Corps Headquarters. Data collected with interviews, focus groups and surveying. Data analysis aggregated, coded and themed qualitative data.
- **The Ohio State University** (Columbus, OH) | 2004–2008
B.S. in Zoology and Minor in Cultural Anthropology
Included 5-month self-directed, mixed-method study in Kenya on how community attitudes towards conservation efforts are being impacted by dynamics of ethnicity, gender, livelihood, and location. Conducted interviews and surveys to gather data. Resulted in making recommendations to improve communication and working relationships between community leadership, non-profit institutions and government officials.

DOCTORAL RESEARCH GRANT AWARDS

- United State’s Borlaug Fellowship in Global Food Security (2015–2016)
- The Ohio State University’s Office of International Affairs Enrichment Grant (2015)
- West African Research Association (Boston-Dakar) Fellowship (2015)
- The Ohio State University’s Mershon Center for International Security Studies Research Grant (2014)
- The Elizabeth A. Salt Anthropology Travel Award Grant (2014)
- The Ohio State University’s Office of International Affairs Graduate Research Grant (2014)
- National Science Foundation Research Experience for Graduate Students (2014)
Agricultural and Development Economics’ Environmental Policy Initiative Grant (2014)

ALYSSA PETTEY ROCKWOOD

Director of Research and Analytics, Measurement Resources Company

Riverside, CA

Phone: (909) 586-4266

Email: apetty@measurementresourcesco.com

Social science researcher with experience using data to increase the impact of services and programs, while facilitating leadership in communicating the social impact of their organizations and providing data-driven recommendations for improvement; strong background in data collection and analysis with the ability to communicate complex statistical analyses into actionable recommendations for leadership; strong interpersonal skills and ability to communicate clearly to both technical and non-technical audiences.

PROFESSIONAL EXPERIENCE

Director of Research and Analytics, Measurement Resources Company (Columbus, OH) | 2017–Present

Provide consultative research and analysis services to government and nonprofit organizations in the following areas:

- **Strategic planning and gap analysis:** guide organizations through the strategic planning process by examining the current state of the organization through in-depth internal and external organizational research auditing and research, and facilitating leadership through defining the desired future state of the organization and concrete action steps to move to the desired future state
- **Impact Evaluation and Needs Assessment:** conduct research and evaluation of organizational programs and services (e.g. affordable housing programming, educational programming, mental health services, homelessness services) by examining a variety of data sources to determine the impact of services/programs and provide data-driven recommendations for improvement
- **School Climate and Organizational Culture Evaluation:** develop, implement, and analyze school climate and organizational culture surveys to identify strengths and opportunities for improvement and provide recommendations to leadership on implementing change management principles
- **Develop and maintain data management and statistical analysis tools** to aid organizations in the evaluation and planning of programs and services (e.g., develop Excel macros to track mental health client functioning; develop a multi-year homelessness modeling tool to examine homelessness system demands based on changing socioeconomic factors; conduct predictive analytics to determine prevalence of food insecurity in Central Ohio based on socioeconomic factors)
- **Collective Impact Evaluation and Facilitation:** develop measurement tools to assess the effectiveness of multi-organization collaborations, analyze attitudinal and impact data, interpret results and communicate the impact to stakeholders
- Specific technical tasks and skillsets utilized include: assessment/test creation and validation, advanced statistical analyses (e.g., factor analysis, regression, multi-level modeling), R and Excel computer programming (e.g., macro development), Tableau mapping, and technical and non-technical (for lay audiences) report writing

Social Sciences Research Specialist, Ohio Department of Education (Columbus, OH) | 2016–2017

- Independently, and as part of a team, conduct research concerning the Local Report Card and Ohio's Accountability System

- Collect and analyze complex relational databases using SAS, SQL, and MicroStrategy to assist educators and the Department in understanding the impact of various accountability requirements on student and school/district outcomes
- Utilize Microsoft Excel to provide narrative reports of data using charts and graphs to assist the State Board of Education and other stakeholders with the interpretation of accountability data
- Provide interpretation of complex statistical analyses (e.g., value-added growth models) to customers (e.g., parents, educators, reporters, superintendents, etc.)
- Participates in internal advisory groups to help define impact and implications of legislation on state accountability and data reporting systems.
- Cooperates with the Office of Communications to develop data for public release

Organizational Assessment Research Analyst, State of Ohio, Department of Public Safety

(Columbus, OH) | 2015–2016

- Independently develop and validate assessments (i.e., 10 proficiency exams, two civil service exams, and over 50 structured interviews) necessary for personnel selection and development to ensure alignment with EEO laws and best practices
- Independently formulate procedures for developing scored, structured interviews and employment exams used throughout the Department of Public Safety
- Assist in the development of the strategic workforce plan by reporting on progress made towards strategic goals in previous years and outlining the plans and goals for successive years
- Perform job analyses by conducting extensive research on job requirements to develop testing and assessment materials to ensure selection and promotional assessments are validated and legally defensible
- Perform statistical analyses (e.g., multiple and simple regression, point-biserial correlations, item discrimination statistics, item difficulty statistics, adverse impact analyses) to evaluate assessment data
- Review, process, and provide feedback on performance development documents in OAKS HCM to ensure development goals are specific and attainable, and that the content of the documents provide the necessary information needed to recognize and develop employee performance
- Document the test validation process by creating reports to describe: pre-test development research, job analysis procedures, item writing, item review, pilot testing, and test implementation procedures
- Independently researched testing software companies to make a recommendation for purchase to senior leadership
- Utilize FastTest software to develop and analyze the results of online exams

Classification and Compensation Intern, County of Riverside, Human Resources Department

(Riverside, CA) | 2014–2015

- Conduct multiple job analyses for the purposes of recruitment and updating job specifications
- Contribute to the classification study process, which includes conducting internal and external market salary surveys and job audits
- Assist the Classification and Compensation Unit with the transition to an electronic position description questionnaire, while also providing recommendations for data analysis
- Assist in the analysis and interpretation of position description questionnaire data
- Assist recruiters with the development of screening questions used in the Talent Acquisition Management applicant tracking system

- Update and edit job descriptions to ensure essential job duties and the necessary knowledge, skills, and abilities needed to perform the job duties are accurately reflected in the description

EDUCATION

- **California State University, San Bernardino** (San Bernardino, CA) | September 2015
M.S. Industrial-Organizational Psychology
- **California State University, San Bernardino** (San Bernardino, CA) | March 2013
Bachelor of Arts in Psychology

HARLEY VOSSLER

Research Analyst, Measurement Resources Company

1480 Manning Parkway, Suite A, Powell, Ohio 43065

Phone: (614) 947-8899

E-mail: hvossler@measurementresourcesco.com

EXPERIENCE

Research Analyst, Measurement Resources Company (Columbus, OH) | 2021–Present

- Consult with nonprofits and government agencies to increase organization and program efficiency through research and evaluation
- Develop reports based on organizations, population, and community level data for understanding impacts and programmatic improvements
- Research strategies and methods to improve organizations' programs for increased efficiencies and outputs
- Work to improve organizations' effectiveness through encouraging robust measures of inputs, outputs, and outcomes
- Conduct primary data collection, synthesizing and aggregating results, through conducting interviews and focus groups
- Perform secondary data collection and analysis from online sources and pulling data from already existing research to produce infographics that visually convey concise messages

Graduate Research Assistant, The Ohio State University (Columbus, OH) | 2019 –Present

- Analysis and surveillance of Covid-19 – collaboration with Ohio Department of Health
- Statistical modeling of infectious disease, such as Ebola in the Democratic Republic of Congo
- Data visualization – R Shiny apps, geographical mapping, time series animation

Undergraduate Research Assistant, Population Genetics Lab | (2017–2019)

- Project 1: Extensive Microsoft Excel work, organizing and analyzing microsatellite data, standardizing data sets. Used Structure to create plots displaying genetic variation information.
- Project 2: DNA replication with PCR, Gel electrophoresis, Exo-Sap, Precipitation of DNA.
- Undergraduate Research Trainer: Teaching lab benchwork techniques, analysis of DNA sequences.

ORGANIZATIONS AND AFFILIATIONS

- OAPSS CPH Student Advising Committee (September 2019–Present)
 - Work with staff to identify areas of the College of Public to improve, implement changes.
- Leader of Oxford Free Clinic Committee (January 2017–May 2019)
 - Run a committee comprised of Miami students which is closely partnered with Oxford Free Clinic.
 - Organize fundraisers, events, assist in running clinics, etc.
 - Work alongside the Director of the Oxford Free Clinic to implement a pilot program run by the State of Ohio to assist low-income patients in dealing with asthma.
- VP of Service - MEDLIFE Miami University (January 2017–May 2019)
 - Assist in club fundraising and events including planning annual 5k color run for charity.

- Oxford Free Clinic Board of Directors (August 2017–May 2019)
- Remain closely in touch with the Board as well as Director of the Free Clinic.

SKILLS & CERTIFICATIONS

- Regression Methods
- R
- R Shiny
- Python
- STATA
- Data Visualization
- Clinical Trial Design
- Bayesian Methods
- Human Research – Human Subjects Protection [HSP] (Biomedical), CITI Program, A Division of BRANY (Issued 2020; Expires Jan. 2023)
- Human Research – Human Subjects Protection [RCR] (Biomedical), CITI Program, A Division of BRANY (Issued 2020; Expires Jan 2023)

EDUCATION

- **The Ohio State University** (Columbus, OH) | May 2021
M.S. in Biostatistics
- **Miami University** (Oxford, OH) | May 2019
Bachelor of Arts, Biology

ERICA DUNCAN, MSW, LSW

Research Assistant, Measurement Resources Company

1480 Manning Parkway, Suite A, Powell, Ohio 43065

Phone: (614) 947-8899

E-mail: eduncan@measurementresourcesco.com

EXPERIENCE

Research Assistant, Measurement Resources Company (Columbus, OH) | 2021–Present

- Consult with nonprofits and government (State and local) agencies to increase organization and program efficiency through research and evaluation
- Develop reports based on organizations, population, and community level data for understanding impacts and programmatic improvements
- Research strategies and methods to improve organizations' programs for increased efficiencies and outputs
- Work to improve organizations' effectiveness through encouraging robust measures of inputs, outputs, and outcomes
- Conduct primary data collection, synthesizing and aggregating results, through conducting interviews and focus groups
- Perform secondary data collection and analysis from online sources and pulling data from already existing research to produce infographics that visually convey concise messages

Summer VISTA Associate & Master of Social Work Advanced Field Practicum, Economic and Community Development Institute (ECDI) (Columbus, OH) | June 2020–May 2021

- Working both in the Lending Department and the Women's Business Center, supported client outreach with underserved entrepreneurs; designed programs; surveyed the needs of small businesses; and recognized the impact of economic development for low-/moderate-income neighborhoods.

Master of Social Work Generalist Field Practicum, Clintonville-Beechwold Community Resource Center (Columbus, OH) | January–April 2020

- At a community-based social services agency, familiarized with community resources, case management, aging-in-place programs, and the relationship between micro- and macro-level work.

Summer Associate, Old Brooklyn Community Development Corporation through AmeriCorps (Cleveland, OH) | June–August 2019

- As part of a team, worked on outreach, organization, operation, and evaluation of the weekly summer Farmer's Market in an ongoing effort at the CDC to encourage equitable community health through layered interventions.

Fall/Spring Intern Bike Walk Macon (Macon, GA) | August 2018–May 2019

- Focused on advocacy, communications, and engaging the community through events such as Open Streets and Bike Party in order to support sustainable organizational growth and promote alternative transportation options for people of all ages and abilities in Macon, Georgia.

Community Development Program (CDP) Intern, El Centro de Servicios Sociales, Inc. (Lorain, OH) | May–August 2018

- Building off the previous summer of familiarization and organizational research on the potential for a CDP, completed a large-scale community survey to understand, analyze, and quantify the community’s concerns and ideas, yielding an actionable, data-driven plan for the CDP. Additionally, worked with a team in a bilingual setting to facilitate a mini-grant program aimed at empowering residents.

Community Development & Marketing Intern, The Fuller Center for Housing (Macon, GA) | August 2017–May 2018

- Focusing especially on housing rehabilitation, blight remediation, and the low-income community, gained experience in community engagement initiatives such as canvassing and newsletters, fundraising events, grant-writing, and social work alongside formal administrative tasks.

EDUCATION

- **The Ohio State University** (Columbus, OH) | May 2021
Master of Social Work, concentrating in Communities & Social Justice
- **Mercer University** (Macon, GA) | May 2019
Bachelor of Arts in Spanish and Sociology (Minor in Environmental Studies)

SKILLS

- Spanish Proficiency
- Graphic Design
- Social Media
- Microsoft Office
- Organization
- Initiative
- Collaboration
- Communication
- Time Management
- Adaptability
- Data Analysis
- Relationship Building

SARA PARKER

Communications Director, Measurement Resources Company

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E-mail: sparkers@measurementresourcesco.com

EXPERIENCE

Communications Director, Measurement Resources Company (Columbus, OH) | 2020–Present

- Provides copywriting across Measurement Resources' marketing channels, including print, web, email, traditional and social media, in addition to copywriting, editing and proofing of client deliverables
- Develops visually stimulating design for Measurement Resources' projects and client deliverables
- Conducts literature reviews and provides research support, including stakeholder interviews
- Assists with business development, lead generation, proposal writing, networking, and event planning

Founder, Sparker Studio, LLC (Columbus, OH) | 2015–2020

Sparker Studio provides copywriting, event planning, marketing, social media, public relations and content management services.

Client: The Ohio State University Wexner Medical Center (Columbus, OH) | 2017–2020

- Developed award-winning applications to promote the organization's sustainability initiatives resulting in multiple national, state and local recognitions annually.
- Conducted more than 75 interviews and develop articles that showcase the initiatives and accomplishments supporting the achievement of the organization's strategic plan goals.

Client: Measurement Resources Company (Powell, OH) | 2018–2020

- Provided copywriting, editing and proofreading services for multiple internal and external research reports and communications. Designed and provided photography for community research reports and guides. Managed newsletter, social media and website content.

Client: (Marketing Director) SocialVentures (Columbus, OH) | 2015–2019

- Oversaw communications, media relations, event planning, branding, design and development vendor relationships on behalf of the organization. Developed content, including monthly newsletter, social media, and a column in the online publication, *The Metropreneur*.

Client: (Account Services) Fulcrum Creatives (Columbus, OH) | 2015–2016

- Managed client relations to ensure that creative solutions met clients' business needs, on time and within budgets.

OCLC, Inc. (Dublin, OH) | 2007–2015

Global Membership Communications Consultant (2009–2015)

- Led communications to inform more than 22,000 members of a new governance structure, promote solicitation of candidates and hold first elections. Multiple communications were sent across all available channels, including Web, social media, direct mail and e-mail—distributed to members throughout the Americas and in four languages.
- Launched and served as editor of monthly e-newsletter with approximately 70,000 subscribers from more than 40 countries.
- Conducted extensive research on leading global cooperatives and reported findings to global executive leadership and board members.

Creative Services Writer, Service Center Marketing (2007–2009)

- Developed key messages and communications plans to introduce several major changes to OCLC’s business model; provided project management for distributing communications to more than 20,000 customers.
- Wrote and edited four e-newsletters (Canada, Latin America and two monthly U.S.-based publications). Consistently achieved an open rate of 14% for a majority of electronic communications.
- Developed key messaging and content across all corporate communications vehicles, including articles, news releases, e-mail announcements, website content, conference materials and quarterly print magazine articles. Managed website content for four U.S.-based websites.

Additional Employment History

- Copy/Marketing Specialist, GREENCREST (2006–2007)
- Event Marketing Manager, Columbus Business First (2002–2006)
- Grants and Marketing Director, Greater Columbus Habitat for Humanity (2001–2002)
- Account Coordinator, Janoski Advertising Design (2000–2001)
- Research Assistant, Brains for Business (2000)
- English Teacher, AEON Inter-Cultural Corporation, Yokohama, Japan (1998–1999)

EDUCATION

- **Kenyon College** (Gambier, OH) | 1998
B.A. Classics, German; Junior Year in Munich, Germany, through Wayne State University

COMMUNITY

- Master Gardeners of Union County (OSU Extension): Member 2013–Present; Vice President 2020; President 2021
- Ohio State Beekeepers Association: Member 2018–Present
- Columbus Arts Festival: Volunteer 2015–2016