

## ATTACHMENT H

### Approval of Request for Proposal (RFP) for Strategic Planning Consultants

The Library will embark upon the strategic planning process in 2022. This is an RFP for strategic planning consultants. The proposal includes a comprehensive community survey component.

Elmhurst Public Library

Strategic Planning

Request for Proposal

August 2, 2021

**A. Objective**

The Elmhurst Public Library (EPL) seeks a consultant to develop a comprehensive 3-5 year strategic plan for the Library that includes a significant community research component. The Library is anticipating an emphasis on Diversity, Equity and Inclusion (DEI) in its new strategic plan. Ideally, the strategic planning consultant would also have experience leading discussions around DEI, or works in partnership with a third party which does, as it applies to research for strategic planning.

**B. Deadline for receipt**

Proposals must be received via email before 10:00 a.m. (date). Proposals should be addressed to Mary Beth Harper, Director, Elmhurst Public Library and emailed to [Marybeth.harper@elmlib.org](mailto:Marybeth.harper@elmlib.org).

**C. Inquiries**

Inquiries must be made via email. Please address all inquiries to: [Marybeth.harper@elmlib.org](mailto:Marybeth.harper@elmlib.org). Telephone inquiries will not be addressed. Answers will be provided within 3 business days. All questions must be received no later than (date).

**D. Background**

Elmhurst Public Library in Elmhurst, Illinois (population 44,000) is located approximately 15 miles west of downtown Chicago. The Library's collection includes approximately 300,000 items, with an annual circulation of over 1.2 million. There are 100 staff members (54 FTEs). The Library is open 72 hours per week year round. The annual budget is 6.8 million and the Library is in sound financial shape.

**E. Scope of Work**

EPL is seeking an experienced, professional facilitator to perform the following:

1. Facilitate the strategic planning process using a methodology effective for public libraries.
2. Gather data through community research that focuses on library users, non-users, and stakeholders, including Board and staff, to identify Library needs/wants.
  - a. Community input is a key component of this planning process and may include:
    - i. Focus groups/individual interviews/public input sessions

- ii. Online survey
- iii. Phone interviews
- iv. Other methods as identified by the consultant

Please include your proposal suggestions for handling research.

3. Facilitate planning meetings and input sessions (public, Board and staff sessions).
4. Review the current mission statement and facilitate revisions, and create core values statement.
5. Identify service priorities, goals, objectives and activities.
6. All raw and summary data is to be delivered to EPL at the conclusion of the planning process.

#### **F. Proposal Content Requirements**

1. A cover letter providing a brief description of the firm or individual name, address of consultant, telephone number, and email of principal contact person.
2. Executive summary of the highlights of the proposal, not to exceed one page in length, and conveying the consultant's understanding of the purpose and expected outcomes of the project.
3. A list of key personnel who would be involved in the process and their experience/expertise. If you plan to contract with a third party vendor to conduct the community research component, please identify what firm you plan to use.
4. A summary of the consulting firm's qualifications and relevant experience.
5. A work plan that includes a description of the methodology, tasks, timeline and estimated total amount of time what would be spent on the project.
6. Exclusions or exceptions. Note any parts of the proposal that is beyond the expertise of the consultant, or would be better handled by Library staff.
7. A schedule of costs that includes consulting, supplies, number of onsite visits and cost per trip, and other costs associated with the planning process. Costs for data gathering and analysis (community research component) must be listed separately.
8. References and contact information for three (3) organizations for which the facilitator has provided strategic planning services. A public library would be preferred as one of the three references.

#### **G. RFP Standards and Selection Criteria**

1. EPL reserves the right to cancel the award of contact any time before the execution of the contract by both parties. The responding consultants bear sole risk and responsibility for costs incurred in the preparation of the proposal.
2. No Library Board or staff member shall have a financial interest in the proposal.
3. In cases of disputes over differences of opinions as to the services in the proposal, the decision of EPL shall be final.

4. EPL reserves the right to ask for clarification in the proposal if the need arises, and to select a planning consultant based directly on the proposal or to negotiate further with one or more respondents.
5. EPL reserves the right to reject any or all responses to this RFP.
6. The proposal will be evaluated by EPL and will include the following criteria.
  - a. Responsiveness of the written proposal to the purpose and scope of the project.
  - b. Demonstrated knowledge, skills, and experience in conducting strategic planning projects for public libraries.
  - c. Methodology and timeline for carrying out tasks in the scope of work.
  - d. Cost to complete the process.
  - e. Ability to meet deadlines and operate within budget.
  - f. Positive experience and success in strategic and library planning; satisfactory performance record (references).

#### **H. RFP and Planning process Timeline**

1. Proposals must be received via email before 10:00 AM October 11, 2021.
2. All questions must be received no later than October 4, 2021.
3. Consulting firm selected will be discussed at October 19, 2021 EPL Board Meeting.
4. Strategic planning begins in January 2022.
5. A draft report/plan and executive summary are to be submitted to the Library Director three (3) weeks in advance of the final deliverable date.
6. Final deliverable to be presented in person at the August, (date) 2022 Board Meeting.