



Strategic Planning Request for Proposal March 2023

A. Objective

The Palatine Public Library District (PPLD) seeks a consultant to develop a comprehensive three- to five-year strategic plan for the library that includes a significant community research component.

B. Deadline for Receipt

Proposals must be received via email before 12:00PM on Friday, April 7, 2023. Proposals should be addressed to Jeannie Dilger, Executive Director, Palatine Library District, and emailed to director@palatinelibrary.org.

C. Inquiries

Please address all inquiries to: director@palatinelibrary.org or 847-907-3600 x209.

D. Background

The Palatine Library District at 700 N. North Ct., Palatine, IL 60067 (pop. 89,000), is located 32 miles northwest of downtown Chicago. The library's collection includes about 200,000 items, with an annual circulation of around 1,242,000. The staff consists of 105 employees (78 FTEs) who work in three locations; the Main Library is a 90,000 square foot facility that is open 70 hours per week; the North Hoffman Branch is a 1,200 square foot facility that is open 44 hours per week; and the Rand Road Branch is a 1,200 square foot facility that is open 43 hours per week. Annual operating revenue is approximately \$10M, and the Library is in sound financial shape due to a conscientious board and administration.

The Library just completed a strategic plan that covered 2019-2022. Activities undertaken included passing an operating increase referendum, renovation of the public areas of all three locations, joining a catalog consortium, and increasing staff and benefits.

E. Scope of Work

PPLD 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 as well as ways to increase library usage. Use of a third-party research firm is acceptable, and PPLD will also accept proposals for this individual component.

Community input is a key component of this planning process, and must include:

- i. Focus groups / public input sessions / individual interviews
- ii. Paper and online survey
- iii. Other methods as identified by the consultant



The Library District is a very diverse community, with many languages and nationalities represented. Proposals should discuss ways to reach our various populations. Surveys and other types of gathering data will need to be conducted in Spanish as well as English. Please include costs for survey translation and other multi-language components.

3. Facilitate planning meetings and public, board, and staff input sessions.
4. Review the current mission and vision statements, values, and culture statement and make revisions as required.
5. Identify service priorities, goals, objectives, and activities.
6. Write and present the strategic plan that will be communicated to the library's stakeholders. The final deliverable should include:
 - i. An up-to-date community profile and identification of community markets.
 - ii. An assessment of the library's environment, including evaluation of strengths and weaknesses, quality of services, reputation, management, and budget, etc.
 - iii. Specification of the mission, vision, core values, and culture of the organization.
 - iv. Clearly defined priorities, goals, and objectives that are measurable and for which the library will hold itself accountable.
 - v. Specification of a built-in process of regular review, evaluation, and adjustment to the plan resulting from changes in the economic, demographic, or political climate.
7. All raw and summary data is to be delivered to PPLD 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. A list of key personnel who would be involved in the process and their expertise/experience. If you plan to contract with a third-party vendor to conduct the community research component, please identify what firm you plan to use.
3. A summary of the consulting firm's qualifications and relevant experience. The successful firm and their subcontractors will have demonstrated expertise in strategic planning.
4. A work plan that includes a description of the methodology, tasks, timeline, and estimated total amount of time that would be spent on the project. Responses that fail to include a timeline will not be considered.
5. Exclusions or exceptions. Note any parts of the proposal that is beyond the expertise of the consultant or would be better handled by local library staff.
6. 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. Virtual visits are acceptable.
7. References and contact information for three organizations for which the facilitator has provided strategic planning services.



G. RFP Standards and Selection Criteria

1. PPLD reserves the right to cancel the award of contract any time before the execution of the contract by both parties. The responding consultants bear sole risk and responsibility for costs incurred in the preparation of the proposal.
2. No library board or staff member shall have a financial interest in this proposal.
3. In cases of disputes over differences of opinions as to the services in the proposal, the decision of PPLD shall be final.
4. PPLD 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. PPLD reserves the right to reject any or all responses to this RFP.
6. The proposal will be evaluated by PPLD and will include the following criteria:
 - i. Responsiveness of the written proposal to the purpose and scope of the project.
 - ii. Demonstrated knowledge, skills, and experience in conducting strategic planning projects.
 - iii. Methodology and timeline for carrying out tasks in the scope of work.
 - iv. Cost to complete the process.
 - v. Ability to meet deadlines and operate within budget.
 - vi. 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 12:00PM on Friday, April 7, 2023
2. Short list interviews will be conducted Tuesday, April 18, 2023 between 5:00-7:00PM
3. Consulting firm selected and confirmed at the April 18, 2023 PPLD Board meeting.
4. Strategic planning process officially begins May 1, 2023. Pre-planning can begin as soon as the contract is signed.
5. Tentative plan creation timeline:
 - i. May-July 2023 – Gather community, staff, board feedback through surveys and workshops.
 - ii. August 2023 – Identify primary initiatives and present to PPLD Board
 - iii. September 2023 – Create draft plan with goals, objectives, and activities
 - iv. October 2023 – Approve final plan at the October 17, 2023 PPLD Board meeting
 - v. January 1, 2024 – Official kickoff of new strategic plan