

Strategic Planning Request for Proposal

January 15, 2021

A. Objective

1. The Schaumburg Township District Library (LPLD) seeks a consultant to develop a comprehensive 3-5-year strategic plan for the Library that includes a significant community research component.

B. Deadline for receipt:

1. Proposals must be received via email by 4pm Monday March 1, 2021. Proposals should be addressed to the Executive Director, Annie Miskewitch, Schaumburg Township District Library and emailed to amiskewitch@stdl.org.

C. Inquiries

1. Inquiries must be made via email. Please address all inquiries to: amiskewitch@stdl.org. Telephone inquiries will not be addressed. Answers will be provided within 3 business days. All questions must be received no later than Thursday, February 25, 2021.

D. Background

1. The Schaumburg Township District Library in Schaumburg, IL (pop. 132,000 based on 2017 data), is located about 30 miles north of Chicago. The Library is located within a township and consists of the following villages:
 - i. Elk Grove
 - ii. Hanover Park
 - iii. Hoffman Estates
 - iv. Rolling Meadows
 - v. Roselle
 - vi. Schaumburg
 - vii. Streamwood
2. STDL is the second largest public library in Illinois with over 600,000 items to its physical collection. Pre-covid, we had one million visitors per year.

SchaumburgLibrary.org

CENTRAL LIBRARY

130 S. Roselle Road • Schaumburg, IL 60193
(847) 985-4000 PHONE • (847) 923-3131 FAX

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1266 Irving Park Road • Hanover Park, IL 60133
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3. The staff consists of over 260 employees who work either at our Central location, which is 166,000 square feet, or at one of our two branch locations in Hanover Park and Hoffman Estates. Annual revenues exceed \$16M and the library is in sound financial shape due to a conscientious board and administration. A new director was hired in December of 2019 after the departure of the previous director.
4. Our Township diversity is rising with increases in Asian and Latino populations. Work performed by Rob Paral and Associates in August 2019 noted our Township makeup is 57% white, 22% Asian, and 14% Latino. Paral and Associates also noted 43,000 residents speak a language other than English at home. Schaumburg Township has a significant senior population. This data can be provided upon request.
5. The Library has operated under a Plan of Service and has tried to provide quarterly updates to the Board under the core values of Service (S), Trust (T), Dedication (D), and Leadership (L). We now wish to engage in a formal, strategic planning process to guide our work and responses to our community that has all stakeholder input considered.
6. **Mission Statement:** We are committed to providing relevant information, books, media, technology, and programs for all ages in a safe and friendly environment through the service of well-trained staff.

Vision Statement: A Bridge to Your Future

E. Scope of Work

STDL 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 cardholder registration and library usage. Use of a third-party research firm is acceptable, and STDL 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/online survey

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- iii. Phone follow up interviews
- iv. Other methods as identified by the consultant

Surveys and other types of gathering data may need to be conducted in multiple languages. Please include costs for survey translation and other multi-language components.

3. Facilitate planning meetings and public, board, management, and staff input sessions.
4. Review the current mission statement, make revisions if and as required through discussions, and review current core values.
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 environments, including evaluation of strengths and weaknesses, quality of services, reputation, management, and budget, etc.
 - iii. Clearly defined priorities, goals, and objectives that are measurable and for which the library will hold itself accountable.
 - iv. 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 STDL 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 two pages 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 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.
4. A summary of the consulting firm's qualifications and relevant experience. The successful firm and their subcontractors will have demonstrated expertise in library operations, services, trends and functions as well as strategic planning experience.
5. 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.
6. 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.
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 organizations for which the facilitator has provided strategic planning services. One of the three references must be a public library.

G. RFP Standards and Selection Criteria

1. STDL 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 STDL shall be final.
4. STDL 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. STDL reserves the right to reject any or all responses to this RFP.
6. The proposal will be evaluated by STDL 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 for public libraries.
 - 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).
7. Responses will be evaluated by the Executive Director who will present her recommendations to the Board. Interviews may also be scheduled as part of process.

H. RFP and Planning Process Timeline

1. Proposals must be received via email before 4:00PM Monday, March 1, 2021.
2. All questions must be received no later than 4:00PM Thursday, February, 25, 2021
3. Consulting firm selected and confirmed at April 19, 2021 STDL Board meeting.
4. Strategic planning process begins July 2021.
5. A draft report/plan and executive summary are to be submitted to the Library Director three weeks in advance of the final deliverable due date.
6. Final deliverable to be presented in person at the November 15, 2021 STDL Board meeting.

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