

REQUEST FOR PROPOSAL

STRATEGIC PLANNING for Clarkston Independence District Library

Section I: Introduction

The Clarkston Independence District Library (CIDL) is seeking consultant services to assist the Library Board, staff, and community in developing a comprehensive strategic plan. The plan will include priorities, goals, measurable objectives, timelines, and proposed activities to meet expressed community needs for library service over the next one to three years based on an overarching longer-range vision.

Section II: Background

Clarkston Independence District Library is a Class V library located in Oakland County, Michigan. The library district boundaries include the City of the Village of Clarkston and the Charter Township of Independence. The official service population as verified by the Library of Michigan is 37,614.

The library is an independent taxing authority governed by a seven-member Board of Trustees, with two trustees appointed by the Council of the City of the Village of Clarkston and five trustees appointed by the Board of the Charter Township of Independence. The trustees serve three-year terms. Tax revenue from an eight-year millage renewed by the voters in 2022 comprises approximately 95% of the library's \$2.4 million operating budget. The Friends of the Clarkston Independence District Library, a non-profit organization, has the purpose to Enrich, Encourage and Support Our Library for our Community, and provides generous additional supplemental funds through memberships, donations, and fundraisers.

The Clarkston Community Women's Club first initiated the library in 1954. It was formally established as a township library in 1965 and moved into a newly built 4000 sq ft library at 6495 Clarkston Road in 1969. Per the quit-claim deed, the library is built on a piece of property granted by the Clarkston Community School District for the purpose of building a public library. The building was expanded to its current 20,000 square feet in 1992. The library was re-established as a district library in 2012.

CIDL currently provides the community with a collection of nearly 225,000 physical and electronic items, including books, magazines, movies, music, and more. There are approximately 13,500 active registered library card holders, and that number continues to grow. In 2022, the library circulated nearly 334,000 items, had over 90,000 visitors, and answered approximately 12,000 questions. In addition, there were 47,500 computer and wireless users and nearly 11,000 program participants.

CIDL is a member of The Library Network cooperative and participates in the statewide MeLCat interlibrary loan program, loaning and borrowing a total of 13,000 items with other libraries. Polaris is the library's integrated library system and the EnvisionWare RFID system provides patrons the convenience of two self-checkout stations.

CIDL provides a wide array of programs for all ages, including a Summer Reading Program that grows in popularity each year. The library offers traditional services such copiers, Notary and test proctoring, as well as innovative services such as 3-D printing, circulating board games and a seed library.

The library's full mission statement is:

Clarkston Independence District Library: the community's cornerstone of lifelong learning through innovation, enrichment and education.

The library's corresponding logo:



Section III: Project Scope

Clarkston Independence District Library seeks an experienced professional to:

- Design and facilitate a strategic planning process that is effective for public libraries and will:
 - Gather data on and from library users, non-users, and stakeholders
 - Create an up-to-date community profile and identify community markets
 - Assess the library's environment, including peer comparisons to other libraries of similar size and service population
 - Review current trends in library service and technology and analyze user expectations regarding those trends
 - Identify service priorities and needs
 - Identify and address gaps between current library operations and service priorities
 - Recommend measurable objectives and goals
 - Define timelines and benchmarks for progressing
 - Make recommendations for moving the library forward with short term and long term options
- Facilitate planning meetings and public input sessions

- Write and present findings and recommendations for moving the library forward to library stakeholders
- Prepare a final version of the strategic plan, including goals, objectives, and strategies

Section IV: Proposal Content Requirements

Responses to this RFP must include the following elements:

- Cover letter providing a brief description of the firm or individual, name, address of consultant, telephone number, and e-mail of the principal contact person
- Executive summary of the highlights of the proposal
- Summary of the consultant's qualifications and relevant experience, along with a list of key personnel who would be involved in the process, with a description of their backgrounds and areas of expertise
- Work plan that contains a description of the methodology, tasks, timeline, and an estimate of the amount of time that would be spent on the project
- Project budget that includes consulting costs, clerical costs, and data analysis costs; estimate the number of facilitator hours to be provided and the rate per hour; indicate a "not to exceed" total cost
- Signature by an individual authorized to bind the proposer, with a statement that the proposal is a firm offer for a 90-day period
- References, including contact information for at least three organizations for which the facilitator has provided strategic planning services; include one sample of a complete report that the facilitator has prepared for a similar project

Section V: Selection Criteria

Submitted proposals will be reviewed and evaluated by the Library Director and the Strategic Planning Committee that is comprised of members of the Library Board and Staff. Evaluation criteria will include:

- Responsiveness of the written proposal to the purpose and scope of the project
- Demonstrated knowledge, skills, and experience in conducting strategic planning projects for non-profit organizations, preferably public libraries
- Methodology for carrying out tasks in the scope of work
- Proposed fees
- Performance record
- Ability to meet deadlines and operate within budget
- Written and oral communication skills
- References

The Committee may, at its discretion, ask any of those responding to this RFP to make a brief presentation and answer questions posed by the Committee.

CIDL reserves the right to select a strategic planning consultant based directly on a proposal or to negotiate with one or more respondents.

CIDL reserves the right to reject any and all proposals.

CIDL reserves the right to cancel the award of contract at any time prior to the execution of the contract by both parties.

Respondents bear sole responsibility for costs incurred in the preparation and delivery of proposals. The library will not reimburse costs associated with the responses.

All information submitted shall be public record and subject to disclosure pursuant to the Michigan Freedom of Information Act.

No Library Board or Staff member shall respond to this RFP or have a financial interest in any proposal.

Section VI: Submission Information and Timeframe

“STRATEGIC PLAN PROPOSAL” must be in the subject line.

Respondents shall submit completed proposals to:

Julie Meredith, Director
Clarkston Independence District Library
6495 Clarkston Road
Clarkston, MI 48346

Electronic submissions should be sent to juliem@cidlibrary.org

Proposals are due by: October 6, 2023

Any requests for clarification of information in this RFP must be submitted in writing to the Library Director before the due date. Interpretations may be given orally or in writing, depending on the nature of the inquiry. An interpretation of this RFP given by anyone other than the Library Director shall be invalid.

The Strategic Planning Committee shall make a recommendation to the Library Board at its regular meeting on: November 13, 2023