



Burlington Public Library

166 East Jefferson Street, Burlington, Wisconsin 53105
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www.burlingtonlibrary.org



RFP for Strategic Planning

For: Interested Consultants
From: Burlington Public Library, Board of Trustees
Date: February 26, 2019
Re: Request for planning bids

Attached is a scope of work describing completion of a strategic plan for the Burlington Public Library. The Board of Trustees seeks a description of approach and cost to complete this important project.

The chief areas of expertise sought are generating community surveys and market research, **and** designing, creating and leading high-quality working sessions, the goal of which is to create the basis for a strategic plan. We also request that the consultant produce a summary of the session which can be readily crafted into the plan itself.

A scope of work for the consultant is attached. **Proposals are due by March 25, 2019.** Please include the following in your proposal: 1) A description of your/your firm's capacity and experience in this work, both generally and with libraries or comparable organizations; 2) A depiction of the approach you would take including detailed objectives; 3) A minimum of 3 references that we may consult on your previous work; 4) the estimated cost of your involvement.

In the interim, inquiries may be directed to the following:
Joe Davies, Director, Burlington Public Library
262-342-1130; jdavies@burlingtonlibrary.org

Materials should be sent c/o Joe Davies via email or mail to Burlington Public Library, 166 E. Jefferson St., Burlington, WI 53105. Face-to-face or telephone interviews may be conducted, so noting availability during early April would be helpful.

Additional Considerations:

- Burlington Public Library reserves the right to reject any or all proposals
- Burlington Public Library reserves the right to request clarification of information submitted and to request additional information from the firm(s).

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Planning Consultant Responsibilities

The role of the consultant is to support completion of a strategic plan by:

1) designing and facilitating the strategic planning process; 2) developing background information as needed; and, 3) leading working sessions that designs a strategic plan.

The desired consultant's duties are to:

- Work with the Library Director and the Library Board to design an appropriate process and complete a plan during Summer 2019, final timetable to be determined.
- Outline the format for staff and Board members to complete an environmental scan.
- Generate market research, observations, local interviews and employee engagement.
- Produce materials and tools for Library Board review and use in their planning efforts.
- Ensure that all agreed-upon timelines are met.
- Work with the Library Director and Library Board president to prepare for each meeting.
- Support the Library Board, working group, staff and others as necessary to complete task assignments.
- Facilitate portions of Library Board meetings as needed.
- Design & facilitate a day-long working session to solidify organizational decisions, during Summer 2019.
- Draft and edit a working session summary that could serve as a starting point for a draft plan.
- Support Library staff and/or Board Committee to produce a full draft plan for Board review and approval.
- Respond to and assist with any special requests related to the above duties.