



Request for Proposal: Strategic Plan for the Stratford Library Association

A. Objective

The Stratford Library Association of Stratford, CT seeks a consultant or firm to develop a comprehensive 5-year strategic plan for the Stratford Library. The plan will integrate community, the Town of Stratford, and Board feedback to arrive at a vision and action plan for the Library in the near and long-term.

B. Deadline for Receipt and maximum cost

Proposals must be received via email before 10:00 a.m. October 15, 2021. Proposals should be addressed to Sheri Szymanski, Executive Director, Stratford Library and emailed to sszymanski@stratfordlibrary.org. **Proposals with budgets that exceed \$34,999 will not be considered.**

C. Background

The Stratford Library Association (SLA) opened its doors in 1896, and as an Association Library, is the public library for Stratford, CT. The Library is governed by a 22-member Board comprised of 11 members appointed by the Stratford Town Council and 11 Life members who are appointed by fellow life members. The Stratford Library Association operates the Library. The Town of Stratford provides 90% of the annual budget of \$3.7 million, with the other 10% coming from endowment proceeds, fundraisers and gifts. The SLA and Town jointly own the premises.

The Library serves a diverse town of 52,355 persons. Based on the 2020 census, 62% of residents are White, 18% are Hispanic and 17% are Black. Further, 14% residents were born outside of the United States and 47 languages are spoken by students enrolled in the Stratford Public Schools (Spanish, Portuguese, Polish, Arabic and French-Creole being the most common). The median household income is \$79,480, with approximately half of all students eligible for free or reduced school nutrition programs.

The Library has a comparatively high (68%) total of resident library cardholders and prior to 2020, the SLA building averaged 750 visitors each day. The collection consists of nearly 130,000 physical items, with an annual circulation of 268,000. Downloadable books and media are growing in popularity, with 60,600 items borrowed last year.

The Library has 42 Staff members (16 Full-Time Equivalent). The current Library director started in February 2016. SLA is open 58 hours a week (October – May); closing 4 hours on Sundays during the summer months. Library programs are a high priority, and are a significant factor in driving traffic to the facility. Prior to the pandemic, more than 2,000 in person programs were offered, and

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attracted nearly 52,000 participants. In 2020-21, programs migrated to online and grab-n-go formats, and in person, programming is now being reintroduced.

The Library engaged the services of a consultant to produce a strategic plan in 2000, and has since conducted the planning process in house. The most recent plan was for 2017-20 and the previous plan ran from 2014-17. The Library has a relatively advanced data system, which will allow for statistical analysis of use.

D. Scope of Work

SLA is seeking a consultant/firm to perform the following:

1. Facilitate the strategic planning process using a methodology effective for public libraries and/or non-profit organizations.
2. Gather data through community research that focuses on Library users, non-users, and stakeholders – including Library Board and Staff – to identify needs and wants. Community input is a key component of this planning process and may include:
 - a. Public input sessions
 - b. Electronic survey with a purposive sample
 - c. Key Informant Interviews
 - d. Other methods as identified by the consultant/firm
3. Review the current mission statement and facilitate revisions if and as necessary.
4. Identify service priorities, goals, objectives and activities.
5. Write and present the strategic plan that will be communicated to the Library's stakeholders.

NOTE: Library Staff will provide logistical support for the strategic planning process, such as support for the scheduling of interviews, advertisement of public meetings, providing lists of donors, etc.

E. Deliverables

1. **Inception report** that will describe in detail the plan for data collection and include a detailed work plan. This will be due within 30 days of signing contract.
2. **Mid-term report** (approximately 6 weeks after inception report).
3. **Draft final report** the draft will be reviewed by the SLA's Strategic Planning Committee, 2021.
4. **Final report** that takes into consideration written feedback of the draft. The final report shall include:
 - a. An assessment of the Library's environment, including a SWOT analysis and quality of services, reputation, management and budget utilization as a non-profit.
 - b. Specification of the mission and core values of the organization.
 - i. Clearly defined priorities, goals, and objectives that are measurable and for which the Library will hold itself accountable.
 - ii. Specification of a built-in process of review, evaluation, and adjustments to the plan resulting from changes in the economic, demographic, or political climate.

All raw and summary data is to be delivered to SLA at the conclusion of the planning process. The Library will ultimately own all data. However, if confidentiality is being guaranteed to key informants and survey respondents, data provided to the SLA shall be stripped of any identifying information.

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F. Organizational Structure of Strategic Planning Process

The consultant/firm will be reporting to the Strategic Planning Sub-Committee of the SLA Board of Directors. The committee will act as a resource for the consultant/firm and reviewer of deliverables.

G. Proposal Content Requirements

1. A **cover letter** providing a brief description of the firm or individual, including name, address, phone number, and email of the principal contact person.
2. A **brief approach** that the consultant/firm will take to creating a strategic plan. This should include a description of the methodology, tasks, timeline, and estimated total amount of time that would be spent on the project.
3. A **description of the consultant(s)/firm**.
4. A **list and Curriculum Vitae/Resumes** of key personnel who would be involved in the process.
5. **Examples (include reports, if possible) from two prior similar engagements**, either with libraries or other non-profit/NGOs.
6. **Exclusions or exceptions**. Please note and explain any part of the proposal that is beyond the expertise of the consultant, or would be better handled by Library Staff.
7. **References and contact information for three (3) organizations** for which the consultant/firm has provided strategic planning or similar services.

H. RFP Standards and Selection Criteria

1. The Stratford Library Association 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 SLA Board or Staff member shall have financial interest in this proposal.
3. In cases of disputes over difference of opinions as to the services of the proposal, ***the decision of the Board of the Stratford Library Association shall be final.***
4. The SLA reserves the right to ask for clarification of a proposal and to make a selection based solely on the proposal or to negotiate further with one or more respondents.
5. The SLA reserves the right to reject any or all responses to the RFP, including incomplete ones.
6. The proposal will be evaluated by the SLA Sub-committee on the the following criteria:
 - a. Responsiveness of the written proposal to the purpose and scope of the project.
 - b. Demonstrated knowledge, skills, and experience in conduction strategic planning or similar projects for 501(c)(3) public libraries or other non-profits.
 - c. Methodology for carrying out tasks in the scope of the work.
 - d. **Lump-sum cost** to complete the work described.
 - e. Feedback from references.
7. The SLA may interview those short-listed.

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I. RFP and Planning Process Timeline

1. Proposals PDF and WORD must be received via email before 10:00 a.m. October 15, 2021.
2. All **questions** must be submitted via email to sszymanski@stratfordlibrary.org and received no later than September 30, 2021. Telephone inquiries will not be addressed. Answers will be provided by October 5, 2021 on www.stratfordlibrary.org/rfpupdates
3. The strategic planning process will begin no later than November 15, 2021.
4. An inception report must be submitted on or before December 1, 2021. A draft report/plan and executive summary are to be submitted to the Library Director three (3) weeks before the final deliverable date, no later than March 31, 2022.
5. The strategic planning process will conclude by April 30, 2022.