



Urbandale Public Library
Planning, Visioning, Marketing, Fundraising
Request for Proposal
July 27, 2017

A. Objective

The Urbandale Public Library (UPL) seeks a consultant to:

1. Develop a 3-5 year strategic plan.
2. Project a 10 year vision.
3. Create a public relations, communications, and marketing plan.
4. Increase fundraising.

B. Deadline for receipt

Proposals must be received via email before Tuesday, August 22, 2017. Proposals should be addressed to Julie Wells, Director, Urbandale Public Library and emailed to jwells@urbandale.org.

C. Inquiries

Inquiries must be made via email. Please address all inquiries to jwells@urbandale.org. Telephone inquiries will not be addressed. Answers will be provided within three business days. All questions must be received no later than Friday, August 11, 2017.

D. Background

UPL's priority is to offer a superior customer experience through first-class collections, programs, and services. The Library currently:

- Serves the 42,449 citizens of Urbandale, Iowa.
- Provides service to the Des Moines metro-area.
- Circulates an average of 588,000 items to 15,458 cardholders.
- Welcomes over 308,000 visitors yearly.
- Operates 7 days, 70 hours per week.
- Offers programs to over 28,000 attendees.
- Receives approximately 2.2 million in city, state, and Urbandale Public Library Foundation funding.
- Resides in a 56,000 square foot facility built in 2000.
- Employees 46 full and part time staff.

E. Scope of Work

Urbandale Public Library is seeking an experienced, professional consultant to lead a process to develop a vision and implementation plan for the future of the library as a vital resource for the leaders and citizens of the city of Urbandale. The scope of work shall include the following:

1. Create a long term (10 years or more) vision for how the library can be an increasingly vital resource for all of the citizens and businesses in Urbandale.
2. Creatively facilitate input sessions and data-gathering involving a cross-section of the entire community to ensure the vision is inclusive and comprehensive.
3. Develop a shorter-term 3-5 year strategic plan with a view to implement the long term vision.

4. Develop a public relations, communications, and marketing plan to create engagement and support of community leaders and all citizens in the strategic objectives and the vision of the library.
5. Provide benchmarks to measure the results of the plans and achievement of the objectives.
6. Develop a fundraising program to provide support for enhanced services, programs, and collections and to ensure future funding to implement the vision.
7. Provide an effective, reliable ongoing process for library staff and leadership to regularly review, re-evaluate and adjust the objectives and plans to remain aligned to new developments in any factors impacting the vision including technology, community needs, and financial resources.
8. Deliverables should also include:
 - a. An up-to-date community profile and identification of community markets.
 - b. An assessment of the library's environment, including evaluation of strengths and weaknesses, quality of services, reputation, management, budget, etc.
 - c. Specification of the mission and core values of the organization.
 - d. Clearly defined priorities, goals and objectives that are measureable and for which the library will hold itself accountable.

F. Proposal Content Requirements

1. A cover letter providing a brief description of the firm or individual and the name, address, telephone number, and email of the principal contact.
2. Executive summary of the highlights of the proposal, not to exceed one page 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 and 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, service, 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 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. Preferably, one of the three references is a public library or non-profit organization.

G. RFP Standards and Selection Criteria

1. UPL 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 UPL shall be final.

4. UPL 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. UPL reserves the right to reject any or all responses to this RFP.
6. The proposal will be evaluated by UPL and will include the following criteria:
 - a. Responsiveness of the written proposal to the purpose and scope of the project.
 - b. Demonstrated knowledge, skills, and experience in conducting strategic planning projects for public libraries.
 - c. Methodology and timeline for carrying out tasks in the scope of work.
 - d. Cost to complete the process.
 - e. Ability to meet deadlines and operate within budget.
 - f. Positive experience and success in strategic and library planning; satisfactory performance record (references).

H. RFP and Tentative Planning Process Timeline

1. Proposals must be received via email before August 22, 2017.
2. All questions must be received no later than August 11, 2017.
3. Consulting firm selected at the October 23, 2017 UPL board meeting.
4. Strategic planning process begins November 2017.
5. A draft report/plan and executive summary are to be submitted three weeks in advance of the project report due date.
6. Project report to be presented in person at the May 21, 2018 UPL board meeting.