



Sonoma County Library

Request for Proposal for Strategic Plan Facilitation

October 29, 2014

Brett Lear

Library Director

211 E Street

Santa Rosa, CA 95404

707-545-0831 x 1553

Submittals due on November 26, 2014

at

Sonoma County Library

Attention: Rebecca Forth

211 E Street

Santa Rosa, CA 95404

Request for Proposal
Strategic Planning Facilitation
Sonoma County Library
Santa Rosa, CA

Introduction

Sonoma County Library seeks a facilitator to guide the development a comprehensive, strategic plan for the library. The plan will be driven by community input and shaped by staff experience. The ideal candidate will facilitate a series of meetings, distilling themes and priorities from each, and will assist in shaping the final document. The plan will respond to a detailed demographic report created by the facilitator, and will address the implications of the proposed priorities and goals for the library's collections, technology, staffing, and facilities. It will also identify funding needs that correspond with priorities, goals, and objectives. The purpose of the strategic plan is to position the library to identify and respond to the needs and interests of the community that it serves, to engage library staff in the planning process, and to raise awareness of existing and potential library services and resources.

Library Background

Libraries in Sonoma County date back to the mid-19th century, but it was not until 1975 that the Sonoma County Library system was created. The Library consists of the Central Library, ten branches, and two rural stations. It encompasses three notable special collections, the Sonoma County Wine Library, the History and Genealogy Annex, and the Petaluma History Room.

Last year, the Library served almost two million visitors, circulated more than 3.5 million books, audiobooks, DVDs, and electronic resources, and answered more than 250,000 reference questions. In addition to reading and viewing materials, we offer public access computers, free wireless, story times for all ages, and a wide variety of children's, teen, and adult programs. Our newly-launched digital branch provides 24-hour a day access to resources and information and incorporates chat, text, and email reference services.

Jurisdiction and Funding

Funded primarily by property taxes, the Sonoma County Library—a Joint Powers Agreement Special District—serves the cities of Cloverdale, Healdsburg, Rohnert Park, Santa Rosa, Sebastopol, Sonoma, and the town of Windsor, as well as the unincorporated areas of the County.

The Sonoma County Library is governed by an eleven member, city-appointed Library Commission. The Commission is responsible for hiring the Director, approving the budget, and

for guiding the organization. The development of a strategic plan is a stated priority of the Commission during this fiscal year.

Project Description

Sonoma County Library is seeking a professional facilitator to:

- Oversee the strategic planning process by using a methodology effective for public libraries.
- Design an effective method for data gathering, synthesis, and presentation, including surveys, focus groups, and community meetings over a three month period. Preferred: community input process conducted in English and Spanish.
- Guide all stages of the strategic planning process, including meetings with stakeholders, library staff, library commissioners, the library director, and community members.
- Assist in the identification of service priorities, goals, objectives, and activities.
- Identify gaps between current library operations, resources, facilities, and staffing and the above priorities, goals, objectives, and activities.
- Employ industry-standard methods of data extraction and tools to assess demographics, market segments, and achievable outcomes at a deep level.

Our goal is a focused, agile process that will result in a working document within three to four months. The new strategic plan will guide the organization as we move toward a more modern, responsive service model and, pending the passage of a sales tax measure to benefit the library, develop and implement additional services to the community.

Scope of Work

Sonoma County Library seeks a data-driven foundation for the strategic planning process, combining existing library data collected at different levels of the organization. The successful proposal will demonstrate the ability to use data points available from marketing, consumer behavior, and demographic information in conjunction with library-collected statistics to synthesize a cohesive set of quantitative and qualitative descriptors.

The selected facilitator will use data collection methods that may include market analyses, phone and online surveys, ethnographic and observational research, and one-on-one interviews. Using data from the library as well as data collected through primary research to group library users into meaningful categories, the facilitator will provide information on groups or markets to identify unique behaviors, usage patterns, and incentives and barriers to library use. These descriptive categories will be presented to community participants and library staff to assist with the visioning and strategic planning process. The successful proposal will demonstrate fluency with presenting information in clear, easy-to-visualize formats.

The facilitator will gather input from key stakeholder groups, including senior management staff, management and line staff, library commissioners, and library support groups. Community information gathering will be a strong component in this process, and will include both selected community member meetings and open community forums. The input obtained during these meetings will be used to develop responsive priorities and goals, and will be presented by the facilitator to the Strategic Planning staff team.

Proposed Timeline

The Sonoma County Library requires a focused, fast development process to implement a living, community-responsive document. The project will begin by December 19, and will be completed in three to four months. The successful proposal will include a project management plan that can achieve a fully implemented strategic plan by April 30, 2015.

Selection Criteria

Proposals will be evaluated by Sonoma County Library staff on December 1, and preliminary interviews will be scheduled December 3 through 5. If necessary, secondary interviews will be scheduled December 8 through 10. Please reserve these dates, as there will be no alternate interview dates. Proposals will be evaluated on the following criteria:

- Relevant experience and success in strategic planning facilitation, including the level of satisfaction of current and past clients.
- Cost to complete the process. A cost itemization worksheet is attached.
- Demonstrated ability to meet deadlines and operate within budget.
- Prior experience working with both public and staff committees.
- Demonstrable facilitation and qualitative/quantitative integration skills.

Proposal Requirements

To be considered, proposals must include:

- Cover letter including a brief description of the firm or individual, as well as the name and contact information of the principal.
- Executive summary of the proposal, including purpose, outcomes, and key points on the timeline.
- List of any personnel involved in the process and their role and prior experience.
- Summary of the facilitator's qualifications and experience.
- Project plan that includes a description of the methodology, tasks, timeline, key dates.
- Schedule of costs to complete the project (please use attached worksheet). All costs associated with the project should be listed. Additional sheets may be attached.
- References of contact information of 3 or more current or previous clients for whom comparable work was completed.
- Samples of 2 or more executed strategic plans and related contact information (may overlap with above).
- Copy of your standard contract, if applicable.
- Additional documentation or information as the facilitator deems fit to assist Sonoma County Library in the selection process, including any exclusions, exceptions, or recommendations.

RFP Standards

Sonoma County Library

- Will not reimburse the costs of preparing proposals.
- Reserves the right to cancel the award of contract any time before the execution of the contract by both parties.
- Reserves the right to reject any or all responses to this Request for Proposal.
- Reserves the right to request clarification or additional information pertaining to the proposal.
- Reserves the right to final decision in cases of disputes over differences of opinion as to the services in the proposal.
- Responses to this RFP become the property of SCL and are subject to the California Public Records Act.

Request for Proposal Availability, Correspondence, and Submissions

This RFP will be posted on the Sonoma County Library website, sonomalibrary.org and may be distributed to individual facilitators and firms. Questions regarding this RFP must be submitted via email to rforth@sonoma.lib.ca.us.

The deadline for submitting questions is Wednesday, November 7, 2014 at 5 p.m. PST. Inquiries will only be received and answered by email. Questions and responses will be posted for all on the Sonoma County Library website at <http://sonomalibrary.org/node/20137> by 5 p.m. on Wednesday, November 12.

Respondents must submit one (1) original signature hard copy signed in blue ink, four (4) additional hard copies designated as copies, and one (1) electronic version (PDF) of the proposal on a flash drive by:

Wednesday, November 26, 2014

5 p.m. PST

to

Rebecca Forth

Sonoma County Library

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Santa Rosa, CA 95404