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East Greenbush Community Library

Strategic Planning Consultant Request for Proposals

Issued: November 7, 2022

A. Purpose of the Project

- The East Greenbush Community Library seeks an experienced, professional Consultant to develop a comprehensive 5-year strategic plan for the Library that includes a significant community engagement/research component. We are committed to undertaking a strategic process that will actively engage our organization in thinking about the future and planning for the sustainable delivery of the programs and services our community expects, and engaging library stakeholders through the process.
- The Consultant will conduct an evaluation of the existing facility, collections, programs, services, staffing, and digital presence; and provide recommendations for effective use of physical and digital spaces, collections, programs, services, and staffing to fully meet the changing needs of our community while taking advantage of existing infrastructures when possible.
- Recommendations will consider possible library needs for the next 5, 10, and 20 years but recognizes that the future is not predictive, and the library of the future is not deterministic. The plan will incorporate guiding principles of access, equity, efficiency, relations, sustainability, and results.
- Input gathered for the plan will come from stakeholders including staff and board members, constituent groups, and members of the larger East Greenbush and Schodack communities as well as previously published community growth patterns and demographics. It will be cognizant of the funding challenges and opportunities in the current environment. The plan will keep the library embedded in the community and build on the strengths and relationships within the community and will position the library to provide services in a cost-effective manner.
- The plan will:
 - Focus on strategic priorities for the next 5-years within the limitations of the annual budget,
 - Guide the library board and administration regarding library initiatives, future program, and service priorities,
 - Include measurable goals and objectives, suggested timelines, and benchmarks,
 - Address the implications of the proposed goals for the library's physical and digital collections, programming, technology, staffing, facilities, and funding requirements,
 - Seek to modernize, repurpose, reuse, and look for sustainable solutions,
 - Advocate for responsible use of the taxpayer's money while continuing to make the East Greenbush Community Library a destination by choice,
 - Offer the best service solutions for the future and create a positive environment for our community.



B. Background

- The East Greenbush Community Library is a Special District Public Library created by a special act of the New York State Legislature and vote of special district voters residing in the boundaries of the Town of East Greenbush in 1988.
- The Town of East Greenbush (population 16,748) covers 24 square miles and is situated in southwestern Rensselaer County along the eastern shore of the Hudson River, in the heart of the Capital Region, and borders the Towns of North Greenbush, Sand Lake, Schodack, and the City of Rensselaer.
- The Library shares a 39-tract of former farmland with the YMCA and Hawthorne Ridge, a multi-use senior housing complex, including joint ownership of Community Way (road).
- The Town has 8,856 households and offers historic neighborhoods, Hudson River Waterfront, rural and agricultural lands, recreational resources, top-rated schools, and has experienced commercial and residential growth over recent years. The town is poised to capitalize on the region's emergency as a technology hub with its proximity to the state capital, accessibility to major transportation routes, and availability of undeveloped land.
- The Library is a member of the Upper Hudson Library System (UHLS), a resource-sharing consortium consisting of 29 public libraries in Albany and Rensselaer Counties.
- The Library has the highest circulation per capita among UHLS libraries and has demonstrated a consistent presence of excellence in the community. In 2022, the Library has earned awards of excellence such as 2nd Place as Best Public Library in the Time Union's "Best of 2022" for the second year in a row, and UHLS's Adult Program of the Year for our "Pen to Pandemic" short story project.
- In 2021, the library was open 2,444 hours and captured 82,002 visits. 16,294 people attended 606 library programs.
- The Library has 21.8 Full-Time Equivalent (FTE) employees; of which 16 are full-time and 22 are part-time.
- East Greenbush Library District:
 - Library district taxpayers from the Town of East Greenbush will fund 80% of the 2023 budget through a tax levy (\$2,867,757).
- Town of Schodack Contract for Service:
 - In addition to the Library's chartered to serve area, the library provides library service to the Town of Schodack via contract for service, bringing the total number of patrons to nearly 30,000.
 - The 2023 contract for service amount is 14.5% of total Library budget

C. Scope of Work

- Facilitate the strategic planning process using a community engagement methodology/approach that is effective for public libraries, particularly those of comparable size.
- Collect, analyze, and report community demographic/segmentation information, including a one-page primer on the library and community that the library will provide.



- Determine what information needs to be gathered and gather data through community research that focuses on stakeholders to identify library needs/wants as well as ways to increase/sustain cardholder registration, library usage, and awareness of library services. Identify proposed process to engage stakeholders who represent the complexity and diversity of our community.
- Community input is a key component of this planning process. Identify proposed method(s) to engage community during data gathering stage.
- Surveys and other data gathering may need to be conducted in multiple languages. Please include costs for survey translation and other multi-language components.
- Facilitate planning meetings and public, board, management, and staff input sessions. To include, but not limited to:
 - Initial kickoff
 - Midpoint summarization
 - Final report
- Help the Library develop a vision for the community they will serve in 5-, 10-, and 20-years.
- Identify service priorities, goals, objectives, and activities for the library, including physical and digital spaces, that meet short and long-term community expectations.
- Write and present the strategic plan that will be communicated to the library's stakeholders. The final deliverable should address:
 - Community needs that that library services and facilities can meet,
 - Where the Library can have the greatest impact,
 - Opportunities for collaboration with community stakeholders,
 - An assessment of the library's environments, including evaluation of strengths and weaknesses, quality of services, reputation, management, facilities, digital presence, and budget,
 - Clearly defines priorities, goals, and objectives that are measurable and for which the library will hold itself accountable,
 - Include major requirements for implementation, measurement of progress, and administration of the plan, including identification of financial impact and possible source of funds,
 - The communications program to inform the community of the new plan and its prioritized service goals, objectives, strategies, and the primary reasons therefore, clearly, and concisely,
 - Specification of a built-in process of regular review, evaluation and adjustment to the plan resulting from changes in the economic, demographic, or political climate.
- Present the final report, including proposed final strategic plan, to the Library Board, staff, other stakeholders, and the public at large upon completion of the strategic plan.

D. Final Report

- A draft report/plan and executive summary are to be submitted to the Library Director three weeks in advance of the final deliverable due date.



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- The final written report should contain an executive summary, an explanation of the strategic planning process, and all collected data as appendices. All files, records, documents, and similar items relating to the business of the East Greenbush Community Library, whether prepared or received by the Consultant for purposes of this engagement, are and shall remain the exclusive property of the East Greenbush Community Library. A presentation of the final strategic plan shall be made to the Library Director and Library Board at a Library Board Meeting.

E. Selection Criteria

The East Greenbush Community Library is seeking a consultant to provide the services outlined above. All proposals meeting the RFP requirements will be evaluated considering the following criteria among other factors:

- Responsiveness of the written proposal to the purpose and scope of the project.
- Demonstrated knowledge, skills, experience, and success in satisfying library clients in the performance of comparable strategic planning projects for public libraries.
- Methodology and timeline for carrying out tasks in the scope of work.
- Proposed price and terms and conditions of the offer. Include cost for options and add-ons.
- A record of cost efficiency, meeting deadlines, staying within budget, and delivering a product that meets or exceeds library clients' expectations.
- Ability to meet deadlines and operate within budget.
- Responses will be evaluated by the Executive Director and Strategic Planning Committee, who will present their recommendation to the Board. Interviews may also be scheduled as part of the process.

F. Proposal Format and Submission

The proposal shall include:

- A cover letter providing a brief description of the firm or individual, name, address of consultant, telephone number, and email of principal contact person.
- Executive summary of the highlights of the proposal, not to exceed two pages in length, and conveying the consultant's understanding of the purpose and expected outcomes of the project.
- Identification of the project manager and key personnel who would be involved in the process and their expertise/experience. Identification of their project roles estimated percentage of project time associated with each of the identified personnel and relevant qualifications and experience.
- A list of any additional consultants or third-party vendors that you propose to hire to supplement your firm's services, including names and relevant experience.
- A summary of the consulting firm's qualifications and relevant experience. The successful firm and their subcontractors will have demonstrated expertise in strategic planning, community engagement, and using remote collaborative software to conduct strategic planning focus groups.



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- A work plan that includes a description of the methodology, tasks, timeline, milestones and estimated total amount of time that would be spent on the project. Responses that fail to include a timeline will not be considered.
- Identification of supporting content/materials and formats that will be provided for internal and public communications.
- Exclusions or exceptions. Note any parts of the proposal that is beyond the expertise of the consultant or would be better handled by local library staff.
- A schedule of costs that includes consulting, supplies, number of onsite visits and cost per trip, number of virtual meetings and cost per virtual meeting and other costs associated with the planning process. Costs for data gathering and analysis (community research component) and/or community survey must be listed separately.
- References and contact information for at least one, but preferably three organizations for which the facilitator has provided strategic planning services.
- Sample material such as a strategic plan document.
- Disclosure of any past, current, or potential litigation or administrative proceedings relating to projects managed by the Consultant.

G. Questions and Bid Date

- All questions regarding this RFP are to be directed in writing to the Library Director at director@eglibrary.org by noon on Wednesday, December 7, 2022. Telephone inquiries will not be addressed.
- Proposals are due no later than noon on Friday, December 9, 2022. Proposals must be submitted electronically to: Jill Dugas Hughes, Library Director at director@eglibrary.org. Include "Strategic Plan RFP Proposal" in the subject line of the email. In-person, mail, or fax proposals will not be accepted. It is the respondent's responsibility to ensure the proposals are received by the deadline. Proposals received after the deadline will not be considered.

H. Selection Process

- Respondents submitting proposals may be invited to participate in a virtual interview with the Library Director and one or more members of the Library Board. The Library Director, with the assistance of a Committee of the Library Board, will evaluate the proposals, consult with references, and make a recommendation to the Library Board. Following its deliberations and determination, a contract may be prepared and executed if acceptable to the library Director and the Library Board.
- The Library will make its award based on a quality-based selection process with price being only one of the factors that will be considered. The Library reserves the right to award a contract (subject to finalizing a mutually acceptable agreement which the parties will execute), reject any and all responses to this RFP in its sole discretion, cancel the award of a contract any time before the execution of the contract by both parties and waive or modify any provisions of this RFP or cancel the RFP in part or whole.



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- The RFP does not obligate the Library to award a contract, to pay any costs incurred in the preparation of a proposal for this RFP, or to procure or contract for any services. The Library and Consultant may agree to add additional areas to the contract by mutual agreement at a later date. The Library may elect to stop work at any time in the contract and will pay for work completed to that point on a time and material basis. The Library also reserves the right to amend the RFP, as necessary. All proposal and materials submitted will become property of the Library.
- The responding consultants bear sole risk and responsibility for costs incurred in the preparation of the proposal. No library board or staff member shall have any financial interest in any Consultant, proposal, or contract submitted or awarded pursuant to this RFP. Any potential conflicts of interest shall be disclosed.
- The East Greenbush Community Library 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.
- In cases of disputes over differences of opinions as to the services in the proposal, the decision of East Greenbush Community Library shall be final.

I. Contract Award Date

- Consulting firm selected and confirmed at or before January 17, 2023, East Greenbush Community Library Board Meeting.