



REQUEST FOR PROPOSAL (RFP)
STRATEGIC PLANNING FACILITATOR

BURNHAM MEMORIAL LIBRARY

898 MAIN STREET

COLCHESTER, VT 05446

August 31, 2022

Introduction

The Burnham Memorial Library is seeking consultant services to assist the Board, Staff, and Community in developing a comprehensive strategic plan. The plan will include a mission statement, goals, measurable objectives, and proposed activities to meet community needs for the next five years (2023-2027). It will examine our community's growth patterns and demographics, and identify the need for service with respect to future trends and technologies. It will also identify funding needs to respond to service demands.

Plan objectives:

- Ensure that Library services and resources are in line with user needs and expectations
- Boost visibility, awareness, and patronage among residents—how does the library remain relevant as a place, after COVID
- Become better recognized as a community partner organization, especially in assisting New Americans
- Create a strategic plan that stakeholders are supportive and aware of, that outlines service goals, resident desires, and is in conjunction with the Town of Colchester Heritage Plan
- Ensure long-term financial viability

Background

In 1939, Mrs. Etta Burnham, resident of Colchester, left most of her estate to build a public library for the Town of Colchester. The Library opened its doors in 1942 to a new brick building on the green, in what is considered the Village; a large addition to the building was completed in 1989 under the direction of Mrs. Carolyn Barnes and currently stands as a 7,790 square foot facility on Main Street in the Town of Colchester. The Library carries a collection of approximately 50,000 items, is advised by a five-member elected Board of Trustees, has permanent staff of 8 staff members (7.5 FTE), and prior to COVID was open 47 hours per week. The Library operates on a municipal budget of \$776,401 (FY22). The building occupies two floors: the main level houses the adult collection, the main service desk, 5 computer stations for the public, and the original wood paneled library building with a gas fireplace. The lower level houses the Youth Services Department and a separate room for teens. The lower level has a large story area and 6 computer workstations.

Library Director Kelly L. McCagg was hired by the Board in July 2013.

In 2017 the Library took over stewardship of the Meeting House, located next door. The main floor can hold nearly 100 people for programs or community meetings. The lower level, remodeled in 2018 thanks to a generous bequest, features a small kitchenette area, as well as room for programs or meetings.

Current Library Mission Statement: The Burnham Memorial Library is an integral part of Colchester Town Government, providing a trusted and essential public service; bringing together people of all ages to connect them to information, learning, and life-long enrichment. The goal of all library programs and services is the building and strengthening of community.

Community

The Town of Colchester is a geographically dispersed community located immediately north of Burlington, VT. Colchester extends out over 36.9 square miles with six distinct communities: Colchester Village, Clay Point, Severance Corners, Water Tower Hill, Fort Ethan Allen with nearby Saint Michael's College, and the Malletts Bay area. The high school, middle school, and one elementary school as well as the Town Hall are located in the bay area. The population of Colchester is estimated to be 17,524 in 2020, with the average age being 36.5 years. There are 484 people per square mile.

The need arose for a consistent vision for the Town's future and to determine how best to integrate Colchester into the evolving regional, national, and international economy. The Colchester Heritage Committee was formed in 2010 and in 2012 the Town undertook the development of a broad strategic plan: The Heritage Project. Its Vision: "Colchester, Vermont located on Lake Champlain's Malletts Bay is a diverse, civic-minded community endowed with a rich heritage of commercial, agricultural, recreational, and educational gifts. Proud of the quality of life already enjoyed here, the people of Colchester seek to build upon this foundation to ensure economic prosperity, recreational opportunity, and an entrepreneurial spirit for future generations."

<https://colchestervt.gov/DocumentCenter/View/949/The-Heritage-Project---Community-Strategic-Plan-2012-2022?bidId>

The mission of the Town of Colchester is to provide to its citizens the highest quality municipal services possible with the resources available. With that in mind, a comprehensive municipal development plan was approved in 2019.

<https://colchestervt.gov/DocumentCenter/View/5975/2019-Town-Plan-ISSUU>

Project Scope

The Burnham Memorial Library is seeking an experienced, professional facilitator to perform the following:

- Facilitate the strategic planning process using a methodology effective for public libraries
- Gather data through community research that focuses on library users, non-users, and stakeholders to identify needs over the next five year period
- Facilitate planning meetings and public input sessions
- Assist with the identifying of service priorities, goals, objectives, and activities
- Identify gaps where current Library operations are insufficient to meet those service priorities
- Keep the process as cost-effective as possible
- Write and present the strategic plan that will be communicated to the Library's stakeholders

The proposed plan should include, but not be limited to:

- A review of current trends in library service and technology and an analysis of user expectations in regard to those trends
- Specifications of guiding principles or core values of the organization and clearly defined, meaningful priorities, goals, and objectives that are measurable and for which the Library will hold itself accountable
- Recommendations for improvements to services, collection, technology, marketing, and facility configuration
- Specifications of a built-in process of regular review, evaluation, and adjustment to the plan resulting from changes in the economic, demographic, or political climate
- Recommendations for establishment of a mechanism for regular evaluation of customer needs, concerns, and satisfaction with services

Proposal Content Requirement

Proposals must include the following elements:

- 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, which should not exceed one page in length, but convey the facilitator's understanding of the purpose and expected outcomes of this project
- A summary of the facilitator's qualifications and relevant experience; the facilitator must possess knowledge of modern public library services, trends, and functions
- A work plan that contains a description of the methodology, tasks, timeline, and an estimate of the amount of time that would be spent on the project
- Note any part of the proposal that is beyond the expertise of the facilitator or better left to Library staff
- Provide an estimate of the number of facilitator hours to be provided and the rate per hour
- Contact information for five or more organizations for which the facilitator has provided strategic planning services, and one sample of a complete report which the facilitator prepared for a similar project

Selection Criteria

The proposals will be reviewed by the Library Director and Library Board. Criteria for evaluation will include:

- Responsiveness of the written proposal to the purpose and scope of the project
- Demonstrated knowledge, skills, and experience in conducting strategic planning projects for public libraries
- Methodology for carrying out the tasks in the scope of the work
- Reasonable proposed fees
- Satisfactory performance record
- Ability to meet deadlines and operate within a budget
- Excellent written and oral communication skills

The Burnham Memorial Library reserves the right to select a strategic planning facilitator based directly on the proposal or to negotiate with one or more respondents.

The Burnham Memorial Library reserves the right to reject any/all proposals.

The Burnham Memorial Library will not reimburse costs of preparing the RFP responses. The Library reserves the right to cancel the award of contract at any time prior to the execution of the contract by both parties. The responding consultants bear sole risk and responsibility for costs incurred in the preparation and mailing of the proposal.

Following the entrance of a contract with a facilitator and the announcement of a selected proposal, the proposal shall become disclosable under the Vermont Public Records Act.

Submission Information and Timeframe

Respondents must submit one (1) original and three (3) copies of the completed proposal to:

Kelly L. McCagg, Director 898 Main Street Colchester, VT 05446

Proposals are due by September 30, 2022 by 4:00pm EST and shall be submitted in a sealed envelope marked with the name and address of the consultant and STRATEGIC PLAN BID PROPOSAL.

Electronic submission is also acceptable. Proposals may be emailed to kmccagg@colchestervt.gov.

A contract will be awarded on or before October 14, 2022. The Burnham Memorial Library reserves the right to reject any/all proposals without penalty.

A draft plan and executive summary are to be submitted to the Library Director by May 2023. The facilitator shall provide one unbound original and 5 copies of the draft report.

The final strategic plan and executive summary are to be submitted by June 9, 2023. The facilitator will provide one unbound original and 5 copies of the final report. A copy of the final report must also be provided electronically.

All raw and summary data is to be delivered to the Burnham Memorial Library at the conclusion of the strategic planning process.