



PENTICTON
PUBLIC LIBRARY

**Penticton Public Library
Request for Proposal**

Development of Strategic Plan

Date of Solicitation: February 6, 2019
Closing: February 20, 2019

Send proposals to the attention of:

Heather Buzzell
Chief Librarian
250-770-7784
hbuzzell@summer.com

Submissions must be emailed in pdf form with the subject "2019 RFP PPL Strategic Plan"

Submissions will not be opened in public.

It is the sole responsibility of the proponent to check the Library's website at www.pentictonlibrary.ca for any updated information and addenda issued before the closing date. This is **not** a City of Penticton Request for Proposal.

Purpose of this RFP

The Penticton Public Library seeks a consultant to assist in the development of a comprehensive 3- to 5-year strategic plan for the library that includes a significant community research component.

Organizational Overview

For over 100 years the Penticton Public Library has been serving the city of Penticton. PPL is a single branch independent municipal library. Today we are one of the busiest libraries in the Okanagan Valley, with an average 4,700 visitors each week. More than 18,000 residents of Penticton are active library users. We have an extensive physical collection of over 100,000 items further enhanced by a digital collection of e-books, downloadable audio books and magazines, as well as streaming movies and documentaries. The library offers a wide range of regular programs for all ages, with additional special event programs, such as author readings, occurring several times a year.

Penticton Public Library has a \$1.3 million annual budget which is 80% funded by the City of Penticton. We operate in a shared facility with the Penticton Museum & Archives and underwent a renovation of our space in 2013. Penticton Public Library has just over 1,200 square meters of space and employs 24 staff.

We believe our next great challenge is to maximize the community investment in our library by identifying and envisioning what matters most to them, and ensuring that the public library does its best at answering that call. We are looking for help to refine and create a strategic plan that will push this goal forward.

Last Strategic Plan done at Penticton Public Library

Guided by the 2015-2018 strategic plan the Library rebranded, saw the development of a marketing plan, has seen an increase in visitors and circulations (both physically and digitally), and refined the work done behind the scenes in our technical services department. We have introduced technology based programming and public services, revised our policies and procedures to be patron focused, and enhanced our digital content. Many of the strategic directions of the 2015-2018 were broadly ambitious and are likely to remain relevant in the refresh of the Library's Strategic Plan.

Preliminary Schedule

| | |
|-------------------------------------|-------------------|
| Library issues RFP | February 6, 2019 |
| Proposals are due | February 20, 2019 |
| Proposal evaluations completed | February 25, 2019 |
| Recommendation to the Library Board | February 27, 2019 |
| Notification of selected RFP | February 28, 2019 |
| Work to begin no later than | April 1, 2019 |
| Project completion | July 31, 2019 |

Scope of work

The Penticton Public Library is seeking an experienced, professional facilitator to perform the following, with the assistance of library staff:

- 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—including Library Board and staff—to identify library needs and wants, as well as ways to increase library usage and cardholder registration. Community input is a key component of this planning process and may include:
 - Focus groups/individual interviews/public input sessions
 - Online survey
 - Phone interviews
 - Other methods as identified by the consultant
 - Please include suggestions for handling research in your proposal
- Facilitate planning meetings and input sessions (public, board, and staff sessions)
- Review the current mission statement and facilitate revisions, and create a core values statement
- Identify service priorities, goals, objectives, and activities
- Write and present the strategic plan that will be communicated to the library's stakeholders
- All raw and summary data is to be delivered to Penticton Public Library at the conclusion of the planning process

Scope of services

- Analysis of current library strategic plan and services
- Connection with stakeholders
- Delivery of a strategic plan July 31, 2019

Project deliverables

- An up-to-date community profile and identification of community markets
- An assessment of the library's environment, including evaluation of strengths and weaknesses, quality of services, reputation, management, and budget, etc.
- Specification of the mission and core values of the organization
- Clearly defined priorities, goals, and objectives that are measurable and for which the library will hold itself accountable
- Specification of a built-in process of regular review, evaluation, and adjustments to the plan resulting from changes in the economic, demographic, or political climate

Parties and Process

- The selected proponent will report directly to the Chief Librarian or designee
- The stakeholders for this project include the Chief Librarian, senior library staff, the Library Board and various representatives of the staff as needed
- Format will include both in-person meetings and online communications

Content of Proposal

Proposals must be submitted in pdf form via email. The following topics should be addressed:

Covering letter

A covering letter signed by the individual or authorized representative should be provided outlining the intent of the response and stating that the information contained in the response accurately describes the services to be provided. The response must also guarantee that all quoted prices will be honoured for a minimum of 30 days from the submission date.

Proponent profile and reference

Proponents should include understanding of the project requirements and, based on that understanding outline key success factors and challenges for the project.

Proponents shall provide information to illustrate their experience. This should include, but is not limited to:

- Experience in and/or understanding of library (or similar) services and why they matter to a community
- Experience in developing and delivering strategies similar to the subject of this RFP

At least three (3) references (as appendices) should be provided including name, telephone number and email address. If there are special concerns or restrictions on our use of the references, the concerns must be addressed in the proposal.

Submission Requirements

The proposal should be a maximum of 8 pages, excluding appendices and references, including the following:

- Summary of the project requirements
- Project team and role
- Summary of work plan, including all primary tasks required to fulfill the project requirements.
- Deliverables and anticipated objectives
- Approach to reach consensus on project with the Penticton Public Library stakeholders
- Other information relevant to the project, or anything else the Proponent considers would add value to the project
- List of similar projects completed. Summarized with examples

Fees

The successful proponent will be responsible for all costs and expenses during the project. A budget that reflects a firm price of up to \$5,000, in Canadian funds and including all applicable taxes, must be part of the proposal to complete all requirements of this project. Identify any assumptions.