



Strategic Planning Request for Proposal JANUARY 20, 2023

Objective

The Waukegan Public Library District seeks a culturally competent consultant to collaborate with us to develop a comprehensive strategic plan for the library, so that we may better serve our vibrant and diverse community and realize the library's full potential to have a positive impact in the lives of residents of all ages, backgrounds, needs, and abilities.

Deadline for Receipt

Proposals must be received via email by February 22, 2023.

Proposals may be addressed to Tiffany Verzani, Executive Director, Waukegan Public Library and should be emailed to tiffanyverzani@waukeganpl.info.

Inquiries

Inquiries must be made via email. Please address all inquiries to: tiffanyverzani@waukeganpl.info. Telephone inquiries will not be addressed.

Questions will be addressed within five business days. All questions must be received no later than February 15, 2023.

Community Profile

Centered between Chicago and Milwaukee at the northeast corner of Illinois, Waukegan is the County Seat of Lake County and the 10th largest City in Illinois. The city is special in that it offers a diversity of cultures, religions, and ethnic heritages; downtown and historic districts that sit along the lakefront; an award-winning park district and educational institutions; easy access to major transportation systems; engaged social and civic organizations; active business and revitalization supports; a strong history of literary, fine art, and performing arts; and some of the most picturesque residential areas in Northern Illinois.

- Waukegan Public Library has a strong record of service and support to the community, particularly as it impacts education and literacy, digital access, and outreach activities. The library has an award-winning Early Learning Center, an Education & Literacy department focused on digital, health, and basic adult literacy, classes that promote citizenship, the arts, and children's programming, active Friends and Foundation groups, and dedicated staff and

board members – many of whom grew up or live in Waukegan. The Library is in downtown Waukegan in a 1968 building that has had some remodeling, has a small branch located in a Park District athletic center, and an outreach van that is being reimagined for new services.

- Educational Institutions - Waukegan Community Unit School District 60 serves 17,000 preschool through 12th grade students in 23 buildings. There are many private and parochial schools in Waukegan, as well as a burgeoning new campus for the College of Lake County.
- Active social, civic, health, family, and career support agencies are in Waukegan proper and throughout Lake County. Organizations who have partnered with the library include Youth Build, Boys & Girls Club, Josselyn Center, Goodwill Great Lakes, Connect Waukegan, Mano a Mano Family Services, the Lake County Health Department, HACES, and the Lake County Nature Network. Lake County also boasts very engaged elected officials who host listening sessions and town halls, are present at community events, host job fairs, and help connect community partners. Several private foundations, Lake County Community Foundation, corporate philanthropy, and governmental granting agencies have a strong presence in Waukegan.
- The Waukegan Park District is a Gold Medal winning Park District that manages fifty properties, provides a full range of activities for all ages, and sponsors the Waukegan Symphony Orchestra and concert Chorus.
- Art, music, literature, and local history have important roles in the life of residents. Waukegan was the childhood home of Jack Benny and Ray Bradbury – with Bradbury’s Greentown being modeled after Waukegan. The Waukegan Arts Council, Art Wauk events, art galleries, local muralists, and the Genesee Theater all work to increase cultural and entertainment options and attract new visitors to the city. The Waukegan Historical Society works from several historic structures and provides access to documents and photos for researchers and enthusiasts.
- The Waukegan Municipal Beach’s 400-acre lakefront and mile-long beach and Waukegan National Airport offer options for business and recreational activities, while the Great Lakes Naval Station is the Navy’s largest training center and home of the Navy’s only Boot Camp.
- The City of Waukegan is currently developing a strategic plan in partnership with Northern Illinois University, as well as focusing on economic redevelopment, infrastructure improvements, and opening of a casino in 2025 (temporary location currently open).

Demographics

The Waukegan Public Library serves the residents of the City of Waukegan, with a population of 89,321 and 29,981 households, according to 2020 U.S. Census data. 25% of the population is under 18 and 10% is over 65 years old. 72.1% of Waukegan’s working age population is in the workforce, compared to 65.1% in Illinois as a whole.

Waukegan is diverse by any measure. 53.4% of the population identifies as Hispanic or Latino, 18.8% as non-Hispanic white, 18.8% as African American, and 6.6% as Asian. 53% of households speak a language other than English at home. 30.2% of Waukegan residents are foreign-born. 76.8% of adults have a high school diploma and 16.9% have a bachelor’s degree or higher. Median household income is \$58,844, below the \$72,563 average household income across Illinois. 15.1% of Waukegan’s population meets federal poverty guidelines, and 16.4% of the population does not have health insurance.

Scope of Work

WPL is seeking an experienced professional to facilitate the strategic planning process using a methodology effective for public libraries; to gather data through community research; to conduct an environmental analysis with key stakeholders; to fully utilize community information already at the libraries or city's disposal; and to engage all stakeholders to design a plan that helps the library serve the community. In particular, the library would like to connect with our underserved population, remove barriers to service, and what changes or improvements are needed to facilities, spaces, policies, services, collections, and staffing to successfully implement the strategic plan.

Community input is critical, and every component must include access for Spanish speakers. Use of a third-party consultant for EDI conversations and evaluation, or a research firm for demographic research or surveying, is acceptable. Fees and recommended firms should be included in the proposal.

WPL's process priorities include:

- A comprehensive timeline of activities that includes
 - Regular planning meetings with administration and the board's strategic plan committee
 - Robust board and staff participation
 - Engaging and interactive community conversations that includes focus groups with specific demographics (parents, teens, seniors, stakeholders, community partners), as well as online, print, or phone surveys as appropriate. All such activities should be in English and Spanish.
- Review and revision of the current mission and vision statement
- Identification of top-level service priorities/initiatives and next-level goals
- Identification of core values statement

Deliverables

1. Write and present the strategic plan that will be communicated to the library board, staff, and stakeholders.
2. A comprehensive demographic and geographic analysis of our service area.
3. Qualitative and quantitative survey and focus group results, including charts, graphs, quotes, and stories that serve to illuminate the needs and interests of the community.
4. An assessment of the library's internal competencies, including a clear-eyed evaluation of strengths and weaknesses, services, reputation, management, and budget, etc.

5. A statement of vision, mission, and core values that reflects the library and the unique community we serve.
6. Clearly defined top-level service priorities and next-level goals for which the library can hold itself accountable.
7. Specification of a measurement/assessment tool or framework.
8. 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.
9. All raw and summary data is to be delivered to WPL at the conclusion of the planning process.

Proposal Content Requirements

1. A cover letter providing a brief description of the firm or individual; name; contact information (email and phone) for the principal person.
2. 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.
3. A list of key personnel who would be involved in the process and their expertise/experience.
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, services, 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 timetable will not be considered.
6. 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.
7. Exclusions or exceptions. Note any parts of the proposal that are beyond the expertise of the consultant or would be better managed by local library staff.
8. References and contact information for three organizations for which the firm or individual has provided strategic planning services. References for one of the three being a public library.

RFP Standards and Selection Criteria

WPL reserves the right to cancel the award of contract at 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.

No library board or staff member shall have a financial interest in this proposal.

In cases of disputes over differences of opinions as to the services in the proposal, the decision of WPL shall be final.

WPL 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.

WPL reserves the right to reject any or all responses to this RFP.

The proposal will be evaluated by WPL and will include the following criteria:

- Responsiveness of the written proposal to the purpose and scope of the project
- Demonstrated knowledge, skills, and experience conducting strategic planning projects
- Methodology and timeline for conducting tasks in the scope of work
- Cost
- Ability to meet deadlines and operate within budget
- Positive experience and success in strategic planning

RFP and Planning Process Timeline

Proposals must be received via email by February 22, 2023.

All questions must be received no later than February 15, 2023.

Consultant interviews will be scheduled for February and March 2023 and may be done virtually.

Consulting firm will be selected and confirmed at the March 15, 2023, Library Board meeting.

The strategic planning process will begin by April 2023.

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

Final deliverable to be presented at the upon a mutually agreed upon time, no later than the October 4, 2023, Committee of the Whole meeting.