



610 Woodmere Avenue  
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**REQUEST FOR PROPOSALS**  
**STRATEGIC PLANNING CONSULTANT FOR THE**  
**TRAVERSE AREA DISTRICT LIBRARY**

**Date issued:** November 7, 2024  
**Proposals due:** November 27, 2024

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## REQUEST FOR PROPOSALS

### SECTION I: INTRODUCTION

The Traverse Area District Library (TADL) is seeking consultant services to assist the Library Board, staff, and community in developing a comprehensive strategic plan. The plan will include priorities, goals, measurable objectives, timelines, and proposed activities to meet expressed community needs for library service over the next three to five years.

### SECTION II: BACKGROUND

TADL is a Class VI library located in Traverse City, Michigan. The library services the residents of Grand Traverse County and three contractual townships including Inland, Almira (Benzie County) and Elmwood (Leelanau County). The official service population as verified by the Library of Michigan is 106,726. TADL is comprised of the main library on Woodmere Avenue, two branch libraries (East Bay Branch Library and Kingsley branch library), and three member libraries who each have their own director and board (Fife Lake Public Library, Interlochen Public Library, and Peninsula Community Library).

The library is an independent taxing authority governed by a seven-member appointed Board of Trustees. The Trustees are appointed by Grand Traverse County Commissioners (5 appointments) and the City of Traverse City Commissioners (2 appointments). The trustees serve 4-year terms. Tax revenue is collected from one millage voted on and passed in 2024 and expires in 2033. Tax revenue comprises approximately 95% of the library's \$8.4 million operating budget.

The Friends of TADL are an independent group of local residents and library users who are dedicated volunteers who support the library. The Friends are a non-profit organization that provides additional financial support to the library in excess of what is provided by the general library budget.

The Library currently employs 78 (seventy-eight) staff members with forty-three of them being full-time and the remainder being part-time employees.

TADL provides a wide array of programs for all ages, including a Summer Reading Program that grows in popularity each year. The library also offers traditional services such as copiers, public computers, test proctoring, and notary services, as well as innovative items such as a Library of Things, seed library, music streaming, and 3D printing and scanning.

The library's full mission statement is:

*The Traverse Area District Library (TADL) mission is to: promote literacy, facilitate lifelong learning, stimulate intellectual curiosity, and nurture personal enrichment*

### SECTION III: PROJECT SCOPE

The TADL seeks an experienced professional to:

- Design and facilitate a strategic planning process that is effective for public libraries and will:
  - Gather data on and from library users, non-users, and stakeholders
  - Create an up-to-date community profile and identify community markets
  - Assess the library's environment, including peer comparisons to other libraries of

- similar size and service population
- Review current trends in library service and technology and analyze user expectations regarding those trends
- Identify service priorities and needs
- Identify and address gaps between current library operations and service priorities
- Recommend measurable objectives and goals
- Define timelines and benchmarks for progressing
- Make recommendations for moving the library forward with short-term and long-term options
- Facilitate planning meetings and public input sessions
- Write and present findings and recommendations for moving the library forward to library stakeholders
- Prepare a final version of the strategic plan, including goals, objectives, and strategies

#### **SECTION IV: PROPOSAL CONTENT REQUIREMENTS**

- Cover letter providing a brief description of the firm or individual, name, address of consultant, telephone number, and email of the principal contact person
- Executive summary of the highlights of the proposal
- Summary of the consultant's qualifications and relevant experience, along with a list of key personnel who would be involved in the process, with a description of their backgrounds and areas of expertise
- 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
- Project budget that includes consulting costs, clerical costs, and data analysis costs; estimate the number of facilitator hours to be provided and the rate per hour; indicate a "not to exceed" total cost
- Signature by an individual authorized to bind the proposer, with a statement that the proposal is a firm offer for a 90-day period
- References, including contact information for at least three organizations (ideally public libraries of similar or larger size) for which the facilitator has provided strategic planning services; include one sample of a complete report that the facilitator has prepared for a similar project

#### **SECTION V: SELECTION CRITERIA**

Submitted proposals will be reviewed and evaluated by the Library Director and the Finance and Facilities Committee which is comprised of members of the Library Board. Evaluation criteria 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 non-profit organizations, preferably public libraries
- Methodology for carrying out tasks in the scope of work
- Proposed fees
- Performance record
- Ability to meet deadlines and operate within budget
- Written and oral communication skills
- References

The committee may, at its discretion, ask any of those responding to this RFP to make a brief presentation



and answer questions from the committee.

TADL reserves the right to select a strategic planning consultant based directly on a proposal or to negotiate with one or more respondents.

TADL reserves the right to reject any and all proposals.

TADL reserves the right to cancel the award of the contract at any time prior to the execution of the contract by both parties.

Respondents bear sole responsibility for costs incurred in the preparation and delivery of proposals. The library will not reimburse costs associated with the responses.

All information submitted shall be public record and subject to disclosure under the Michigan Freedom of Information Act.

No Library Board member or staff member shall respond to this RFP or have a financial interest in any proposal.

## **SECTION VI: SUBMISSION INFORMATION AND TIMEFRAME**

You may submit a proposal either via email or hard copy.

Electronic submissions should be sent to [mhoward@tadl.org](mailto:mhoward@tadl.org), "Strategic Plan Proposal" must be in the subject line. Respondents shall submit

Hard copies should be submitted to  
Michele P. Howard, Library Director  
Traverse Area District Library  
610 Woodmere Ave Traverse City, MI 49686

All copies must be received by 4 pm November 27, 2024. Late proposals will not be considered.

Any requests for clarification of information in this RFP must be submitted to the Library Director before the due date. Interpretations may be given orally or in writing depending on the nature of the inquiry. An interpretation of this RFP given by anyone other than the Library Director shall be invalid.

The Director and Finance and Facilities Committee shall make a recommendation to the Library Board at its regular meeting on Thursday, December 12, 2024.

### **Anticipated Timeline:**

November 1, 2024: RFP distributed

November 27, 2024 at 4:00 pm: Proposals due

December 3, 2024: Initial review of received proposals with Finance and Facilities Committee

December 4-12, 2024: Follow-up and interviews with selected groups

December 12, 2024: Final selection at Regular Library Board Meeting Winter

2025: Work to commence