March 6, 2000

To Whom it May Concern:

The Essex Library Association is embarking upon an ambitious strategic planning process. The recently formed Planning and Development Committee is soliciting proposals from qualified consultants interested in assisting us with this project.

A Request for Proposal document is enclosed, along with some supporting documentation about the Planning Committee and the library. A bibliographic citation for the standard public library planning guide, *Planning for Results: A Public Library Transformation Process*, is also included for those consultants unfamiliar with library strategic planning. While we anticipate using this guidebook as a reference and model for our planning, although other planning models may be incorporated as necessary.

Please direct any questions to me at the contact address, phone, fax and e-mail information listed in the RFP. Proposals are due on March 31, 2000. I look forward to hearing from you.

Sincerely,

Bridget Quinn-Carey  
Director
Request for Proposal

Introduction

Within approximately one calendar year, the Essex Library Planning and Development Committee will develop a five-year program and facility plan for the Essex Library Association. This plan will address the major challenges of the Library as stated by the Board in its Major Challenges document (attached), and outline in detail specific operational, facility and development plans.

To achieve this goal, the Planning and Development Committee seeks to retain a highly professional and experienced consultant to assist them in the following activities:

- Community Analysis

  Consultant will gather input and feedback from the community regarding library services and space needs through standard and proven means such as focus groups and/or surveys. Consultant will collect, analyze and report on data gathered.

- Moderate Planning Process

  Consultant will lead and moderate discussions of Committee that will evolve from report of community analysis, Major Challenges document, existing library statistics and projections for growth, and any other appropriate documentation. Consultant will keep project on task and lead group to develop and prioritize goals and objectives.

- Draft Plan

  Consultant will use input from Committee discussions to draft a detailed long range/strategic plan of action that will be the basis of long term action items such as work assignments for staff and Board members, and the basis upon which further committees will be formed (i.e. Development, Building, etc.) as needed. Committee and Consultant will edit and finalize document as necessary.

- Participate in Presenting Plan

  Consultant will participate in introducing the completed, published Plan to community groups.
Background

History

The Essex Library Association was formed in 1893 to provide residents of Essex Village access to quality reading materials. The library was housed in a local residence. In 1898, land and funds donated by two local residents enabled the Library Association to build a library facility in downtown Essex.

It is worth noting that the Ivoryton Library Association, also located in the Town of Essex, opened a library in 1888 to meet the “...moral and literary needs of area residents.” The two libraries are separate organizations and are governed by separate boards of trustees; each is funded in part by the Town of Essex, both retain their Association membership to date, and both currently serve the information access needs of all residents of the Town, and by extension, the State of Connecticut.

The Essex Library moved to a newly constructed library building in 1980, and has since been determined by the Town to be the ‘Principal Public Library’ in the Town of Essex. This designation enables the Essex Library to receive State Library funding and related services.

Other historical/town details:

- Essex was voted the “Best Small Town in America”, in Norman Crampton’s, The 100 Best Small Towns in America, Macmillan Press, 1995.
- Essex is experiencing significant growth as more families (many with young children) move to the area.

Facility

The Essex Library is located in downtown Essex Village in a beautiful 4,308 square foot facility constructed in 1979. It serves a legal population of 6,133 people, but also participates in Connecticut’s ‘Connecticard’ program, which enables residents from any town to use any other town’s public library.

Other facility details:

- The facility is ADA compliant.
- Wired for local area network
- Severely strained for space (staff, collection, meeting, display)
- Open 47 hours week, including Saturdays and Sundays
- Library Association owns house and property immediately adjacent to Essex Library and currently rents this facility to private resident.
- In 1998-99, the library had approximately 40,000 people through the doors.
Collection

The collection is in the process of being converted to electronic format. The library holds approximately 25,000 titles: 24,000 book and serial, 500 video, and 640 audio; needed growth is limited due to shelving space constraints. The library is beginning to offer online, electronic information sources that are accessible remotely (via the World Wide Web.)

Other collection details:
• Annual circulation for FY99 was 46,500
• Estimated number of reference transactions was 5,590
• 625 Interlibrary loan transactions initiated
• Approximately 4,800 currently registered patrons
• Four computers provide Internet access and selected applications for patron use

Programs

The library sponsors numerous programs throughout the year including regular and occasional children’s programs, a Brown Bag Lunch series; serious consideration of introducing a reading discussion series is underway. These programs currently take place in the children’s area of the library, and significant furniture rearrangement is necessary to provide adequate space.

Staff

The library employs one full-time Director (35+ hours/week), one Assistant Director/Head of Adult Services (19-23 hours/week), one Children’s Librarian (20-22 hours/week), one Technical Services Library Assistant (20-23 hours week), one general Library Assistant (10-15 hours/week), one general Library Aide (10 hours/week) and one Janitor (5 hours/week).

The experienced and professional staff maintains a very high level of customer service and strives to provide excellent reference services, reader’s advisory, resource instructional services, outreach and programming for library patrons and community residents. The library has employed three of the professional staff members for at least 15 years.

Other staff details:
• Salaries meet or exceed Connecticut Library Association’s minimum guidelines for professional staff.
Funding

Operational funds are appropriated from several major sources of revenue (FY00 figures):

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Endowment</td>
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<tr>
<td><strong>Total (approximate)</strong></td>
<td><strong>$219,500.00</strong></td>
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Other funding details:

- The Friends of the Library contribute significant funding throughout the year for items not provided for in the regular operating budget.
- The library regularly receives memorial contributions and gifts.
- Copy of FY00 budget is attached.

Planning Process to Date

The current director was hired in November, 1999. Before interviewing potential candidates, the Board embarked upon an ambitious process of looking towards the future of the library and drafted the Major Challenges document, which outlines general goals for the library and its role in the community.

This work has been the basis for the current planning process. The Board selected Roger LeCompte to Chair this committee. Mr. LeCompte has assembled a core committee of 15 community members, including five board members and the Library Director, to lead this process. Committee members represent different constituencies of the community; all members are enthusiastic, committed and professional.

Brief résumés of several people involved with planning process are attached.

Consultant Qualifications

The Essex Library Planning and Development Committee is seeking to retain a professional consultant, preferably someone with library planning experience. However, consultants with private sector or general non-profit planning experience will be seriously considered.
Guidelines

e, please address the following questions and issues:

- Explain how your experience and skills in planning match the needs of the Essex Library.
- What unique qualities could you bring to our planning process?
- What library and/or non-profit planning experience do you have?
- How would you go about gathering community input and evaluating the information needs of the community?
- Create a draft timeline of the planning process, from date of hire to completion of planning document.
- Enclose at least two, and not more than five, examples of your work (a completed strategic plan, a work in process, or community scan/survey report).
- Provide a basis for how you would price a project of this kind. Provide actual or estimated hourly rate, and a range or estimate of possible project costs.
- Provide a list of organizations we may contact as references.

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be evaluated against the following criteria:

- Consultant demonstrates that he or she will be a good match for the needs of the Essex Library Planning and Development Committee.
- Consultant has relevant experience in strategic planning that would translate well into work provided for Essex Library planning needs.
- Estimated costs are appropriate for work outlined.

We reserve the right to accept or refuse any or all bids.

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If a candidate for this consulting position, please submit five (5) copies of the following address by March 31, 2000.

Bridget Quinn-Carey
Director
Essex Library Association
33 West Avenue
Essex, CT 06426
Planning Consultant
For the Essex Library Association

What do we want?

We want a(n):

Objective 3rd person to elicit candid, honest responses from committee, board, staff and community during brainstorming and community input phases

Person with ideas, who has seen many examples of how libraries give their users what they want and need (aware of broader library/non-profit trends) and can effectively integrate those ideas and suggestions within our process.

Consultant that is technically savvy (can suggest how networks, consortia and online services may affect our future plans).

Person and firm that have experience with development and other non-profit agencies (not just municipally funded libraries.)

Someone to draft, revise, write and layout the actual document(s) who possesses skills in presenting visually attractive and technically correct reports and plans.

Someone to help us move the planning process forward through step-by-step procedures and well-organized tasks

Someone who will ensure that we end this process with a logical, concise, clear and manageable plan to move towards implementing service, facility and development programs.

Someone to organize focus groups/survey and give suggestions regarding what constituencies of residents to invite, how long each session should be, where to hold them, what questions to ask, how to report of results, how many people to have participate, etc.

Consultant that will challenge us (community, board, committee, staff) to think critically, make essential decisions, set priorities, and envision what is really best for Essex, not just what we think we can provide -- not just maintaining status quo or gravitating to what is easiest.
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