



**JACKSON COUNTY  
LIBRARY SERVICES**

## **Request for Proposal for Strategic Planning Facilitation**

DATE: 7/1/2021

TO: Invited Parties

FROM: Kari May, Library Director

SUBJECT: Strategic Planning Facilitation – Proposals Due Friday, August 27, 2021

Jackson County Library District (JCLD) seeks a qualified, experienced facilitator to help lead creation of its next 3- to 5-year strategic plan. The ideal candidate will facilitate a series of meetings, distilling themes and priorities from each, and will be instrumental in providing a dynamic plan that can be updated as needed. The plan will address the implications of the proposed priorities and goals for library services, collections, technology, staffing, facilities, and service models. The purpose of the strategic plan is to position JCLD to identify and respond to the needs and interests of its community, to engage library patrons, staff, board, and volunteers in the planning process, and to raise awareness of existing and potential library services and resources.

Proposers are required to comply with all provisions of Oregon Revised Statutes and District policy. JCLD reserves the right to:

1. Reject any or all proposals not in compliance with public proposal procedures;
2. Postpone award of the contract for a period not to exceed sixty (60) days from date of proposal opening;
3. Waive informalities in proposals; and
4. Select the proposal that appears to be in the best interest of the District

### **About the District**

JCLD is dedicated to connecting people to information, ideas, and each other. The library serves approximately 220,000 residents of Jackson County with fifteen branches in Applegate, Ashland, Butte Falls, Central Point, Eagle Point, Gold Hill, Jacksonville, Medford, Phoenix, Prospect, Rogue River, Ruch, Shady Cove, Talent, and White City. JCLD provides a wide range of children's, teen, and adult physical and electronic resources and collections as well as outreach services, including booktalks for elementary and middle school students, services for homebound patrons, and outreach to childcare centers. The ever-changing calendar of programs and events is diverse, including musical performances, lectures, art exhibits, classes, book groups, storytimes, and more. JCLD enjoys a very supportive Foundation and also has Friends groups at each branch.

## **Mission**

*Connect people to information, ideas, and each other.*

## **Vision**

*Through the Jackson County Libraries, individuals reach their full potential, and our communities thrive.*

## **Values**

- INCLUSION – our libraries welcome everyone, and we honor diversity and individual perspectives.
- TRUST – we champion free and open access to knowledge and value and respect everyone’s right to privacy and confidentiality when accessing library resources.
- STEWARDSHIP – we are responsible, honest stewards of public resources.
- COLLABORATION – we foster an environment that inspires building relationships and working together.
- INNOVATION – we encourage creative ideas and solutions.
- RESPECT – we build and foster an environment where everyone is heard and treated fairly and with kindness.

## **Proposal details**

JCLD seeks a professional facilitator to:

- Oversee the strategic planning process.
- Guide all stages of the strategic planning process, including gathering data; conducting surveys; and conducting meetings with stakeholders, library staff, Board of Directors, and community members.
- Assist in identifying service priorities, goals, objectives, and activities to meet community needs for the next three to five years.
- Identify gaps between current library operations, resources, facilities, and staffing and the above priorities, goals, objectives, and activities.
- Provide a strategic plan document/framework that will be updated by staff.

## **Proposed timeline**

Initial stages of the strategic planning process are expected to start in September 2021, with an expected completion of first draft in March 2022.

## **Selection criteria**

Proposals will be evaluated by the JCLD strategic planning committee, which will be comprised of library staff and board members. Staff may conduct followup interviews with finalists via phone or streaming video. Proposals will be evaluated on the following criteria:

- Relevant experience and success in strategic planning facilitation.
- Cost to complete the process.
- Demonstrated ability to meet deadlines and operate within budget.
- Prior experience working with both public and staff committees.
- Demonstrable facilitation and qualitative/quantitative integration skills.
- Creativity and ingenuity.

## **Proposal requirements**

To be considered, proposals must include:

- Cover letter including a brief description of the firm or individual, as well as the name and contact information of the principal.
- List of any personnel involved in the process and their role and prior experience.
- Summary of the facilitator's qualifications and experience.
- Project plan that includes a description of the methodology, tasks, timeline, and key dates.
- Schedule of costs to complete the project, with reimbursable costs such as mileage and lodging estimated as separate line items.
- References and contact information for at least 3 current or previous clients for whom comparable work was completed.
- Copy of your standard contract, if applicable.
- Any additional documentation or information the the proposer deems fit to assist Jackson County Library District in their selection process.

Proposals addressing the above criteria shall be directed via the contact information below.

Kari May  
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Jackson County Library District  
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541-774-6401

Proposals will be received by JCLD until 5:00pm on Friday, August 27, 2021. Proposals received after this time will not be considered. Please submit proposal via email as PDF files with the subject line "Proposal for Strategic Planning Facilitation."