

Summary of Library RFP's

Listed below is a summary of the RFP's that we have received for the Library project which was due in our office by Friday, January 23, 2015.

Library Development (Alan & Leslie Burger)	\$15,500
Aaron Cohen Associates Ltd.	\$19,620
Maureen Sullivan Associates	\$21,600 - \$29,400

Library
Development
Solutions

January 15, 2015
Jim Smith

Dear Jim,

We appreciate the opportunity to provide a proposal for a new strategic (Master) plan for the East Norwalk Library. The proposal outlines our understanding of the project and includes detail about the proposed work plan and estimated project cost.

We look forward to the chance to work with you as you consider the library's response to changing community needs and a new set of action plans to achieve them. We understand the challenges ahead as the library makes strategic decisions concerning its future, as it tackles issues related to changing technology and facility needs, and works to provide good customer service to all residents in the Third Taxing District. Library Development Solutions will help to address issues of changing collections; the way people use the East Norwalk Library, ageing facilities and facility use, sustainable funding and other issues with an imaginative and collaborative process.

We believe that libraries can be reimaged and transformed to meet changing needs. Your new plan will be both pragmatic and inspirational.

Please call us with any questions after reviewing the proposal at 609-712.0585. We look forward to discussing the proposal with you.

Sincerely,



Alan Burger
Leslie Burger

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609-275-4821
609.275.4784 (fax)
www.librarydevelopment.com
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Planning Proposal
For the
East Norwalk Library

Library Development Solutions
Princeton, NJ
January 2015

Executive Summary

Project Scope

The East Norwalk Library is seeking to develop a new strategic plan of service to assist in addressing the needs of its community for the next several years.

This strategic planning project for the library will focus on both the immediate and long-term challenges specific to the delivery of library services and will develop strategic responses to meet these new challenges. Some of the questions to be explored during the planning process may include:

- What do TTD residents and leaders of the library's service area expect and need from the library, both now and in the future?
- Does the current vision and mission of the library reflect those needs?
- What are the contemporary roles of the library for the community's children, teens, older adults and parents?
- How does the library respond with relevant services, collections, technology, facilities and marketing to meet identified community needs and expected future needs?
- How does the library respond to a quickly changing environment in which the issues of traditional library services, content and collections, and staffing are being challenged and redefined very differently?
- What are the specific local challenges and barriers associated with reimagining the East Norwalk Library of the future?

Library Development Solutions will lead the Library (the ENIA and Van Zilen community Hall) in a dynamic planning process to discover answers to these questions and a new strategic plan of service will be developed as a roadmap to effectively respond with both practical and inspiring solutions. The consultants will provide a process that engages and invigorates the community, staff, and members of the TTD Commission in a straightforward method.

Summary of Activities and Deliverables

Library Development Solutions suggests the following components to ensure a successful strategic planning process:

1. **Information Gathering**
The consultants will review all studies, reports and previous analysis about the library and the community, including any previous strategic plan. (Included)
2. **Needs Assessment and Analysis**
LDS will facilitate up to three focus groups and one "Community Conversation" (town meeting) of residents, parents, teens, business, civic and elected leaders, patrons to assess their current awareness and satisfaction with library services, programs and collections and to discuss their ideas for future library services, collections and programs. We will also test the assumptions and roles that the library currently uses against resident's perceptions. An additional six one-on-one interviews may be conducted with key stakeholders, if needed. LDS is skilled and successful in guiding clients to successfully recruit for each focus group and will facilitate each. (\$6,000)
3. **Both an online and print user survey will be developed and distributed in which residents may contribute open-ended ideas and feedback to the planning team for the strategic plan. LDS has been successful in eliciting a large number of responses to surveys. (\$2,500)**
4. **The consultants will provide a written report based on the information from the focus groups, the community meeting and the survey. The consultants will also offer recommendations and suggestions based on their observations and experience with public libraries, many of which can be implemented in parallel with the overall planning process (Included)**
5. **Plan Assembly**
The consultants will facilitate up to three planning sessions with a Planning committee including a ½ day Commission/Planning Committee Retreat. The Retreat will include discussion of service needs and service responses, trend analysis, SWOT analysis, facilitation of a new library vision and mission and core values, if needed, new goals, objectives and activities. (Included)

6. A written, plan of service will be developed to guide the library's service program and facility for the near future. (\$6,000)
7. Library Development Solutions' consultants will revisit the library within 12 months of implementing the plan to review progress with the Board and/or the Director. (Included)

Project Work Plan

Conduct Needs Assessment: Community Focus Groups, Community Conversation Meeting, and Survey

The consultants will facilitate up to three focus groups and one Community Conversation to elicit ideas and comments from residents, parents, older adults, students, elected officials, business and civic leaders, or other groups who are crucial to a discussion about the library's future. Library Development Solutions will guide the library staff and Association in organizing these meetings and will facilitate each of the meetings.

Focus groups are held with up to fifteen people representing a specific segment or geographical area of the population. Focus groups provide valuable anecdotal information, using an open ended set of questions to guide discussion, to assess residents' feelings about the library. The consultants are skilled facilitators in providing an environment that makes involvement easy and fun for the participants.

The Community Conversation is a more general open meeting without pre-registration in which all residents are welcome and invited to attend. This format gives all residents and users the opportunity to be involved in discussing the library's role and future.

The consultants will design an online and print user survey with the involvement of the library director. The survey will provide additional feedback from users, nonusers and residents alongside the anecdotal information from the focus groups and allows broader participation from the community.

The consultants will review outcomes from the focus group meetings, Community Conversation and survey and provide an actionable report and analysis to the Board/Planning Committee.

Facilitate meetings with the Board/Planning Committee

The consultants will facilitate Association/Planning Committee meetings and a ½ day Planning Retreat and assist with developing a unified approach to the strategic plan.

Write Strategic Plan

Library Development Solutions will guide the Planning Committee and the Director in discussion to develop goals and objectives to meet community needs for the near term and provide information to assist in making other decisions for the longer term. The consultants will provide a plan that will help to reimagine and transform the library, to meet new challenges.

The consultants will conduct a follow up meeting within one full year of implementation of the plan.

The planning process and final written strategic plan will provide a roadmap and timetable of measurable actions to address:

- Service expectations, digital and print collection development, programs and services to children, teens, older adults and all users
- Technology infrastructure and resources, web presence, social media use
- Advocacy and support issues
- Budget, sustainability and fundraising issues
- Facility and infrastructure needs
- Public relations, marketing, branding and effective communication to residents
- Community partnerships and collaboration
- Effective use of metrics and outcomes

The Planning Committee will meet with the consultants at least 3 times plus a Retreat before the draft of a plan is written near the end of the planning process.

Project Timeline and Costs

Library Development Solutions is able to begin this project in March 2015 and complete it within nine months. The flexibility of the timeline will depend upon the Association's needs.

Project Timeline:

- | | |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Phase One
Month 1-2 | <ul style="list-style-type: none">• Data collection and review• First meeting with Planning Committee• Set dates for meetings, interviews, focus groups and community conversation• Begin recruiting for focus groups |
| Phase Two
Month 2-4 | <ul style="list-style-type: none">• Conduct focus groups, interviews and Community Conversation meeting• Develop and promote survey• Board/Planning Committee meeting, if needed• Write a brief feedback report |
| Phase Three
Months 3-9 | <ul style="list-style-type: none">• Report back to Planning Committee with report• Association/Planning Committee Retreat• Develop new vision, mission, goals, objectives and action plans for the new/revised strategic plan• Draft review period• Final copy of strategic plan• Communication of plan to public |

Fees

Base professional fees for this project, as written, are \$14,500. The consultants will meet to discuss the various components of the planning process and identify the library's needs as well as the final fees. An additional \$1,000 in expenses includes travel; report editing and proofreading and professional final plan design. The total for the project is \$15,500.

Fees will be invoiced as follows:

One third upon signing an agreement

One third upon completion of Phase Two

One third upon completion of Phase Three

About Library Development Solutions

Library Development Solutions was founded in 1991 to assist librarians and library boards with strategic planning, building programs, service program design, improvement and evaluation, community needs assessments, and organizational and staff development.

Library Development Solution's Principal Consultants are Leslie Burger and Alan Burger. Ms. Burger's qualifications reflect a unique background of over 35 years of experience in public and state libraries with key responsibilities in the areas of planning, program evaluation, multi-type library cooperation and networking, program design, and staff development. Leslie is currently the Director of the Princeton Public Library and is a past president of the Connecticut Library Association, the New Jersey Library Association and the American Library Association and a well-known national and international speaker on library issues. Library Development Solutions' associates Jim Hecht, John Blyberg or John LeMasney may also be asked to participate in this project if their expertise is required.

Since founding Library Development Solutions, LDS has worked with more than 120 clients throughout the US and internationally to help position library services and programs to be more responsive to the changing needs of their communities. We do this in two ways - first by talking to people in the community and learning what they like about their libraries and how they want their libraries to improve. Secondly, we work with trustees, staff, and community stakeholders to think about the future in a structured way using a dynamic library planning process developed by Library Development Solutions, which incorporates elements of PLA's New Planning for Results as well as other strategic planning models for businesses and non-profits. The planning process considers the community feedback, addresses strategic issues confronted by public libraries and engages planners in an honest and frank discussion about the future of their library. We have found that this process invigorates the community, and planners and gets them focused on the importance and value of their library in the community.

LDS is skilled in meeting design and facilitation and has planned, coordinated and facilitated meetings attended by thousands of community representatives, library trustees and library staff and professionals. In the past few years, they have interviewed over 5,000 library customers and potential customers in focus group sessions and have surveyed over 100,000 individuals to determine their library and information needs.

Clients and References

Since 1991, Library Development Solutions has worked with over 120 clients on a variety of projects including strategic planning; community needs assessments, meeting planning and facilitation, building programs, organizational redesign, program evaluation, team building and staff development, and space needs assessments. A selected client list is attached to this proposal.

Professional references include:

- **Westport Library, CT**
Maxine Bleiweis, Director
203-291-4801
mbleiweis@westportlibrary.org
- **Albert Wisner Public Library, Warwick, NY**
Rosemary Cooper, Director
845-986-1047 ext. 6
rccoper@rcls.org
- **Avalon Free Public Library, NJ**
Norman Gluckman, Director
609-967-7156
ngluckman@avalonboro.org
- **Moorestown Public Library, NJ**
Joe Galbraith, Director
856-234-0333 X3031
jgalbraith@moorestown.lib.nj.us
- **Pound Ridge Library, NY**
Marilyn Tinter, Director
914-764-5085
mtinter@wismail.org

In Connecticut:

Libraries we have worked with in the past several years on strategic plans or facilities plans in Connecticut:

- **Westport Library**
Maxine Bleiweis, Director

Library Development Solutions
Princeton, NJ 08543
www.librarydevelopment.com
aburger@librarydevelopment.com

203-291-4801

mbleiweis@westportlibrary.org

- **Bridgeport Public Library**
Scott Hughes, Director
shughes@bridgeportpubliclibrary.org
203.576.7779
- **Wilton Library**
Kathy Leeds, Director-retired
kcleeds@gmail.com
- **New Canaan Library**
Alice Knapp, Former Director, now the President of the Ferguson Library,
Stamford
203.351.8201
aknapp@fergusonlibrary.org
- **Library Connection, Inc.**
George Christianson, Executive Director
860.298.5322
gchristian@libraryconnection.info

Select Clients

Since 1991, LDS has worked with urban, suburban, and rural public libraries, academic and special libraries, and single and library cooperatives to develop strategic plans, create and manage organizational transitions, design new facilities and conduct director searches.

Public Libraries

Albert Wisner Public Library, Warwick, NY
Abington Township Public Library, PA
Asbury Park Public Library, NJ
Ansonia Public Library, CT
Avalon Free Public Library, NJ
Avon Free Public Library, CT
Boonton Holmes Public Library, Boonton, NJ
Bridgeport Public Library, CT
Bronxville Public Library, NY
Brookfield Public Library, CT
Burlington County Library, NJ
Capital Area District Library, MI
Carlstadt Public Library, NJ
Carteret Public Library, NJ
Cheltenham Township Library System, PA
Chester Library, NJ
Cumberland County Library, NJ
Darien Library, CT
Denville Free Public Library, NJ
Deptford Public Library, NJ
East Monroe County Library, PA
East Orange Public Library, NJ
Edison Public Library, NJ
Elizabeth Free Public Library, NJ
Fanwood Public Library, NJ
Fairview Public Library, NJ
Flint Public Library, MI
Genesee County Library System, MI
Gloucester County Library, NJ
Goshen Public Library, CT
Goshen Public Library, NY
Greenwich Public Library, CT
Haddonfield Public Library, NJ
Hamden Public Library, CT
Harrison Public Library, NY
Hawthorne Public Library, NJ

Systems, Consortia, State Libraries

Bergen Passaic Regional Library Cooperative, NJ
Bibliomation Inc., CT
Capitol Region Library Council, CT
Central Jersey Regional Library Cooperative, NJ
Delaware Division of Libraries, DE
Commonwealth Libraries, PA
Connecticut State Library, CT
COSLINE, ME
Georgia Division of Public Library Services, GA
Highlands Regional Library Cooperative, NJ
Idaho State Library, ID
Infolink, NJ
Lake County Library System, FL
Library Connection Inc., CT
Maine State Library, ME
Mercer County Library System, NJ
Nassau Library System, NY
New Hampshire State Library, NH
New Jersey State Library, NJ
Ocean County Library, NJ
Palm Beach Library Cooperative, FL
Pioneer Library System, NY
Polk County Library Cooperative, FL
Ramapo Catskill Library System, NY
Rhode Island Department of Library Service, RI
Seminole County Public Library System, FL
SOLINET, GA
Somerset County Library System, NJ
South Jersey Regional Library Cooperative, NJ
Southeast Florida Library Network, FL
Southern Connecticut Library Council, CT
Southern Tier Library System, NY
Sumter County Library System, FL
Vermont Division of Libraries, VT
Westchester Library System, NY

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Highland Park Public Library, NJ
 Hoboken Public Library, NJ
 Horsham Township Library, PA
 Kenilworth Public Library, NJ
 Blackstone Memorial Library, Branford, CT
 Library of the Mendhams, NJ
 Live Oak Public Libraries, GA
 Library of the Chathams, NJ
 Livingston Public Library, NJ
 Long Branch Public Library, NJ
 Madison Public Library, CT
 Madison Public Library, NJ
 Matawan Aberdeen Public Library, NJ
 Millville Public Library, NJ
 Moffat Library, Washingtonville, NY
 Monroe Public Library, CT
 Monroe Township Library, NJ
 Montclair Public Library, NJ
 Montgomery County-Norristown PL, PA
 Moorestown Public Library, NJ
 Mount Laurel Public Library, NJ
 Mount Pleasant Public Library, NY
 Nanuet Public Library, NY
 Neptune Public Library, NJ
 Newburgh Public Library, NY
 New Canaan Library, CT
 New Milford Public Library, CT
 New Orleans Public Library, LA
 New Rochelle Public Library, NY
 North Castle Public Library, Armonk, NY
 Norwalk Public Library, CT
 Ocean City Public Library, NJ
 Old Bridge Public Library, NJ
 Parsippany-Troy Hills Public Library, NJ
 Paterson Free Public Library, NJ
 Pound Ridge Library, NY
 Radnor Memorial Library, PA
 Ramsey Free Public Library, NJ
 Rangeview Library District, CO
 Ridgefield Library, CT
 Ridgefield Public Library, NJ
 Ridgewood Public Library, NJ
 Rockaway Township Free Public Library, NJ

Special and Academic Libraries

The Council on Foreign Relations, NY
 Ernst and Young, NY
 Georgia Tech Library and Information Center, GA
 American Library in Paris, FR
 Bobst Library, New York University, NY
 Housatonic Community College, CT
 Santa Fe College, FL
 Information Resource Centers, Dept. of State, US
 Tulane University, LA.
 Victoria College/ University of Houston-Victoria, TX

Associations and Foundations

Florida Library Association, FL
 Connecticut Library Association, CT
 Connecticut Library Consortium, CT
 Pennsylvania Library Association, PA
 Pennsylvania School Library Association, PA
 Library Power Providence, RI
 Gulf Coast Libraries Project, LA, MS
 Hartford Foundation for Public Giving, CT
 Health Sciences Libraries of New Jersey, NJ
 Charles Stewart Mott Foundation, MI
 Mt. Vernon Public Library Foundation, NY
 New Jersey Vietnam Veterans' Memorial Foundation, NJ
 New Rochelle Library Foundation, NY
 Warwick Public Library Foundation, NY
 The New York Library Association, NY
 The Reader's Digest Foundation, NY

Rye Free Reading Room, NY
Sayreville Public Library, NJ
Scotch Plains Public Library, NJ
Scoville Memorial Library, Salisbury, CT
Upper Dublin Public Library, PA
Westfield Memorial Library, NJ
Westport Library, CT
West Hartford Public Library, CT
West Milford Public Library, NJ
Weston Public Library, CT
Wilton Public Library, CT
Windsor Public Library, CT

Woodbridge Public Library, NJ

Library Development Solutions

Leslie B. Burger, M.L.S., M.S.

- Education** University of Hartford, M.S. Organizational Behavior
University of Maryland College Park, M.L.S.
Southern Connecticut State College, BS, Cum Laude
- Affiliations** American Library Association, President 2006 -2007,
President Association of Specialized and Cooperative Library Agencies
(ASCLA) 1995-96; Councilor at Large, 2003 - 2005, President Elect 2006
New Jersey Library Association, President 2001-2002
Connecticut Library Association, President 1982-1983; ALA Chapter
Councilor 1984-87; NELA Representative, 1979
Connecticut Council on the Humanities Board Member
New England Library Association
- Honors and Publications** Beta Phi Mu, Library Science Honor Society
2003 - YWCA of Princeton, Tribute to Women Award
2005 - NY Times Librarian
2006 - University of Maryland, College of Information Studies, Alumna of
the Year
2008 - SCSU, Outstanding Alumna
2009 - Rotary of Princeton, Community Service Award
"Connecticut Citizens Information Needs" Connecticut Information Needs
and Use Study, co-author with Dr. Ching-Chi Chen
"Library Leaders for the 1990's", Wilson Library Bulletin
Monthly column American Libraries, July 2006 - June 2007
Libraries for All Seasons and All Reasons, American Libraries, March 2008
- Experience** Leslie Burger is the founder of Library Development Solutions (LDS). Prior
to starting her consulting firm, Ms. Burger worked at the New Jersey State
Library for 3 years and the Connecticut State Library for 10 years. In both
these positions, Ms. Burger gained a wide range of professional experience
in the areas of planning, evaluation, needs assessment, and program design.
Leslie is currently the Director of the Princeton Public Library in Princeton
NJ.
- Since founding Library Development Solutions, Ms. Burger has worked with
over 120 urban, suburban, and rural public libraries, academic and special
libraries, state libraries, and single and multitype library cooperatives in
planning, space needs assessments, evaluation, and program
implementation.
- Ms. Burger is a recognized speaker, writer, and consultant on staff
development, planning and evaluation, and organizational development.
She has served as president of the American Library Association,
Connecticut Library Association, the New Jersey Library Association, and
Association of Specialized and Cooperative Library Agencies

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Library Development Solutions

Alan R. Burger, MBA

Education

University of Hartford, MBA
University of Bridgeport, BA
General Electric's Management Practices Course (Crotonville, NY)
Certification: COMMUNISPOND Executive Communications Skills Training

Experience

Mr. Burger works with libraries, foundations and other 501(c) 3 organizations in assessing community or user needs, improving user satisfaction, creating strategic plans and solving organizational issues. Mr. Burger has interviewed over 5,000 library customers and potential customers in focus group sessions and has surveyed over 10,000 individuals to determine their library and information needs. His areas of expertise include:

- Long Range and Strategic Planning
- Community Needs Assessments
- Focus Group Design and Facilitation
- Customer Loyalty
- Customer Service and Satisfaction
- Facility and Capital Planning
- Board and Staff Development
- Change Management
- Performance Improvement
- Staff Handbooks

Alan has consulted with public libraries in Connecticut, New York, New Jersey, Colorado, Georgia, Pennsylvania, Florida, Michigan, New Hampshire and Rhode Island since 1991.

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Jim Smith
General Manager
Third Taxing District
2 Second Street
Norwalk, CT 06855

January 13, 2015

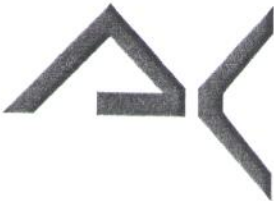
Dear Mr. Smith,

Enclosed is our response to the RFP for the East Norwalk project. Thank you very much for the opportunity to submit; we look forward to hearing from you. Please contact us with any questions.

Best,

Deb See, MLS

Library Analyst/Marketing Manager



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Croton-on-Hudson, NY 10520

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Fax: 914- 271-2434
aca2015@acohen.com
www.acohen.com

January 13, 2015

Charles Yost
Chairman of the Commission
Third Taxing District of the City of Norwalk

Dear Charles,

Attached is our proposal for the development of a strategic master plan for the East Norwalk Library. Our team will analyze facilities, space and service options, and recommend strategies to improve the Library.

The proposed scope of work will include a unique snapshot of the community and plans to support improvements in library services. The team will develop a community survey, which will be used to develop space and service-planning strategies to improve the library. Please review the attached proposals and contact me with any questions.

Regards,

Alex Cohen
President

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MASTER PLAN

East Norwalk Library

Scope of Work

Our work will include a user survey and space-planning review of the East Norwalk Library. Our planning report will include recommendations on repurposing or redesigning the library. The library facilities plan will help develop strategies for identification of service needs, opportunities for improvement, and redesign.

TASK 1 – Community Survey/Needs Assessment

When the project is approved, Aaron Cohen Associates (ACA) will develop a project schedule. Our team will develop agendas for planning workshops and start developing a user survey.

Preliminary Steps

- ACA and East Norwalk Library will develop a schedule for the project
- ACA will provide East Norwalk Library with a preliminary customer survey
- East Norwalk Library will review the user survey outline and provide feedback
- East Norwalk Library will provide ACA library board reports and AutoCAD (dwg) files of the library building
- ACA will review the library building and site
- ACA will provide a document requesting strategic planning data
- East Norwalk will begin to gather data for analysis

Community Survey

As stated above, ACA will provide guidance that will allow East Norwalk Library to develop an effective survey tool. The survey will help answer questions relevant to the strategic planning process. Potential topic areas for exploration may include:

- The community's vision for the library
- The services the library provides to the community
- Desired amenities, special features and facilities
- Community priorities for the investment of limited resources

Questions will be tailored for current users and non-users of the Library. The survey will be available in an online format with a limited number of printed copies also available.

Survey Instrument Development. ACA will collaborate with library team members to ensure that questions are understandable, survey length is reasonable, and analysis of results is meaningful.

Survey Promotion & Administration. ACA will provide advice on promoting the survey. Specific efforts can be made to encourage non-users to participate in the survey.

Survey Analysis & User Profiles. ACA will analyze the community survey and create a draft set of user profiles. We will also take any previous customer surveys into consideration.

Focus Group Activities. ACA will facilitate focus group discussions with the community.

Library Planning Workshops

The Library Planning Team will schedule and conduct a series of roundtable workshops with the Library Planning Committee. This Committee will:

- Be comprised of members of the library board of trustees, library staff and town management.
- Support project management activities, including scheduling and communication with ACA.

ACA's workshops will include strategy discussions and dialogues to help define the "best parts of the East Norwalk Library."

In addition, the team will set up meetings with a diverse set of stakeholders (parents with children, adults and mature adults, community leaders, businesses, etc.). Below are a few examples of strategy-building questions.

- What are the service needs and priorities?
- What are the options for future space use?
- What are the unique issues associated with operating a stand-alone library within a city with a public library system?

Workshop participants will include:

- Families with Children
- Adults
- Board of Trustees
- Staff

Visual Scan

ACA will arrange a Visual Scan of the Library with focus group participants. Three or four groups will tour the library building over a two-day period. The observational assessment will help our team understand the use and behavior patterns in the library. Participants will be asked to grade library spaces, indicating the GAPS between what the library user needs and what is available.

Data Gathering

Our team will research how the library staff operates; with this information, we will be better able to make recommendations for improvements, in both space and service.

Needs Assessment

ACA will begin a quantitative assessment of library use. The information below will be used to develop a space needs assessment.

- Current facility capacity
- Building components
 - Collection profile – number of volumes, number of linear feet
 - Number of electronic readers and computer seats
 - Number of meeting rooms, collaborative, group and study room seats
 - Profile of staff space
 - Profile of other staff support and operational spaces
 - Percentage of non-assignable space
- General requirements of the library building

Library Service Assessment

ACA will review:

- Access to services: what is available, what needs to be added
- Circulation workflow
- Staffing and hours (strategies to increase services)
- Service points to improve customer service
- Collection and adjacent quiet seating locations
- Investment in library technology (ex. adding a searchable database and increasing access to the CT library system resources)
- Electronic resources (ex. develop partnerships with fee- and subscription-based services)

The Library Planning Team will review qualitative and quantitative documentation including: library board comments, community leadership suggestions, existing floor plans, past planning studies, mechanical upgrades, etc.

Deliverables

Roundtable Workshop (s)	Review of current building layout What does it mean to develop the library of the future?
Visual Scan	Meeting with community focus groups (community and business leaders, partners, etc.)
Community Survey	Deployment of a survey instrument to answer questions salient to the planning process.
Space Needs Assessment	Review library space needs; potential to reuse existing space.

Library Service Assessment	Review of available services and gaps therein
Staff meetings on-site, online	Work with the library planning committee, library board of trustees and staff to develop strategies for the future.
Site Visit #1	The first site visit will include a series of listening sessions. For example, the kickoff meeting will share and outline the development of the facility program.

TASK 2 – Summary Building Program

ACA will develop a series of profiles outlining the needs for the library. The program will be based on ACA's library space planning standards; developed over our 45-year history.

The summary building program will allow the Library board to learn about the library's strengths, opportunities, constraints and weakness. The program will address the community's needs for a modern collection, learning environments and operations.

The team will incorporate findings from:

- Visual scan – observation of community behavior patterns
- Community survey
- Library planning profiles (collections, seating, staff)
- Assessment of space needs; percentage of:
 - Fixed feature space
 - Semi-fixed feature space
 - Informal space
- Library staff profile
- Operational assessment

The summary building program will include:

- Profiles of the collection, computer seating and staffing, to be used to develop the Facility Program.
- The summary building program will determine the future space needs for:
 - Collections – linear feet
 - Digital resources
 - Services/functional areas
 - Operations/staff support
 - Community partners

The summary building program may contain the following components or functional spaces:

- Net assignable square feet of each area or room
- Collection type and size
- Circulation and/or its self-service functions
- Reference/discovery search area
- Marketplace of services
 - Collaborative environments
 - MakerSpaces & MOOC areas
 - Quiet study area
 - Group-based projects space
 - Multi-media facilities
 - Training classrooms
 - Community workstations
- Meeting room/multipurpose space(s)
- Operational support space/technical services space

- Other staff workstations/office
- Community partners – academic partners/resource center

Deliverables

<p>Summary Building Program</p>	<p>Summary Building Program – program for the library, functional requirements for library space, NASF requirements for the East Norwalk Library.</p> <p>Defines the number of seats, collections and staff functions in the building.</p>
<p>Library User Profiles</p>	<p>User Profiles developed from the community survey. The profiles will help define community needs.</p>
<p>Preliminary Documentation</p>	<p>Program and Planning Meeting notes will enable the project team to build on workshops, visual scans, staff meeting and roundtable discussions.</p>
<p>Conference Call(s)</p>	<p>WebEx meeting/presentation update</p>

TASK 3 – Preliminary Master Plan

The master plan will include the community survey, building program and strategic plan. The goals, objectives and strategies outlined in the master plan will outline a roadmap forward, providing a step-by-step methodology to follow. We will look for ways to accommodate new service options, i.e. adding flexible space, collaborative workspace and meeting spaces.

The master plan will include strategic planning outcomes and a phased schedule to improve the library. Our team will provide research on the library's current services, trends and options. We will provide recommendations to enhance the library value to the community.

Marketing and Fundraising

- ACA will provide recommendations for marketing/branding strategies to reach out to patrons and increase awareness of new services
- ACA will outline fundraising campaigns to enhance support for the library

Working with the Library Board, we will develop:

- Community goals for the library
- A list of unique objectives
- Strategies to enhance the library's services (ex. increase the amount of programs)

Strategies for the Master Plan

- Assessing quantity and quality of the community user survey responses
- Identifying user needs, expectations, and technology trends
- New concepts that foster learning and innovation while maximizing available space
- Considering whether capital improvements should be made, with consideration given to:
 - Maximizing current usage
 - Ability to raise funds
 - Changing trends in library usage
 - Standard benchmarks for space per resident

Deliverables

Evaluation	Review of the Library Summary Program
Master Plan Outline	Strategies <ul style="list-style-type: none">• Collection• Community learning settings• Staff/operational space• New technologies
Conference Call	WebEx Meeting with Planning Committee

TASK 4 – Space Options for Future Space: Examining the Possibilities

Often, the strategic planning process ends and the energy gained from planning activities wanes. We recommend the process tests a space-planning concept to:

1. Provide a visualization of the future library to support fundraising efforts
2. Offer ideas that will energize community support

The team will utilize the Master Plan to test and visualize the future library. The plan will include a “test” layout, indicating major functional components in programmable blocks. The block diagrams will show options for juxtaposing different space uses in the building.

The Library Planning Team will provide visualizations and/or planning options for both short- and long-term plans:

- Scenario/conceptual plans
- Space planning tests to improve the library

Based on the design scenarios, a preferred concept block plan will be selected to support the Master Plan. The user survey, summary building program, strategic plan and test options will be incorporated into the Final Master Strategic Plan.

Deliverables

Presentation Workshop	Scenario planning workshop - the library planning team will review programmatic options, functional elements, user flow and behavior.
Scenarios for future library space	The planning team will make recommendations for the library building.
Block diagrams	The Library Planning Team will present conceptual relationship diagrams in block form. These are visual representations of potential opportunities to improve the library.
Review of User Profiles	The Library Planning Team will present the user survey / user profiles.
Preliminary cost estimates for selected concept design	The Library Planning Team will provide a summary of costs per square foot to develop a budget to fund the project.
Site visit #2	The Library Planning Team will meet with key stakeholders.

TASK 5 – Final Report on Master Plan

Based upon the selected Concept “Test” Design, the Library Planning Team will provide a presentation of findings. We will provide a copy of the Master Plan on a secure website that will include all appendices – survey results, strategic planning, space planning, options/scenarios and fundraising strategies. The plan will include:

- Meeting notes, stakeholder and staff input
- User survey
- Assessment of service options and scenarios
- Assessment of library space and service needs
- Building program
- Preliminary concept and cost estimates for renovation and furnishings per square foot
- Recommendations for capital improvements (depending on scenario selected)
- Recommendations for fundraising
- Public library planning strategies

	FEBRUARY 2015	MARCH 2015	APRIL 2015	MAY 2015
Task 1 Community Survey/Needs Assessment	X	X		
Task 2 Summary Building Program		X	X	
Task 3 Preliminary Master Plan			X	
Task 4 Options for Future Space: Examining the Possibilities			X	
Task 5 Final Report, Master Plan				X

NOTE: This is a preliminary schedule; all dates subject to change.

Fee Proposal

Work Session	Site Visit	Fee
#1 – Community Survey/Needs Assessment	#1	\$6,300
#2 – Summary Building Program		\$5,400
#3 – Preliminary Master Plan		\$2,160
#4 – Options for Future Space: Examining the Possibilities	#2	\$3,600
#5 – Final Report, Master Plan		\$2,160
FEE - Work Sessions #1-5		\$ 19,620

Hourly Rate: \$180

Upon signature, the library will pay a retainer of 5% of the total fee
Expenses included

Time sheets can be provided upon request

Fee not-to-exceed for project work: \$19,620



Alex Cohen, MLS
President, ACA

Charles Yost
Commission Chairman

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2025 First Avenue
Seattle, Washington 98121
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January 23, 2015

TO: Jim Smith, General Manager, Third Taxing District, East Norwalk, CT

RE: Proposal for Consulting Services – Library Strategic Master Plan

We are pleased to submit this proposal for your consideration. The purpose of this project is to develop a strategic master plan for the library through a results-oriented process that will focus on achieving the critical goals for the library in the next few years. We will bring considerable experience working with libraries and library consortia. Maureen Sullivan has a master's degree in library science from the University of Maryland, a program accredited by the American Library Association. BERK Consulting is a public policy consultancy founded in 1988. Both of us have experience within the last five years working on projects similar to this one, including our joint work in the Greenwich (CT) Library's recent project to create a new strategic plan.

Our proposal follows the requirements listed in the RFP.

Maureen Sullivan is an individual, sole proprietor consultant. BERK is twenty-plus person public policy consulting firm based in Seattle, Washington.

Sincerely yours,

Maureen Sullivan
Organizational Development Consultant

Qualifications: Maureen Sullivan

Maureen's experience as a strategic planning consultant has enabled her to develop the qualifications that are essential to this work. Among these are: expert facilitation skills; the ability to inspire, engage and motivate staff; mastery of interpersonal skills, especially managing differences and communicating effectively in groups and teams; the ability to analyze and synthesize information and ideas quickly and effectively; strong presentation skills; knowledge of the library profession, including the challenges and opportunities that public libraries face in their communities; a deep belief in the potential of public libraries to be central to community development; and an understanding of the trends, developments and forces for change in the larger information world. She derives deep satisfaction from working with new groups and organizations in projects like this one.

One of her core beliefs about being an effective consultant is to work with each client to create a planning process that will work best in their particular situation. She also believes in the importance of informing and engaging staff, the library board, community leaders, and other constituents and stakeholders early and throughout the process. Meaningful engagement of the staff is critical to gaining their commitment to effective implementation of the plan.

Her role as the lead consultant will be to work in partnership with you, a small strategic planning steering committee appointed by you, members of the Library Board, library staff, and other stakeholders whom you may identify to design and carry out the planning process. She will be available to facilitate meetings, both within the library and with community groups; to identify other useful resources; to coach and guide individuals and groups; and to respond to your questions and needs as they emerge.

She established her consulting practice in 1991 to enable her to work with librarians, library staff and library organizations to plan and implement programs that would improve professional practice and would lead to improved library service. Her work focuses in three main areas: strategic planning, organizational restructuring and work redesign, and leadership development. In the past several years she has served as a consultant on several strategic planning projects in public libraries. All of these have included facilitation of community meetings, engagement of library staff, and a plan that inspires and motivates staff to be actively involved in its implementation. An important part of the staff engagement process is educating staff about strategic planning, leading change and embracing innovation.

January 23, 2015

Key Personnel

Maureen Sullivan is the primary provider and is partnering with BERK Consulting for specific elements of the project, which are further described in the proposal. BERK and I have worked together successfully on projects in the past, and we have a shared understanding of the roles and responsibilities for this project.

Maureen Sullivan References

Cary Memorial Library, Lexington, MA

Contact: Koren Stemberge, Director

Telephone: 781-862-6288, ext. 312

kstembridge@minlib.net

Service provided

From June 2012 to May 2013, I served as the planning consultant to create the Library's 2014-2017 Strategic Plan. I guided the work of the steering committee; facilitated community forums, meetings of the Community Advisory Committee and staff forums; and assisted in the preparation of the final document.

Greenwich (CT) Library

Contact: Barbara Omeroyd-Glynn, Director

Telephone: 203-622-7961

bglynn@greenwichlibrary.org

Service provided

From April 2011 to May 2012, I served as the planning consultant to create the Library's Strategic Plan. I guided the work of the steering committee; facilitated community forums and staff forums; and assisted in the preparation of the final document.

BERK and I partnered on this project to complete a community survey. BERK designed and implemented a survey which addressed key questions such as the role of the library in the community, priorities for resource allocation, and interest in potential new services. The input of non-users was of particular interest to the library and special care was taken to tailor questions for this audience and solicit input from infrequent users and non-users. The survey was presented online and in print, in English, Japanese, and Spanish, with a total of approximately 4,500 respondents. Following survey analysis, the BERK team shared findings and their implications for the strategic plan with the library's leadership team and strategic planning committee. BERK also developed the layout for the Greenwich Strategic Plan.

West Hartford (CT) Libraries

Contact: Pat Holloway, Director

Telephone: 860-561-6970

holloway@westhartfordlibrary.org

Service provided

From January to October 2007, I served as the planning consultant to create the Library's Strategic Plan. I guided the work of the steering committee; facilitated community forums and staff forums; and assisted in the preparation of the final document.

BERK References

American Library Association

Contact: Mary Ghikas, Senior Executive Director

Telephone: 312-944-6780

mghikas@ala.org

Service provided

BERK planned and facilitated a one-day strategic planning workshop with more than 70 participants of ALA Council, including the Executive Board, senior management, division leadership, and roundtable representatives. The workshop focused on creating a shared understanding of desired outcomes and developing a road map that enables members to achieve the desired outcomes. In collaboration with the Board, BERK designed exercises to engage councilmembers in dialogue and developed tools to help participants identify their role in the Association's strategic initiatives and implementation steps. The ALA Executive Board is presenting a summary of the workshop's products to the ALA Council at the organization's Annual Conference in June 2015.

Seattle Public Library

Contact: Marilynne Gardner, Chief Financial and Administrative Officer

Telephone: 206-233-5109

marilynne.gardner@spl.org

Service Provided

BERK worked with The Seattle Public Library in the development of a Strategic Plan for future services. BERK designed an inclusive strategic planning process that solicited and incorporated input from key library stakeholders. BERK facilitated five meetings of a project Advisory Committee, comprised of thought leaders of the Seattle community, who will help shape the Strategic Plan and stakeholder engagement. BERK engaged community members and the Library staff through citywide conversations about the future of the library, surveys, focus groups, and public forums with expert panels. BERK worked closely with the Library's project team to synthesize this broad input and developed an actionable Strategic Plan.

Ferguson Public Library

Contact: Nick Bochicchio, Director of Administrative Services

Telephone: 203-351-8202

nboch@fergusonlibrary.org

Service Provided

BERK worked with the Ferguson Library to design and implement a web-based survey of residents, employees, and others who currently use or do not use this library system based in Stamford, Connecticut. The survey was designed to explore perceptions of and priorities for library services during a time of significant change in how people access information and communicate with one another. The results of the Community Survey informed immediate operational response and a subsequent strategic planning effort to be undertaken by the library's Board of Trustees and BERK. With Ferguson Library, BERK developed the strategic plan and designed a layout for the final product.

Library	Maureen Sullivan	BERK
Cary Memorial Library	✓	
Greenwich Library	✓	✓
West Hartford Libraries	✓	
American Library Association		✓
Seattle Public Library		✓
Ferguson Library		✓

Project Work Plan/Approach:

Maureen Sullivan will be available for onsite visits. These visits may include meetings that will occur during non-business hours.

First Month (one day on site)

Initial Site Visit: Maureen Sullivan will come to East Norwalk for a day to meet with the District Commissioners, the executive director of the library and other members of the library staff and any other individuals whom you may identify. At the conclusion of this visit, she, in close consultation with you and Charles Yost, the Chairman of the District Commissioners, will be able to outline a schedule and plan for the project.

Deliverables:

- Draft schedule and plan.
- Identification and acquisition of relevant data, reports and resources.
- Roster of the available documents and a repository for them.

Second and Third Month (one or two days on site)

Second Site Visit: Maureen Sullivan will spend up to two days on site to conduct interviews, collect and review documents and possibly facilitate community meetings. This information and data gathering will be the foundation for the set of recommendations.

Deliverables:

- Draft document that describes the needs, issues to be addressed, and an initial set of recommendations. These will form the basis of the Master Plan called for in Section III of the RFP.

Community Survey

BERK proposes a collaborative survey design process with substantial discussion about what answers and insights are desired from the survey, the strengths and limitations of using a web-based survey to address these questions, and the final questions and question formats to be used. BERK staff will provide expert guidance on survey design and work collaboratively with Library team members to ensure the content of the survey is tailored to meet Trumbull Library's needs.

A draft survey instrument will be designed collaboratively with Library staff and participants in the strategic planning effort. A full test of the draft survey will be used to ensure questions are understandable, survey length is reasonable, and analysis of results is meaningful. This trial run will involve a test audience and a

mock-up of survey results, clearly showing the types of reporting and conclusions supported by the survey instrument.

BERK staff will provide ideas and advice to Library staff in extensively promoting the survey via the Library website, catalog, and other communications tools, as well as via local media, social media, and partners such as community-based organizations and schools. Specific efforts can be made to encourage non-users to participate in the survey.

In addition to the online survey, a limited number of printed copies may be made available for patrons who are more comfortable in a paper format. If appropriate, the survey may be translated to relevant languages other than English. BERK will rely on library staff and/or volunteers for translations and input of paper-based survey results.

BERK staff will analyze the survey results and create a draft report for review by Library staff and strategic planning participants. A final report will then be created reflecting the input of these groups

Deliverables

- Draft and final survey instruments, including versions for users, non-users, and patrons who prefer to respond in a paper format.
- Descriptive text for use in promoting the survey to community members.
- Survey results:
 - Raw and tabulated data for use by Library staff if desired.
 - A rich and readable report of our analysis and findings.
 - Phone- and web-based discussion of findings with Library staff and strategic planning participants.

Fourth Month

Maureen Sullivan and BERK Consulting will analyze the survey data and all of the information gathered. Together they will prepare a draft Master Plan for submission to the District Commissioners. Upon completion of this draft, Maureen Sullivan may meet on site with the District Commissioners and, possibly the Library Executive Director, to review and discuss the recommendations.

Deliverable

- Draft Master Plan

January 23, 2015

Fifth Month

Completion of the Master Plan

The consultants will prepare and submit the final Master Plan.

Deliverables

- The final plan
- A proposed plan for dissemination and promotion of the plan, if desired by the client

Cost Proposal:

While the two consultants will work in collaboration to accomplish this work, each will be a separate party.

For Maureen Sullivan:

Consulting Fee: \$12,000.00 - \$15,000.00

(Four to five days on site at \$3,000.00 per day)

Travel: \$1,600.00 - \$2,400.00

(\$800.00 per visit; 2 or 3 visits)

For BERK Consulting:

User Survey (online or print) \$5,000 - \$7,000

Support for Master Plan Development \$2,000 - \$3,000

Master Plan Layout \$1,000 - \$2,000

Total: \$21,600 – 29,400

Note: Telephone calls, site visit preparation and other off-site work are included in the consulting fee. I will only charge for the time contributed to the project. There are no fringe benefits costs, indirect costs or profit. The only reimbursable expenses are those included in the estimate for travel above (airfare, hotel, ground transportation and meals).

January 23, 2015