

Strategic Plan Development, Consulting and Facilitation Services

Phase 1 – Initial Project Meeting and Information and Data Gathering – \$1,975.00

- *Initial Project Meeting and Community Conversation Planning - \$ 725.00*
 - WiLS will work with the library director to form a planning committee that will lead this process for the library.
 - WiLS will meet with the planning committee for a 2-hour session to start the planning process. This will include:
 - Review of roles, timeline and expectations of the planning process.
 - WiLS will provide the library with training and tools for designated library planning committee members to hold conversations with the community to gather information about how the library can align its resources and services to support the community in reaching its aspirations and addressing its challenges.
 - WiLS will:
 - Facilitate a community mapping process to identify potential conversation participants.
 - Provide participant invitation and conversation logistics best practices.
 - Provide toolkit and training for holding the conversations. This includes:
 - Facilitation guide and questions.
 - Sample note and theme documentation for capturing conversations.
 - Practice conversation session.
 - Should the library desire, instead of the library being equipped to engage the community through conversations, WiLS can facilitate any community conversations. The rate for this is \$480.00 per conversation.

- *SWOT analysis with a focus group of library staff - \$800.00*

- WiLS will coordinate a process and facilitate a 3-hour in-person meeting of a focus group of library staff to perform a Strengths, Weaknesses, Opportunities and Threats analysis. WiLS will work with the planning committee to identify a focus group selection process. WiLS will document and theme information gathered during this process to be shared as part of the information gathered with the planning committee for developing the strategic plan.

Community Information and Data Assessment

- Demographic and Economic Data Assessment - \$225.00
 - Using data and tools from American Fact Finder, WiLS will identify and assess relevant demographic and economic information in the library's community.
- DPI Annual Report Data Comparison - \$225.00
 - Using data and information provided to DPI in annual library reports, WiLS will do a comparison with other libraries with comparable population and revenues to assess service results, costs and trends.

- Challenges / problems
 - Good communicators
 - Responsive
 - Happy w/ outcome

Phase 2 – Community Survey –\$1,200.00 - \$2,350.00

- *Standard* – \$1,200.00
 - WiLS will work with the library to administer a community survey to area residents. The survey will focus on the broader community and its perceptions of the library, in addition to specific service and usage questions. The library, with input from WiLS, will promote the survey to area residents through channels that will likely result in getting a high response rate. The survey WiLS has developed is a standardized survey we use with libraries for strategic planning. Request for customization will require discussion and may result in the need for an adjusted quote for this component.
- *Random* – \$1,000.00
 - Additional cost to administer the standard survey via random sampling to better reach non-users and better reflect demographics of the community. This includes purchasing 4,000 email addresses and additional time for analysis according to different demographics.
- *Spanish* – \$150.00
 - Additional cost to provide Spanish translation of the survey. This does not include a separate analysis of responses to the Spanish version of the survey. The library planning committee will be provided the raw data from the responses. If there is a significant level of response and the library would like a separate analysis of the results, WiLS can provide this analysis at the cost of \$75.00 per hour, not to exceed 10 hours.

Phase 3 – Strategic Plan Development – \$3,225.00

- *Data and Information Webinar Review* - \$900.00
 - WiLS will develop and deliver a 1.5-hour webinar to review the data and information gathered in Phases 1 & 2 with the library planning team before the strategic plan development meeting. The committee will be provided a slide deck of the compiled information along with the data used for the slide deck.
- *Develop Foundational Elements of Strategic Plan* - \$500.00
 - WiLS will coordinate a process and facilitate a 2-hour in-person meeting of participants as selected by the library planning team to review and revise foundational plan elements, including mission and vision statement and core library values, to serve as foundational cornerstones to guide the development of strategic service goals and initiatives.
- *Strategic Plan Development Meeting* - \$1,025.00
 - WiLS will develop processes and provide facilitation services for a 4-hour in-person strategic plan development meeting of the library strategic planning team. The result of this meeting will be identification of strategic service goals for the library and initiatives that can be done to reach the goals.
- *Implementation, Communication and Ongoing Planning Process Development* - \$800.00
 - Following the development of the strategic plan framework, WiLS will facilitate the development of a framework for an ongoing planning assessment, prioritization, implementation and communication process that will be scheduled and coordinated on an annual basis to align with the library's budget planning calendar. This includes administering a plan activity prioritization survey prior to 4-hour in-person session to provide the library with a toolkit for the library to project plan and assess strategic plan goals and activities.

Phase 4 – Writing the Strategic Plan Document - \$1,200.00.

- WiLS will compile the results of the planning meetings to include with other documentation, including, when relevant, the data and information gathered, assessed and summarized during the course of the planning process report, to develop and write a strategic plan document.
- WiLS will coordinate a schedule with the library to complete writing the plan. This schedule will include coordination for library committee input to create a final draft for presentation to the library board.
- WiLS has allocated 16 hours for writing the strategic plan document. If additional writing time is requested beyond the 16 hours as it will be scheduled with the library in the previous bullet point, an adjusted cost for this component will be required.



Overview of WiLS Strategic Planning Approach

As part of the Wisconsin library community, we bring strong relationships, a solid understanding of the Wisconsin library landscape, and an awareness of techniques and processes being employed throughout the state. We see the strengthening of relationships between the library and the community as key outcome to a successful strategic planning process and, thus, our planning process has the community as the central focus of the process.

Our goal with a strategic planning process is to not only work with the library to identify opportunities, needs and issues through data gathering and community engagement to create the framework and vision of the strategic plan, but provide the library with tools to empower the library to continue to assess opportunities and engage with the community on an ongoing basis.

WiLS (Wisconsin Library Services) was first established in 1971. Since that time our organization has evolved as a non-profit, member driven organization to work with libraries throughout Wisconsin providing a number of services to help members turn ideas into action and increase their potential through collaboration. In 2013, WiLS went through a reorganization process that resulted in a redesign of services with consulting services, including strategic planning, being one of the core services of the reorganization.

Our goal is to develop processes that strengthen our members, and, therefore, the overall Wisconsin library community. Through thoughtful conversation, we work closely with our members to determine the best course of action for them to reach their goals within their existing budget. We find ways to leverage existing resources and partnerships as appropriate.

Completed strategic planning projects in the past three years

Library Systems

Milwaukee County Federated Library System, Strategic Plan for 2015-17

BRUCE GAY

414-286-8149

BRUCE.GAY@MCFLS.ORG (NOW AT WAUKESHA P.L.)

Nicolet Federated Library System, Strategic Plan for 2015-17

MARK MERRIFIELD (RETIRED)

Waukesha County Federated Library System (Now Bridges Library System), Strategic Plan for 2015-17

CONNIE MEYER

262-896-8081

CMEYER@BRIDGESLIBRARYSYSTEM.ORG

Winding Rivers Library System, Strategic Plan for 2016-17

KRISTEN ANDERSON

608-789-7119

KRISTEN@WRSLWEB.ORG

Follow up w/ References for info

Public Libraries

Columbus Public Library, 2015 Strategic Plan

CINDY FESEMYER 920-623-5910 CINDY@COLUMBUSPUBLICLIBRARY.INFO

Community Public Library, Strategic Plan for 2017-22

LEEANN BRIESE 262-843-3348 LBRIESE@COMMUNITYLIB.ORG

L.E. Phillips Memorial Library (Eau Claire), Strategic Plan for 2016-20

JOHN STONEBERG (RETIRED)
MARK TROENDLE 715-839-5001 MARKT@EAUCLAIRE.LIB.WI.US

Fond du Lac Public Library, Strategic Plan for 2017-22

JONMARK BOLTHOUSE 920-322-3959 BOLTHOUSE@FDLPL.ORG

Dwight Foster Public Library (Fort Atkinson), Strategic Plan for 2016-20

AMY LUTZKE 920-563-7790 ALUTZKE@FORTLIBRARY.ORG

Jefferson Public Library, Strategic Planning in 2016

LEANN SCHWANDT LEHNER 920-674-7733 LLEHNER@JEFFERSONWILIBRARY.ORG

Johnson Creek Public Library, Strategic Plan for 2015-2018

LUCI BLEDSOE (RETIRED)

L.D. Fargo Public Library (Lake Mills), Strategic Plan for 2016-20

GERARD SAYLOR 920-648-2166 GERARDSAYLOR@LAKEMILLS.LIB.WI.US

Menomonee Falls Public Library, Strategic Plan for 2017-22

KAROL KENNEDY 262-532-8931 KKENNEDY@MENOMONEE-FALLS.ORG

Muskego Public Library, Strategic Plan 2017-19

PETE LOEFFEL (NO LONGER AT THE LIBRARY)

Sun Prairie Public Library, Strategic Plan for 2017-22

SVETHA HETZLER 608-825-0900 SHETZLER@SUNLIB.ORG

Pauline Haass Public Library (Sussex), Strategic Plan for 2017-19

KATHY KLAGER 262-246-5180 KBKLAGER@PHPL.LIB.WI.US

Karl Junginger Public Library (Waterloo), Strategic Plan for 2017-2020

KELLI MOUNTFORD 920-478-3344 KMOUNTFORD@WATERLOO.LIB.WI.US