



April 2024

# Proposal for Strategic Plan Development, Consulting, and Facilitation Services

Manitowoc Public Library

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## Overview

WiLS, in partnership with the Manitowoc Public Library, will provide consulting and facilitation services in order to create a five-year strategic plan. The planning process project will have three main phases, with a potential for a fourth:

1. Setting the stage for planning
2. Stakeholder engagement
3. Strategic plan development
4. Meaningful assessment of your strategic plan

The Manitowoc Public Library and WiLS will engage various stakeholders to learn more about their aspirations for the community and their needs for the library. Community engagement will

be supplemented with robust quantitative data collection and analysis to ensure the strategic plan will be data-informed and meet the needs of the community and the library.

## Deliverables and Cost

Each phase is customizable in order to make sure your library has the process that will result in an inspirational and achievable strategic plan. The items that we minimally recommend are bolded. For any meetings that require travel, the cost will reflect travel time and mileage (\$1,356.00 per travel event). Not all meetings benefit equally from being in person, and WiLS is able to conduct all aspects of the planning process virtually.

Project Phase & Associated Activities	Description	Tentative timeline
<b>Phase 1: Setting the Stage</b>	In this phase, we will kick off the strategic planning process with a look at community demographics. At a virtual kick-off meeting with the strategic planning team, we will get to know each other, discuss the process, and begin to identify community members for interviews.	Late summer 2024
	<i>Demographics workbook</i>	WiLS provides a snapshot of the library's service area/community demographics, pulling from different federal and state data resources. The planning team will use the information gathered during this process to develop a stakeholder map.
	<i>Planning team questionnaire</i>	WiLS will administer a questionnaire to the planning team to develop an understanding of library and community aspirations, issues, and needs. The entire board can complete this questionnaire.
	<i>Strategic Planning kickoff meeting (virtual)</i>	WiLS will facilitate a 90-minute virtual kickoff meeting with the Strategic Planning planning team. The meeting's agenda will include <ol style="list-style-type: none"> <li>1. An overview of the process, including the phases and associated activities, to develop a timeline/calendar for the process</li> <li>2. An overview of the planning team's role</li> <li>3. Review of demographics and questionnaire responses</li> <li>4. Time for questions and suggestions</li> </ol>

<b>Phase 2: Stakeholder Engagement</b>	We believe that hearing directly from the community, including library staff, helps your library make the best decisions for its future.	Fall 2024
<i>Library Staff SOAR</i>	WiLS will coordinate and facilitate a three-hour meeting of library staff utilizing the SOAR method (Strengths, Opportunities, Aspirations, and Results). This meeting will be held using in-person facilitation.	
<i>Library Board Conversation</i>	WiLS will facilitate a 1-hour discussion of the library board. This discussion will focus on gathering information about the challenges and aspirations of the community and the strengths, opportunities, and aspirations of the library.	
<i>Community survey</i>	<p>WiLS, in partnership with the library, will administer a community survey available online and in hard copy. The time and cost reflected here are for the base community survey, which asks questions to understand usage, perception, and satisfaction related to library services, as well as optional basic demographic questions and any appropriate comparisons to the library's last community survey completed with WiLS. Additional questions or extensive edits to the base survey may result in additional hours and costs. WiLS will include survey promotion tips in the broader communications plan.</p> <p>WiLS will analyze the survey results. Top-level findings will be shared in the data webinar.</p>	
<i>Data Dashboard Access &amp; Tour (virtual)</i>	<p>The planning team will be given access to a dashboard created and hosted by WiLS. This dashboard takes DPI Annual Report data into a visualized format that allows you to see an individual library's data for up to the previous five years and a look at your library compared to a cohort average of similar libraries, identified through statistical modeling. The dashboard also includes some basic descriptive statistics of specific measures.</p> <p>This includes access to the dashboard for the period of the project as well as an hour-long virtual tutorial with WiLS' Data Analyst to walk planning team members through how to use the dashboard.</p> <p>Top-level findings will be shared in the data webinar.</p>	
<i>Stakeholder interviews</i>	<p>WiLS, with assistance from the library, will coordinate a series of 30 to 45-minute 1:1 interviews with library and community stakeholders. The interviews will provide qualitative data and insight into community strengths and opportunities and what catalyzing role the library might play.</p> <p>The interviews may be conducted by WiLS virtually or by phone.</p>	

		<p>OR, WiLS can do a 90-minute staff training to build the library's capacity and save on cost by conducting internal virtual, phone, or in-person interviews. It is possible to do a combination of these efforts.</p> <p>Detailed notes will be taken at each interview (WiLS- or library-facilitated). WiLS will theme the interview notes and present the findings at the data webinar.</p>
	<i>Three-question survey for a specific group (optional)</i>	Working with library staff, WiLS will develop a "three-question" survey for staff to administer to identified patron groups (i.e., Spanish-speaking population, teens, etc.).
	<i>Community Q&amp;A boards - in-library (optional)</i>	<p>WiLS will provide a basic handout and a how-to for library staff on creating community "Q&amp;A" boards at library locations. This passive, interactive activity will pose a set of future-facing questions to explore community strengths, opportunities, and possible roles for the library.</p> <p>Note: This activity will require 3-4 hours of library staff time to prep and set up the stations, monitor them throughout their "open" period, and then to take and share photos of the responses with WiLS. WiLS will theme the responses and present the findings at the data webinar.</p>
<b>Phase 3: Development of the Strategic Plan &amp; Strategic Plan Deliverable</b>		<p>WiLS will meet with the planning team to review the data and information gathered and develop a strategic plan that establishes goals and measurable objectives for the next years at the library.</p>
	<i>Data Webinar (Virtual)</i>	WiLS will develop and deliver a 1.5-hour webinar to review the data and information gathered with the Strategic Plan planning team before the strategic plan development meeting. This webinar will be recorded for anyone from the committee who cannot attend. The committee will be provided a slide deck of the compiled information and the data used for the slide deck.
	<i>Theming Worksheets</i>	WiLS will provide planning team members with a worksheet to capture their ideas about themes and important ideas that emerged during the data and information gathering phase.
	<i>Framework Meeting (in-person or virtual)</i>	WiLS will develop processes and provide facilitation services for the planning team's 2-hour strategic plan development meeting. The result of this meeting will be the strategic plan's goals and objectives.
	<i>Plan Writing</i>	WiLS will compile the results of the planning meetings to include with other documentation to develop and write a strategic plan document. WiLS will coordinate a schedule with the library to finish writing the plan and obtain any feedback from appropriate stakeholders. WiLS allocates 16 hours for writing the strategic plan document. If additional writing time is requested beyond the 16 hours, an adjusted cost for this component will be required.

<b>Phase 4: Meaningful Assessment of Your Strategic Plan</b>		Winter 2024
	<i>Assessment meeting (virtual)</i>	<p>Regular assessment and evaluation of your plan can provide clarity on implementing your strategic plan and seeing your library's achievements of its goals. Working with WiLS' data analyst, the library will learn how to set meaningful benchmarks and assess their strategic plan efforts. This will include a two-hour training session with up to 6-8 staff participants and tools and templates to easily and routinely assess efforts.</p>
<b>Communication and Project Management Work</b>	Time held for communication with the main point(s) of contact for the project and ensuring the project runs smoothly throughout the timeline.	Ongoing

## Cost to Perform

The cost for each phase and activity is outlined in the table below.

Phase & Activity	Cost
<b>Phase 1: Setting the State</b>	<b>\$ 1,276.00</b>
Demographics workbook	\$ 348.00
Planning team questionnaire	\$ 348.00
Strategic Planning Team Kickoff Meeting (virtual)	\$ 580.00
<b>Phase 2: Community &amp; Staff Engagement</b>	<b>\$ 5,300.00 - \$ 9,907.00</b>
Library Staff SOAR (in person)	\$ 928.00 + \$ 1,356.00
<i>Board conversation (virtual and optional)</i>	\$ 525.00
Community survey	\$1,624.00
Data Dashboard access & tour (virtual)	\$ 580.00
Stakeholder interviews - completed by WiLS	\$174.00 per interview - up to 10 (no more than \$ 1,740.00)
Stakeholder interviews - completed by the library, with WiLS support	\$ 464.00
<i>Community Conversation (optional)</i>	\$ 464.00 (virtual) + \$ 1,356.00 (in-person)
<i>Three Questions Survey (optional)</i>	\$ 580.00
Community Q&A boards	\$ 348.00
<b>Phase 3: Development of the Strategic Plan &amp; Strategic Plan Deliverable</b>	<b>\$ 4,640.00 - \$ 5,996.00</b>

Data webinar (virtual)	\$ 1,392.00
Framework meeting	\$ 1,392.00 (virtual) + \$ 1,356.00 (in-person)
Plan writing	\$ 1,856.00
<b>Phase 4: Meaningful Assessment</b>	<b>\$ 928.00</b>
<i>Assessment meeting (virtual and optional)</i>	\$ 928.00
<b>Note: Travel (per travel event)</b>	<b>\$ 1,356.00</b>
<b>TOTAL ACTIVITY COST RANGE</b>	<b>\$ 11,216.00</b>
<b>Communication and Project Management Work</b>	<b>\$ 2,243.00</b>
<b>TOTAL PROJECT RANGE</b>	<b>\$ 13,459.00 - \$20,461.00</b>

\*The lower range total does not include optional components and defaults to virtual meetings in many cases, except the staff SOAR. It also only includes library-led interviews. The higher total reflects more in-person and/or direct facilitation from WiLS and includes travel costs for selected meetings and the optional assessment meeting. We are happy to customize and refine the process to your library's needs. The higher total would not be exceeded.

Communication and project management work accounts for the communications and tasks associated with keeping the project on schedule, such as drafting communications between stakeholders, scheduling and coordinating work, sequencing or staging activities, and other administrative tasks that comprise the project phases.

The prices and timeline in this proposal are locked in for 60 days from the sharing date. Should the library need more time to make a decision, WiLS may need to revise the proposal

## Key Staff

When you hire us, you get the whole team. WiLS' service experts have diverse skills and experiences and can be brought in, as needed, on any project. This keeps us flexible and responsive to the needs of different projects and helps us keep our eyes on the horizon of emerging and innovative practices from various vantage points.



**Melissa McLimans, Library Strategist & Consulting Team Lead**, has over seven years of experience leading strategic planning processes with public libraries and library systems. Melissa has worked with dozens of libraries and community stakeholders to develop, complete, and implement achievable strategic plans that reflect the needs of organizations and their stakeholders. Melissa is well-experienced in data collection, including administering community surveys, leading focus groups, and conducting interviews, as well as facilitating planning meetings and writing strategic plans.

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**Laura Damon-Moore, Library Strategist & Consultant**, partners with her consulting team colleagues to offer manageable and dynamic planning projects that are community and asset-based. She brings a background in community engagement, community-led program development, and youth services, as well as significant project coordination, communications, and writing experience as co-founder of the Library as Incubator Project and @IArtLibraries. In addition, Laura has a certificate in Asset-Based Community-Led Development (ABCD), which she uses as a lens for much of her work with libraries.

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**Kim Kiesewetter, Data Analyst & Consultant**, works on a variety of library-centric, data-driven projects with the WiLS consulting team. She brings with her over a decade of research and evaluation experience. Her background in the social sciences provides a foundation for her work, including extensive training in evaluation, research methods, and statistical analysis. Her approach to projects is warm, open, and accessible, and focuses on intuitive and accessible deliverables.