

**REQUEST FOR PROPOSAL**  
**Strategic Planning**  
**Southern Maryland Regional Library**  
**Charlotte Hall, Maryland**

**Introduction**

The Southern Maryland Regional Library Association, Inc. (SMRLA) seeks a consultant to develop a comprehensive strategic plan for the Regional Library and a strategic plan for each of the three county library systems receiving service through SMRLA. Specifically, the four libraries expect plans that include broad initiatives/goals and measurable objectives to meet the needs of the libraries' systems and the region for the next five years. Each plan should also address the potential implications of the proposed goals for each library's programs, services, collections, technology, staffing and facilities. These plans will examine the region's growth patterns and demographics, and identify the need for services with respect to future trends and emerging technologies. The plans will also identify methods for addressing potentially variable funding patterns. The purpose of the strategic plans is to position SMRLA and the public libraries of Calvert, Charles, and St. Mary's counties to proactively provide services that meet the changing needs of the libraries and our communities in a cost-effective manner.

**Library Backgrounds**

Southern Maryland Regional Library Association, Inc. (SMRLA) is one of three regional libraries in Maryland. It serves as the regional resource center for Southern Maryland as designated by the Maryland Annotated Code, Education Article, § 23-202 to § 23-205. SMRLA is a stand-alone library system with a policy-setting board of trustees. SMRLA is a 501 c (3). Located in Charlotte Hall, MD; SMRLA provides supporting services to the public libraries of Calvert, Charles, and St. Mary's counties. The staff of SMRLA is dedicated to providing services to the libraries that are relevant to the communities they serve and that maximize cooperation in services that each library system would have difficulty providing alone. Services include materials management (ordering, cataloging, processing and delivery), Inter-library loan, training and staff development, and systems services (which includes operating and maintaining a shared Integrated Library System, help desk operations, email services, systems reports, and business analytics). FY2019 funding from the State of MD is \$2.87 million.

Calvert County, Maryland is a peninsula, bounded by the Chesapeake Bay on the east and the Patuxent River on the west. Calvert is home to more than 92,000 people and has one of the highest standards of living in Maryland. Major industries include defense contracting, information technology, tourism and administrative services. The Library consists of four locations: a main library and three branch libraries. A new mobile library is being added in FY19. The library is governed by a seven-member Board of Trustees. The fiscal 2018 budget is \$4,662,018. The library is heavily used. Circulation exceeded 1 million items in FY18 and almost 550,000 customers visited the library during the same period. The library serves as an important focal point of civic and social life by providing relevant classes and events to promote lifelong learning for all ages, space for meetings,

work force development and other community outreach programs. The library enjoys strong support from active Friends and Foundation boards.

Charles County, Maryland is located just 18 miles south of Washington, DC and is bordered by Prince George's, Calvert, and St. Mary's counties. The current population is 154,747. Key industries for Charles County are federal/defense contracting; science/technology; health services; energy and sustainability; and robotics. The library is governed by a seven-member Board of Trustees appointed by the county commissioners. The library system is comprised of four locations, a Mobile Library, and an Outreach Van. The fiscal 2018 operating budget is \$5.6 million. The library is well utilized, with over 900,000 items circulated in fiscal 2018 and over 600,000 visits in the same period. The library is fortunate to have a Citizens for the Charles County Public Library friends group that is dedicated to expanding public awareness about the library, and actively supports all ongoing efforts to serve the Charles County community

St Mary's County, MD is a peninsula where the Potomac River and Chesapeake Bay meet. The site of the first settlement and first capital of Maryland, its economy is driven by the Naval Air Station Patuxent River (home of Naval Air Systems Command and the U.S. Naval Test Pilot School), defense contracting, science/technology/engineering, health services, and tourism. Population is 112,667. The county seat, Leonardtown, is the fastest growing (by percentage) Maryland municipality. The three-branch library system is governed by a seven-member Board of Trustees, appointed by the county commissioners. Fiscal Year 2019 funding is \$3,864,127, primarily from the county and secondarily by the state. Annual circulation of items is 1,559,417, while annual user visits total 597,250. The library has over 40 official community partnerships. It is supported by the Friends of St. Mary's County and the St. Mary's County Library Foundation, which advocate for the library and provide financial support, especially for the building of its new main branch in Leonardtown.

Data snapshot:

<b>Library System</b>	<b>Calvert</b>	<b>Charles</b>	<b>St. Mary's</b>
<b>Population of County</b>	90,527	154,747	112,667
<b>Registered Library Card Holders</b>	73,180		35,700
<b>Annual Number of Items Circulated</b>	1.2 million	900,000	1.56 million
<b>Number of Branches</b>	4	4 + Mobile	3
<b>Number of Annual Visits</b>	600,000	600,000	597,300
<b>Staff FTE</b>			46.6

## Current Strategic Plans

Links to plans:

SMRLA: <https://smrla.org/wp-content/uploads/2016/12/SMRLA-Strategic-Plan-2014-2017.pdf>

Calvert: <https://calvertlibrary.info/wp-content/uploads/2018/04/StrategicPlan16-19.pdf>

Charles: [https://ccplonline.org/wp-content/uploads/ABOUT-CCPL/strategic-plan/2016\\_plan.pdf](https://ccplonline.org/wp-content/uploads/ABOUT-CCPL/strategic-plan/2016_plan.pdf)

St. Mary's: <https://www.stmalib.org/about-us/strategic-plan/>

## Need for the Project

The four library systems need to develop new strategic plans to guide services and resource allocations that will achieve a high rate of return on investment.

The four libraries desire to put in place plans that:

- Are data-driven
- Are realistic in scope
- Address the needs of each library's particular communities
- Articulate a future vision for library service
- Serve as policy documents to guide decisions regarding budget allocation, programs, services, collections, technology and staffing of the libraries

## Budget

It is anticipated that costs for this strategic planning process will not exceed \$75,000. This will include fees, travel expenses, the cost of information gathering and analysis, completion of plan documents for **each** of the four libraries, and all other reimbursable expenses. Each library will receive four printed copies and one PDF of its plan document.

## Project Description

On behalf of the four library systems in Southern Maryland, SMRLA is seeking a professional consultant to:

- Facilitate the strategic planning process using a planning methodology applicable to public and regional libraries or other relevant nonprofit service agencies
- Design an effective method(s) for data gathering and presentation which **may** include, but not be limited to:

- Surveys and focus groups of staff and the public
- An environmental scan of the communities to be served that considers library use patterns, demographic changes, and maximization of return on investment
- Facilitate meetings of the strategic planning committees of each library. The committees will consist of staff and others
- Assist in identifying gaps where the current library operations are insufficient to meet the needs of their communities
- Assist in the identification of service priorities, goals, and objectives of each library

Through this process, SMRLA and the public libraries of Calvert, Charles, and St. Mary's counties expect to have strategic plans in place by July 1, 2019, that will guide the activity and use of resources over the next five years. The process should ensure significant input from a wide range of stakeholders and the plan should reflect that input and idea generation.

### **Scope of Work**

The consultant will assist the four libraries in:

- Determining current use and projecting future demand as affected by:
  - Community needs and expectations
  - Future trends in technology
  - Trends affecting the future of public libraries in general
- Developing an overall structured outline and procedure that determines the type of data to be collected and the appropriate measurement standards to ensure its usefulness in decision-making
- Collecting, reviewing and analyzing data and making recommendations based on the data
- Identifying strategies to build organizational capacity for addressing needs of the libraries and communities served
- The RFP is incorporated by reference into the scope of work.

The consultant will be required to:

- Contribute substantively both orally and in writing to the decision making process for SMRLA and the three county libraries
- Collect, analyze, and present relevant data
- Facilitate planning meetings
- Meet with groups and stakeholders
- Work closely with the strategic planning committees on tasks related to the strategic planning projects
- Present the draft reports to the strategic planning committees for comment
- Present the final plans to each of the library boards

Consultant activities related to the proposed strategic plans for each library should include, but not be limited to the following:

- Ongoing meetings with the appropriate committees and staffs
  - An initial in-person meeting with each of the strategic planning committees should include a discussion of roles and responsibilities of the consultant, the work to be completed, and the projected timetable/schedule for completion
- Assist with the development of the stakeholder list and identifying individuals and groups that should have input
- Assist the four libraries in developing plans to obtain and gather input from the communities of the libraries served
- Review and analyze existing data provided by SMRLA and the county libraries
- Prepare an analysis of market areas and demographic profiles
- Assist the staffs with the development or revision of vision and mission statements
- Assist the four libraries in analyzing services and programs for community impact and cost
- Develop quantitative performance measures
- Develop a strategic planning document that reflects this process

### **Project Timeline**

It is anticipated that the project can begin in February 2019 and be fully completed by July 1, 2019.

### **Selection Criteria:**

SMRLA reserves the right to select a planning consultant based directly on the proposal or to negotiate further with one or more respondents.

SMRLA reserves the right to reject any and all proposals.

A selection committee will evaluate the proposals in accordance with the following criteria:

- Experience and success in strategic planning, including positive experience of completion on time and within budget (50%)
- Experience working with publically funded agencies and/or experience working with regional consortia and/or public library systems (20%)
- Cost to complete the process (30%)

### **RFP Availability:**

This RFP is open from October 15, 2018-November 1, 2018.

Questions should be submitted in writing to Sharan Marshall:

Email: [smarshall@smrla.org](mailto:smarshall@smrla.org)

The SMRLA CEO must receive written questions regarding this request by November 1, 2018.

SMRLA will publish responses to written questions by November 8, 2018.

### **Proposal Content Requirements**

Respondents shall have:

- A cover letter providing a brief description of the firm or individual, name, address of consultant, telephone number, email, and fax of principal contact person
- Brief synopsis of the highlights of the proposal, which should not exceed one page in length, but conveys that the consultant understands of the purpose and expected outcomes of the project
- A list of key personnel who would be involved in the process and their expertise/experience
- A summary of the consultant's qualifications and experience. Professional degrees in strategic planning as well as experience in the administration of libraries are desirable. Firms and their subcontractors will have demonstrated expertise with publically funded operations, technology and facilities. Evidence of successful experience in planning is crucial to the selection
- A work plan that includes a description of the methodology, tasks, timeline, and estimated amount of time that would be spent on the project
- Exclusions or exceptions: Note any parts of the proposal that are beyond the expertise of the consultant, or best handled by library staff
- A schedule of costs for providing planning services, including supplies, number of onsite visits and cost per trip, data gathering and analysis, and other costs associated with the planning process
- References of at least three (3) previous organizations for which the consultant has provided strategic planning service and contact information. Preference will be given to those consultants with library strategic planning experience
- Additional documentation: Consultants are welcome to provide additional documentation that will help SMRLA in the selection process

### **RFP Standards**

- SMRLA will not reimburse costs of preparing the consultant proposals.
- SMRLA reserves the right to cancel the award of contract any time before the execution of the contract by both parties. The responding consultants bear sole risk and responsibility for costs incurred in the preparation and mailing of the proposal.

- SMRLA reserves the right to reject any or all responses to this Request for Proposal.
- The consultant must comply with all applicable requirements of federal and state civil rights laws and statutes and the Americans with Disabilities Act.
- The contract shall be construed, interpreted, and enforced according to the laws of the State of Maryland
- No SMRLA staff member, or staff of the three public library systems served shall have a financial interest in this proposal.
- In cases of disputes over differences of opinions as to the services in the proposal, the decision of the SMRLA CEO shall be final.
- SMRLA reserves the right to ask for clarification in the proposal if the need arises.
- The successful respondent agrees to comply with all Fair Labor Standards and Prevailing Wage Laws where applicable, and assumes all responsibility for fair and equitable hiring practices.
- The respondent is expected to provide evidence of professional liability insurance in the amount of not less than \$1,000,000.

**Respondents must submit four originals and a PDF of the proposal to:**

Sharan D. Marshall, CEO  
Southern MD Regional Library Association, Inc.  
37600 New Market Rd.  
Charlotte Hall, MD 20622  
Email: [smarshall@smrla.org](mailto:smarshall@smrla.org)

Proposals must be received in a sealed package appropriately marked with the proposal title and name and address of the respondent by 3:00 p.m. ET, November 15, 2018. All proposals not received by that date and time will be returned unopened. The SMRLA CEO will notify the consultant chosen within 30 days of the proposal deadline closing.