



March 1, 2024

Richard Gans, Treasurer, Board of Trustees
Leelanau Township Library

The Midwest Collaborative for Library Services (MCLS) is pleased to submit a proposal to assist in the process of developing a comprehensive strategic plan for the Leelanau Township Library. MCLS has collaborated with libraries near Leelanau Township Library on strategic planning, including Elk Rapids District Library, Traverse Area District Library, and Leland Township Public Library, and we have become familiar with the area and have interacted with many community members near Leelanau Township. We are excited for the opportunity to work with your unique community.

MCLS is a non-profit, member-driven organization whose mission is to facilitate sharing resources and to collaborate with other organizations to benefit Indiana and Michigan libraries. We have over 600 member libraries of multi-types in our two-state region. Our services include training and consulting in strategic planning and change management, as well as group purchasing, management of the MeLCat Michigan statewide library catalog, and RIDES, the statewide library courier service. MCLS's office is in Lansing, Michigan with staff located in both Indiana and Michigan. Please see attached Restated Articles of Incorporation as proof of license to operate in the state of Michigan.

MCLS's Engagement, Consulting, and Training team is experienced in facilitating strategic planning for a variety of library sizes and types in Indiana and Michigan. Our organization's focus and clientele are public, academic, school, and special libraries. Our Engagement, Consulting, and Training team have advanced degrees and certifications in library science, non-profits, and facilitation methods, and the team includes four consultants and one assistant.

This proposal is prepared for the Leelanau Township Library based on the information provided in the library's RFP; however, we welcome the opportunity to customize portions of the proposal based on your needs. Any of the services can be adjusted, added, or removed to match expectations and needs more fully. The following proposal is a firm offer for a 90-day period from March 1, 2024.

Please direct any communications to Pamela Sebolt, Manager of Engagement, Consulting, and Training at Midwest Collaborative for Library Services, 1407 Renssen St., Suite 1, Lansing, MI 48910; seboltp@mcls.org; or (517) 489-4069.

With Regards,

A handwritten signature in blue ink that reads 'Scott Garrison'.

Scott Garrison
Executive Director, MCLS



MIDWEST COLLABORATIVE
for LIBRARY SERVICES

Building better libraries

Proposal for Services

Strategic Planning for the
Leelanau Township Library

March 1, 2024

This proposal is valid for 90 days

Executive Summary

Through MCLS's consulting services, we seek to amplify strengths and strive to create intentional, accessible spaces that encourage the cross-pollination of diverse ideas, perspectives, and experiences. MCLS uses a model of strategic planning that combines the aspirations of the community with the strengths of the library to create outcomes that are achievable and impactful. MCLS's methodology uses principles and practices of Appreciative Inquiry, which is a strengths-based approach to planning rooted in the assumption that questions and dialogues about strengths, successes, values, hopes, and dreams are themselves transformational. Rather than a problem-solving approach that focuses on deficiencies, Appreciative Inquiry focuses on peak experiences and best practices. Weaknesses and threats are acknowledged and reframed into opportunities and aspirations. It is a collaborative and highly participative process that results in a co-created and impactful plan.

MCLS will begin with the Preparation phase in which we will help to set the foundation for the planning process by meeting with the Library Director and Planning Contact to lay out the process and timelines, assist in identifying members who will serve on the Strategic Planning Committee, provide information to assist in communicating with library staff and potential Strategic Planning Committee members. We will also facilitate a virtual meeting with the Library Director, Planning Contact, and other relevant staff or Board members who will be collaborating with MCLS to co-create the community survey.

The next phase of the planning process is the Knowledge Gathering phase where we gather data about the community to help inform the planning process. In this phase we turn outward to the community to seek community input through the use of engagement tools developed by The Harwood Institute for Public Innovation. The proposed engagement includes facilitating Community Conversations in combination with one-on-one interviews to gather "public knowledge" about what community members want their community to be; what challenges they face in realizing their aspirations; what changes are needed to overcome those challenges; and how the library can contribute to meeting their aspirations. Community Conversations are 90 - 120-minute conversations facilitated by MCLS. The one-on-one interviews are conducted with community leaders by the library-appointed Strategic Planning Committee. MCLS will compile this "public knowledge," or community input, into a Community Engagement Report that will be used to help your library develop strategies that strengthen the library's relevance and significance in the community.

During this phase, we will also help you gather more general information from the community about library services, technology use, and trends using an online survey instrument. MCLS will compile the information gathered from the community engagement and community survey into a report of current conditions that will help to inform the Strategic Planning Committee in their work. This process will help your library engage others, discover potential community partners, and develop strategies that strengthen the library's relevance and significance in the community.

Once the community information is gathered, we will move on to the Planning phase where we will assist your library in identifying key service priorities that are aligned with local community needs and library strengths. For this phase, we will guide your Strategic Planning Committee through the SOAR framework (strengths, opportunities, aspirations, and results) and then working with key library staff, we will assist you in developing goals, measurable objectives, and timelines, resulting in a strategic plan that increases the library's impact, relevance, and visibility.

Strategic Planning Process Summary

The process outlined below can be accomplished over approximately four to five months from a mutually agreed-upon start date.

If conditions are safe to do so, we can conduct this process on site at your library. We are also able to conduct the entire process in a virtual environment, using virtual collaborative meeting tools such as Zoom, Mural, and Padlet.

Part 1: Preparation

MCLS will meet with the Library Director and Planning Contact in preparation for the planning process.

During this time, the process for the Community Survey will be laid out, and collaborative work will begin to develop the Survey.

The Library Director and Planning Contact will identify and notify participants for the library's Strategic Planning Committee. The Strategic Planning Committee generally consists of 12-15 members and may potentially include the Library Director, department heads, other key staff, 1-2 board members, and representatives of the Friends of the Library group.

The role of the Strategic Planning Committee will be to participate in an initial 2-hour Kick-Off Meeting during which the process and timeline will be laid out and the Committee will strategically identify individuals to participate in the Knowledge Gathering Phase of the planning process; to conduct interviews with identified community leaders and members; and to participate in a half-day retreat to identify the library's core values, vision, and key strategic priorities.

Part 2: Knowledge Gathering

After the Kick-Off Meeting, we will use the public knowledge gathered about your library and community (Community Survey around library services, interviews with community leaders and members, and data from Community Conversations) to gain information about the community's needs relative to the library.

The process of gathering public knowledge is adapted from the Aspirations model of The Harwood Institute for Public Innovation.

- MCLS will meet with the Library Director/Planning Contact to co-create an online survey to gain input on library services that will be made widely available in the community. MCLS will provide the online survey tool and a print document version of the survey and will compile a final report from the survey data.
- MCLS will facilitate a 2-hour Kick-Off Meeting with the Strategic Planning Committee to outline the planning process and strategically identify individuals to participate in the Knowledge Gathering phase. MCLS uses a process to help identify community stakeholders and to ensure library users and non-users are engaged.
- The Strategic Planning Committee members will conduct interviews with approximately 30-50 community leaders total. This process serves to more deeply involve the Committee members in the process, and also assists in expanding community connections and identifying potential partners for the library.
- MCLS will facilitate, record*, and theme five Community Conversations to engage up to approximately 60-80 community members face-to-face.
- MCLS will compile the information gathered from the interviews and Conversations into a themed Community Engagement Report about the community's aspirations, their concerns, and how the Library might help.
- MCLS will provide the Community Engagement Report and Community Survey Report to the Library.

**NOTE: The recordings of the Conversations are solely for MCLS consulting staff with the purpose of capturing information to write the Community Engagement Report. Recordings will be deleted as soon as we have captured necessary information from them. The recordings will not be used or released outside of MCLS as they contain potentially confidential and identifiable information.*

Part 3: Planning

- MCLS will facilitate a half-day retreat with the Strategic Planning Committee to review the community input and use the SOAR methodology to develop the mission, core values, vision, and key strategic priorities.
- MCLS will facilitate another half-day Operational Retreat during which the Library Director and key staff members (usually 8-15) will review the community input, vision, values, and key priorities. At this retreat, staff will operationalize the plan by developing goals and refining activities that the library might implement to accomplish the key priorities. At this time, they will address organizational competencies: things that must be taken care of at the organizational level to achieve the goals, such as reviewing funding, policies, procedures, technology, staffing, etc. They will also draft output and outcome measures for assessing progress.
- Following the Operational Retreat, MCLS will create a draft of the Plan.
- MCLS will work closely with the Library Director to prepare the final plan document, including a virtual meeting.
- MCLS will electronically deliver a final text document version of the plan that includes an acknowledgement outlining the planning process; an executive summary; space for a letter from the Director; the library's vision statement, core values, and key strategic priorities; the goals, objectives, and potential activities for each strategic priority;

outputs from the engagement and planning processes including the Community Survey Report; as well as data from the Strategic Planning Retreat and key staff Operational Retreat.

- MCLS will facilitate a final virtual meeting with the Library Director and key staff to provide assistance and guidance in developing an Implementation Timeline and Measurement Plan framework.

Proposed Work Schedule

Task	Planning Activity	Month
Task 1	Design the planning process (Meet with consultant)	Month 1
Task 2	Start the planning process (Establish Strategic Planning Committee)	Month 1
Task 3	Co-create Community Survey and discuss survey process (Meet with consultant)	Month 1
Task 4	Kick-Off Meeting with Strategic Planning Committee to introduce the process & strategically identify community members to engage (Meeting facilitated by consultant)	Month 2
Task 5	Knowledge Gathering (Conduct Community Survey, Planning Committee interviews community leaders, consultant facilitates Community Conversations)	Month 2
Deliverables	Community Engagement Report and Community Survey Report	Month 3
Task 6	Planning Committee Retreat - Planning Committee selects core values, vision, and key service priorities (Retreat facilitated by consultant)	Month 3-4
Task 7	Key Staff Operational Retreat - write goals and objectives, activities, organizational competencies (Retreat facilitated by consultant)	Month 4
Task 8	Write the Strategic Plan	Month 4-5
Deliverables	Written Strategic Plan, Framework for Implementation Timeline, Framework for Measurement Plan	Month 4-5

Costs

The costs for strategic planning services are outlined below and include a “not to exceed” cost for the full-service package. Prices include all clerical costs, printing costs, facilitation supplies, consulting costs, data analysis costs, and insurance certificates necessary. This proposal is made in good faith, without collusion or connection with any other person(s) proposing for the same work.

Knowledge Gathering

- MCLS designs and analyzes community online survey \$2,000
- MCLS conducts 5 Community Conversations and compiles Report \$6,500
combining data from the community leader interviews and Conversations

Meeting/Retreat Facilitation, Preparation, and Supplies

- Initial 2-hour Kick-Off Meeting with Strategic Planning Committee
- Half-day Retreat with the Strategic Planning Committee to review the community input and to develop the core values, mission, vision, and key strategic priorities.
- Half-day Operational Retreat during which the Director and key library staff review the community input, vision, core values, and key strategic directions. Staff will develop goals and potential strategies that the library might implement to accomplish the key strategic directions. They will also draft output and outcome measures for assessing progress. The product of this retreat will be a draft strategic plan.
- Two (2) additional 1-hour virtual meetings to complete the written plan and deliver frameworks to assist in the development of an Implementation Timeline and Measurement Plan.

Meeting/Retreat Facilitation, Preparation, and Supplies Cost	\$8,000
Written Plan	\$4,000
Total not-to-exceed cost for full-service planning	\$20,500

Payment of the fee is broken down and tied to project deliverables:

\$8,500	Upon completion and electronic delivery of the Community Survey Report and Community Engagement Report.
\$8,000	Upon completion of the Kick-off meeting, Strategic Planning Committee Retreat, and Key Staff Operational Retreat
\$4,000	Upon completion and electronic delivery of the written plan

Additional Work

Additional work outside of the scope of this proposal can be completed with approval from both the library and MCLS at a rate of \$150 per hour.

Qualifications of Firm and Prospective Team Members

MCLS is a collaborative organization partnering with Indiana and Michigan member libraries, product vendors, and other library entities to provide informational content, operational services, and personal oversight designed to assist libraries in helping themselves better relate to the patrons and communities they serve. We have worked with several libraries on full- or partial-service strategic planning and have facilitated multiple other meetings for libraries.

A project lead would be assigned to the Leelanau Township Library's strategic planning process, while the project assistant and other consultants may assist with the project. All project staff will conduct Community Conversations and facilitated retreats in-person; other preparation meetings may be conducted virtually or in-person with agreement between the Library Director and MCLS. Resumes for consultants available upon request.

Project Personnel

Pam Sebolt, Manager of Engagement, Consulting, and Training

Pam has over 20 years' experience in public libraries in various capacities, including in management, public services, technical services, technology, programming, and outreach services. She brought this experience to the Midwest Collaborative for Library Services (MCLS) where she gained experience as a Community Engagement Librarian and Library Strategist and now works with multi-type libraries throughout Indiana and Michigan as the Manager of Engagement, Consulting, and Training. Pam has led multiple strategic planning consulting projects with MCLS.

Pam has been trained as a Public Innovator through the American Library Association/Harwood Institute's Public Innovators Lab, as well as a World Café Host through Fielding Graduate University, and has facilitated multiple Community Conversations and kitchen table talks. She is also a certified Appreciative Inquiry Facilitator through the Center for Appreciative Inquiry, and has given presentations at local, state, and national conferences. Pam's educational background includes a B.S. in Child Development and Family Studies with a minor in History and an M.L.S. from Indiana University Purdue University Indianapolis.

Lissa Krull, Library Strategist

Lissa came to MCLS in early 2020 with over 25 years of experience in public library administration, marketing, and consulting. She has a passion for educating, motivating, and inspiring library staff to reach their fullest potential and become essential resources in their own communities.

Lissa has been trained as a Public Innovator through the American Library Association/Harwood Institute for Public Innovators Lab and has facilitated multiple Community Conversations. She is also a certified Appreciative Inquiry Facilitator through the Center for Appreciative Inquiry. Lissa has B.A.'s in Communication and Education from Purdue University and an M.L.S. from Indiana University-Purdue University, Indianapolis.

Jenny Kobiela-Mondor, Library Strategist

Jenny joined the MCLS team as a Library Strategist in 2021. Previously, she was the Assistant Director at Eckhart Public Library in Auburn, Indiana. Jenny has a B.A. in Journalism & History, a Certificate in Jewish Studies from Indiana University Bloomington, and a Masters in Library Science from Indiana University-Purdue University Indianapolis. She has completed a certification course in Creating Wellbeing, has attended The Harwood Institute's Public Innovators Lab, and has education and experience in a variety of areas, including change management, appreciative inquiry, community engagement, emotional intelligence, inclusivity, and intellectual freedom. She has presented and facilitated in-person and virtual trainings on a variety of library-related topics.

Jan Davidson, Library Consultant

Jan has worked in nonprofits for more than nineteen years, focused heavily on program development and management; volunteer recruitment, training, and management; and small- and large-group facilitation. She has worked at the Midwest Collaborative for Library Services (MCLS) since 2016 and currently serves as Library Consultant on the Engagement, Consulting, and Training team.

Jan has been trained as a Public Innovator through the ALA/Harwood Institute's Public Innovators Lab, has a Project Management for Learning Professionals Certificate from the Association for Talent Development, and is a certified Appreciative Inquiry Facilitator through the Center for Appreciative Inquiry. She completed the Developing Leaders Program for Nonprofit Professionals through the Executive Education program of Columbia University Graduate School of Business and holds a Certificate in Youth Ministry from the Center for Ministry Development. Jan has a B.A. in Interpersonal Communication with a minor in Comparative Religion from Western Michigan University.

Gwen Haviland, Project Assistant & Training Coordinator

Gwen has worked at MCLS since 2016 and previously worked in the auto industry in Quality Control. Gwen provides support for the ECT team, compiling data for Strategic Planning related to usage stats, benchmarking, demographics, and surveys. She is also the Training Coordinator for MCLS and key contact for MCLS Membership renewal. Gwen has a Bachelor of Science in Industrial Engineering degree from GMI Engineering & Management Institute (now Kettering University) as well as a Master's in Business Administration from the University of Michigan – Flint.

Past and Current Clients

The following is a partial list of past and current clients of MCLS's consulting services for Strategic Planning and/or Meeting Facilitation.

- Hussey-Mayfield Memorial Public Library (IN)
- Butler University Libraries (IN)
- Clarke Historical Library, Central Michigan University (MI)
- Noble County Public Library (IN)
- Monticello-Union Township Public Library (IN)
- Roseville Public Library (MI)
- Elk Rapids District Library (MI)
- Ferndale Area District Library (MI)
- Manistee County Library (MI)
- Indiana Library Federation (IN)
- Plainfield-Guilford Township Public Library (IN)
- Culver-Union Township Public Library (IN)
- Westchester Public Library (IN)
- Garrett Public Library (IN)
- La Porte County Public Library (IN)
- Traverse Area District Library (MI)
- Anderson Public Library (IN)
- Hamilton East Public Library (IN)
- Oscoda County Library (MI)
- Michigan State University Libraries (MI)
- Suburban Library Cooperative (MI)
- Chippewa River District Library (MI)
- Kalamazoo Public Library (MI)
- Knox County Public Library (IN)
- Central Michigan University Libraries (MI)
- Paw Paw District Library (MI)
- Indiana State Library (IN)
- Branch District Library (MI)
- Syracuse Turkey-Creek Township Public Library (IN)
- Leland Township Public Library (MI)

References

- Pamela Williams, Library Director, Elk Rapids District Library, Elk Rapids, MI, erlib.director@gmail.com, 231-264-9979
- Michele Howard, Library Director, Traverse Area District Library, Traverse City, MI, mhoward@tadl.org, 231-932-8528
- Sandy Petrie, Director, Noble County Public Library, Albion, IN, spetrie@myncpl.us, 260-636-7197

Sample Work

MCLS does not own the information or plans from previous clients and maintains their confidentiality; however, some previous clients have made their plans available publicly on their websites.

- Elk Rapids District Library (MI) – [Strategic Plan](#)
- Monticello-Union Township Public Library (IN) – [Strategic Plan](#)
- Traverse Area District Library (MI) – [Strategic Plan](#)
- Plainfield-Guilford Township Public Library (IN) – [Strategic Plan](#)
- Westchester Public Library (IN) – [Strategic Plan](#)

Contact Information

To discuss this proposal, please contact:

Pamela Seabolt
Manager, Engagement, Consulting, and Training
Midwest Collaborative for Library Services (MCLS)
1407 Rensen St., Suite 1
Lansing, MI 48910
Phone: 517-489-4069
Email: seaboltp@mcls.org

Agreement for Services

By Leelanau Township Library

Signature _____ Date _____

Printed Name _____ Title _____

By MCLS

Signature _____ Date _____

Printed Name _____ Title _____