



# **Strategic Planning and Potential Facilities Study Consulting Services**

**Leelanau Township Library**

Prepared by ReThinking Libraries  
March 12, 2024

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Rick Gans  
Treasurer, Board of Trustees  
Leelanau Township Library  
119 E. Nagonaba Street  
Northport, MI 49670

Rick,

We appreciate the opportunity we had to discuss your needs and ReThinking Libraries is pleased to submit a proposal for consulting services to assist in developing a *Strategic Plan and a Potential Facilities Study* for the Leelanau Township Library (LTL). We would welcome the opportunity to collaborate with your library. Our full-service team is well-positioned to help LTL develop a plan through a process that seeks to elevate the voices and ideas of everyone in that community. Over the past several years, our team has developed a successful and efficient way to plan with libraries. Instead of strict adherence to a fixed methodology, we work with each client to tailor the planning tools and processes to best fit each library and its community. We focus on creating a strategic plan and offering facility studies that allow the library to adapt and react to today's quickly shifting world and the varied needs of a diverse community.

Regardless of the overall methodology settled upon, our work typically includes the following activities:

- Collection and library data analysis
- Direct input from a broad array of community members and stakeholders (users and non-users), staff, and board members with a focus on aspirational input over problem-focused input.
- Mapped demographic analysis.
- A comparison benchmark report (with multiple comparison cohorts including local, state, national, and aspirational)
- Facilities and space assessments
- Discussion of best practices of future-ready libraries as a part of the stakeholder input process and strategic retreat.
- Review and refinement of library mission, vision, and values.

All findings are synthesized, and goals and strategies are collaboratively developed to guide Leelanau Township Library into the future successfully. The final deliverable provides LTL with a process to keep its strategic plan living, breathing, and updated throughout its lifetime.

This proposal is firm and irrevocable for 90 days. We look forward to the opportunity to respond to questions and further explain our process as needed. Please don't hesitate to contact us with any questions.

Best regards,



Rob Cullin  
Principal

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## Executive Summary

The Leelanau Township Library (LTL) leadership has expressed interest in consulting services to assist with the creation of its next strategic plan. ReThinking Libraries (RTL) is pleased to submit a proposal for partnering with LTL on this important project. It is understood that LTL is embarking on this process to develop a plan to guide decision-making over the next five years. It will define the role of the Library and governance by the Library Board of Trustees and will also serve as a framework for setting the Library's vision, goals, and creating a service plan. The plan will reflect the needs and realities of the Library, align with the overall needs of the Leelanau Township community, and help elevate the role of the Library to a higher level of service.

This is intended to be a highly collaborative process incorporating extensive input from library leadership, library staff, Library Trustees, Friends of the Library, community leaders, and residents. Input will be gathered using a variety of means as determined by the consultant and the Library Strategic Planning Team. It is intended to engage both users and non-users of the Library. We will work with the Library to determine the best approach and balance between in-person and virtual engagement for its community. Every effort will be made to conduct this process in an inclusive manner allowing broad and diverse participation from across all segments of the community.

The RTL team views its role in this project as facilitator and collaborator. We don't make decisions for you; we help you make the best decisions about your Library's present and future. We will analyze information and offer professional recommendations based on observation, stakeholder feedback, demographics, and assessment of Leelanau Township Library's existing services, facilities, and communities. We will also facilitate staff and board strategy planning meetings to help the team find the right strategic vision for your community's Library. RTL will work with the LTL team, prior to the formation of the plan, to benchmark and evaluate library practices, staffing, efficiencies, etc. Once the plan has been created, RTL will also be available to LTL to offer best practices for measuring progress as the plan is implemented.

Of key importance to a project such as this is the quality of the communication and collaboration between RTL and LTL's Strategic Planning Team. As your consultants, we must effectively share analyses and opinions, so all stakeholders can fully understand the implications of decisions that may be made. In turn, the Strategic Planning Team must help RTL fully understand the local context related to any resulting choices. Timely responses in providing requested information and replies will help to keep the project on schedule and all participants fully engaged.

The Strategic Planning Team members will actively participate in the creation of the *Strategic Plan*, so they are fully invested in the process and the final product. It is essential all involved have a clear vision of what needs to be done based on the in-depth assessment of the existing situation, the consideration of new and emerging trends in library services, and an understanding of local realities and sensibilities. Included will be training on processes allowing for the ongoing evaluation of progress toward the established goals and the understanding and confidence to develop new strategies as the plan evolves.

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## Organizational Information: Company/Consultant

Our team is passionate about understanding what it takes to be a successful and thriving future-ready library. As a national library consulting firm working with small rural libraries, large urban libraries, and everything in between, we find our clients are interested in transforming their organizations. We help them engage their communities, envision the possibilities, and evolve to meet their needs for years to come. For over 20 years, the RTL team has been involved in numerous facilities projects, strategic plans, building programs, feasibility studies, community assessments, technology assessments, and other consulting work with hundreds of libraries across the United States.

Most of our time is spent thinking about and working with libraries. In addition to our work with clients, we constantly evaluate library best practices and the impact of emerging macro trends on the library ecosystem. We like to share what we've learned and have been presenting at conferences on overall library trends for nearly fifteen years and on youth space trends for over 20 years. Numerous other consulting and speaking engagements have allowed us to work with and train hundreds of library staff members across the U.S. and abroad.

Rob Cullin and Janet Nelson joined forces to establish ReThinking Libraries (RTL) in 2020 by acquiring Kimberly Bolan & Associates (KBA). KBA was a successful national library consulting company started in 2004 by Rob and his then partner, Kimberly Bolan, MLS (now COO at Allen County Public Library, Fort Wayne, IN). The original company was based outside of Indianapolis, IN but today, Rob is in Fort Collins, CO, and Janet is just outside of Madison, WI.

Our holistic approach helps libraries survive and thrive in an environment of constant change, including shifting demographics, newer and better technologies, increasing real and virtual competition, and often, a somewhat uncertain financial outlook. We also assist libraries with understanding and implementing successful future-ready services and spaces, increasing the efficiency of operations such as circulation and information services, incorporating and managing technology, streamlining behind-the-scenes activities, improving web-based access, and more.

For this project, RTL's team will be led by either Managing Principal, Rob Cullin or Principal/Senior Consultant, Janet Nelson. Both will be actively involved throughout the project. Together Rob and Janet will be responsible for coordinating all onsite and offsite work, managing the project communications and timelines, and coordinating all deliverables. We may partner with other RTL Associates such as Ivonne Smith and Connie Glise, and will include them in the project as needed, but the bulk of the work performed is done by us.

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## Key Staff - Library Experience and Backgrounds

For this project, RTL's team will be led by either Principal/Senior Consultant, Janet Nelson or Managing Principal, Rob Cullin though both will be actively involved. Together Janet and Rob will be responsible for coordination of all onsite and offsite work, managing the project communications and timelines, and coordinating all deliverables. We may partner with other RTL Associates and will include them in the project as needed typically for functions like assisting with community discussion groups (notetaking).

**Rob Cullin's** involvement with KBA began in 2005 when he and Kim co-authored *Technology Made Simple* and began presenting together across the United States. Since then, Rob has been involved in many strategic and facility planning projects. Through his previous work as President and Co-Founder of Evanced Solutions, LLC (later acquired by Demco, Inc.) he was involved with thousands of libraries in the USA, Canada, and Australia. With broad experiences reaching beyond libraries, Rob has direct specialties in strategic planning, community engagement, complex data and demographic analysis, marketing, service, and organizational design. He was a *Library Journal* "Mover & Shaker" in 2008.

**Janet Nelson** has nearly 25 years of experience in the education market, 17 of those years with Demco, Inc. Starting as a Furniture Product Manager, she moved into various strategic roles during her tenure with Demco. Her focus has always been on helping librarians and library staff better serve their communities. Janet began collaborating with Kimberly Bolan on teen library spaces through Demco Library Interiors in 2006 which evolved into more comprehensive projects and shared speaking engagements on library trends. Additional projects at Demco involved engaging with industry partners and library leaders/staff to better understand and create dialog around the immediate and future needs of libraries. She began working with Rob on library consulting in 2019. Her specific areas of expertise include strategic planning, marketing strategy, research and development, and space planning.

### SEE APPENDIX A FOR COMPLETE RESUMES

The RTL team has the capacity to manage this project from the proposal stage through to the final delivery of the plan and is readily available via phone, email, or video conferencing. The team is very adept at managing multiple projects at a time, providing strong communication and quality service to keep things moving and delivering the project on schedule.

ReThinking Libraries staff include the two principals, Rob and Janet, as the sole employees of the organization. We have about 7 additional Associates we often utilize on a freelance basis as notetakers, to help with administrative tasks, and when specialized assistance is needed (language translation, technology assistance, etc.).

## Contacts

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## Our Strategic and Facilities Planning Experience

Strategic and Facility Planning are the two primary services offered by RTL and Rob has led or played a vital role in over 75 public library strategic plans and over 50 facility plans in the past 10 years. Janet has been involved in developing over 30 strategic plans (leading on some) and over 12 facility plans in the nearly five years she has been with the organization. Our services are differentiated by our custom approach, adapted to the needs of each client. The process evolves throughout the course of the project to achieve the best results. Our approach can be very basic for libraries new to strategic planning or quite advanced for those pushing for more cutting-edge approaches to library service.

The team has been involved in various kinds of planning for a multitude of organizations since 1996. Our work has been with libraries, library associations, non-profit organizations, and small and large for-profit businesses. We have been facilitators, analysts, executives, team leaders, and team members in plan development. Since 2014 alone, RTL team members have worked with over 125 different library organizations; conducted over 1,200 community/stakeholder engagement sessions with over 10,000 attendees; and conducted over 110 online surveys with over 40,000 participants. We do not just plan community engagement with our clients, we help them successfully engage community members and staff in the process.

Throughout these experiences, as well as Rob and Janet's previous business experiences, they have worked with a variety of planning methodologies, approaches, and styles. This variety has enabled them to utilize many different approaches in addressing planning for various types of organizations, communities, and organizational cultures.

### ***A sampling of the recent Strategic Plans and Community Assessments facilitated:***

- McDowell County Public Library (NC) – (2023-present) – Strategic Planning
- Warren County Memorial Library (NC) – (2023-present) – Strategic Planning
- Fox River Valley Public Library (IL) – (2023-present) – Strategic Planning
- Troy Public Library (MI) – (2023-present) – Strategic Planning
- Downers Grove Public Library (IL) – (2023) – [Strategic Planning](#)
- Novi Public Library (MI) – (2023) – [Strategic Planning](#)
- Mary Riley Styles Public Library (VA) – (2022-2023) – [Strategic Planning](#)
- Mount Prospect Public Library (IL) – (2021-2022) – [Strategic Planning](#)
- Sun Prairie Public Library (WI) – (2022) – [Strategic Planning](#)
- Sterling Heights Public Library (MI) – (2022) – Strategic Planning
- Pike County Public Library (IN) – (2017 & 2022) – Strategic Planning x 2 and Facility Assessment
- Fulton County Public Library (IN) – (2021 & 2023-present) – Strategic Planning and Facility Planning
- Perry Memorial Library (NC) – (2021-2022) – Strategic Planning
- Charlotte Mecklenburg Library (NC) – (2020-2021) – Facility Master Planning
- Adrian District Library (MI) – (2020-2021) – [Strategic Planning](#) and Facility Planning
- Saline District Library (MI) – (2020-2021) – [Strategic Planning](#)
- Handley Regional Library (VA) – (2019-2020) – Facility Master Planning
- Waverly Public Library (IA) – (2018 and 2020) – [Strategic Planning](#) and Facility Assessment
- Catawba County Library System (NC) – (2019-2020) – [Strategic Planning](#) and Facilities Assessment

For all these clients and the many others not listed here, we worked to determine the approach and methodologies to provide each library with the best results and fit within their allotted budgets.

***Underlined projects above are hyperlinks to sample project reports. Additional samples can be made available upon request.***

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## Our Philosophy and Project Approach

RTL believes that every community is different, which means every library is different. What works in one community may not work in another (even nearby) community. Our approach to library planning and assessment is based on collaboration, open communication, and showing stakeholders “the possibilities” for their library. It is also about identifying what stakeholders and members of the community want and need from their library in terms of services and space. Understanding the community and the Library is at the center of our process.

At a core level, RTL is not married to a single philosophy or methodology of strategic planning. A variety of different approaches and toolsets can help any organization arrive at a solid plan. Throughout our professional work, we have been exposed to and worked with many philosophies, processes, and tools and, if selected, we will work with your team to determine what tools and methodologies best fit your community and your library.

All that being said, RTL does have two overriding philosophies driving our vision for successful and dynamic strategic planning for future-ready libraries:

1. Robust community input from library users, non-users, community leaders, staff, and board members based on aspirational discussions instead of problem-focused dialogue. Though we don't formally call this Appreciative Inquiry, many of the premises and approaches are similar.
2. A final plan that is dynamic and easy to “live.” The plan must maintain a certain level of flexibility, while being measurable, and still address the shifting landscape facing the Library.

Our methodology centers on the previously mentioned philosophies and helps organizations build both a strategic framework and a more strategic-minded culture.

### Two-Tier Planning Approach

Our base and most typical approach, preferred by most clients, is to develop a 2-Tier Plan. The high-level portion of the plan is more general and outlines the focus areas, goals, desired outcomes, and impacts of the plan. It acts as the “strategic lighthouse” for the coming three to five years. This high-level plan is typically two to seven pages long and includes the Library Mission, Vision, and Values along with summarized and more detailed breakdowns of the high-level plan into each focus area. Once this plan is finalized, RTL will work in collaboration with the library leadership and staff to develop a separate annual work plan. The work plan is guided by the high-level plan and focuses on the details and tactics needed to implement the first 12 months of the plan. This is where specific tasks, who is responsible, what is being measured, what success looks like, timelines, budget impacts, etc. are developed. Work plan development for the next 12 months is repeated annually and RTL is available to help, or the Library may proceed on its own, whichever best fits its needs.

A big strength of this process is its inherent design around feedback. As you live the plan, the process helps you constantly evaluate your Library against what is planned and, when necessary, allows for changes and adjustments to be made. No plan can predict the future. The best plan and process accepts this fact and builds evolution into the process, while still maintaining a discipline holding to the higher mission and vision of the Library and the community.

Regardless of the process and tools chosen for your project, RTL's overall goal for strategic planning is to encourage our clients to think and innovate. We are interested in motivating libraries to move to the next level. We want our clients to end up with a concise plan they can live and breathe, not just file with their state agency and/or stick in a drawer. Our role is not to develop the “consultants' plan” or the “staff and board's plan” for LTL. Rather, our responsibility is to help LTL educate its public, generate ideas and solutions, and develop a plan that reflects its community members and the future.

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## Work Plan

ReThinking Libraries takes a holistic view of planning. We incorporate library usage data, local demographic information, multiple forms of community input, and benchmarking data to develop a plan seeking to understand history but focusing on future aspirations and the initiatives and activities needed to achieve the vision. Our expertise in community engagement is a strength and we help libraries maximize community participation during the input phase. Since we work nationally, we are adept at navigating the requirements of different library governance structures and are familiar with the wide variety of funding models characteristic of public libraries. We are well-versed in the trends impacting today's libraries and have practical experience that can be applied to a variety of different situations.

Our processes have been tested over recent years, but we have successfully adapted and are now adept in conducting planning activities in virtual, hybrid, or in-person environments based on health requirements and client desires. We have also had opportunities to dig more deeply into some pressing concerns including diversity, equity and inclusion, homelessness and poverty, sustainability, and other issues that are important to libraries collectively and to specific communities. These new approaches have resulted in more engaged participation by both organizations and individuals and plans that more deeply address some of the core issues making libraries vital to their communities.

As part of a typical strategic planning process, RTL will:

1. **Conduct a kick-off meeting** to establish a timeline, discuss the process, and define initial elements such as LTL Strategic Planning Team introductions, library data requirements, community engagement methods, etc. The timeline will become more detailed as expectations are more clearly defined, and schedules are developed. This step is typically virtual. Depending upon scope, time of year, and library resource availability; plans typically take 4-7 months to complete.
2. **Gather, review, and analyze data and information** gathered and work with the Strategic Planning Team, discussing what it means to be a successful and thriving future-ready library and how that translates to the planning process. The Benchmarks, Demographics, Collection Analysis, and Technology Assessments are all started and often completed during this stage, leaving room for learning along the way to drive adjustments in these assessments and the process. We will need assistance from library staff to gather past reports and complete a couple of information surveys. Rob leads most of our data-gathering efforts.
3. **Gather and analyze stakeholder input** from the community (users and non-users), staff, board members, etc. via community stakeholder discussion sessions, surveys, and intercept activities. Working with the LTL Marketing team is essential in promoting both the community discussion sessions and the surveys through multiple channels.
  - a. Our typical approach for a library of LTL's size involves conducting about 8-12 stakeholder sessions. RTL will work with LTL leadership to develop the right approach to community input and engagement that works best for your Library and community. RTL can offer some sessions in Spanish (executed as bilingual Spanish/English sessions) as an option. Other languages can be accommodated with the support of the Library if needed.
  - b. The format of sessions is generally as follows but will be tailored to your specific needs. These descriptions provide a sense of the scope of community input we want to achieve, if possible.
    - i. Targeted Groups: 7-10 Total (Staff (2-3), Board (1 including Director), and targeted representative members of the public who are personally invited to the sessions).
    - ii. PLUS, at least one Open All-Community Session.
    - iii. The targeted sessions may involve reaching out to specific groups (e.g., parents, seniors, educators, or community leaders) whereas the open forum is more general and available to anyone in the community who is interested in participating.



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- iv. This phase centers around showing people the possibilities for their library and gathering aspirational input. For every client, RTL develops a custom conversation-enabling presentation deck that is targeted and fosters conversations about the client's community.
  - v. RTL staff have had extensive experience conducting bilingual sessions with non-English speaking residents. If these sessions are needed, our team member Ivonne Smith was born in Mexico, is fluent in Spanish, and has helped us conduct such bilingual sessions in the past or we can utilize local resources provided by the Library. We are open to conducting sessions in other languages as well, but we cannot provide a translator from our staff.
  - vi. With RTL you always get at least one of our Principals (Rob or Janet) leading your engagement sessions. There will always be a second RTL associate present taking notes and further supporting the sessions.
- c. RTL can also work with the Strategic Planning Team to develop and conduct a general web-based convenience survey for the public. Our approach is to work with our clients to promote and advertise the survey on a broad level, targeting users and non-users.
- i. RTL does not recommend spending extra library funds to conduct full scientific-level studies. RTL has been involved in projects that made this investment and, in the end, did not get fundamentally better or more useful results than with a convenience survey approach. Our approach uses surveying tools to get a good understanding of the community's view though certainly skewed a bit toward library user perspectives.
  - ii. A paper version of the survey is also provided to the Library (copies supplied by the Library) for distribution to those community members who prefer that format. Typically, library staff or volunteers then enter these completed surveys, but RTL can provide this service for a fee.
  - iii. A Spanish version of the survey, in both paper and online format can be provided and is included as an option in the fee. If additional versions are needed in other languages, they can also be provided for an additional fee.
  - iv. Janet leads all our survey work in-house, including design, launch support, and analysis.
4. **Execute the Community Facility Needs Assessment (Optional):** At this stage RTL will also utilize all of the data, community input, additional space needs analysis, and other facility assessments to complete a Community Facility Needs Analysis. This report will assess the needs of additional library physical space(s). Deliverables will include:
- A building assessment of existing location and high-level assessments for additional new location possibilities
  - An overall set of recommendations for current and future facilities
5. **Develop and deliver the "Findings Book"** from the data and research gathered and have it distributed to participants about 1 week before the Strategic Retreat. This book includes the information gathered and analyzed during the process. Summaries and key takeaways, in addition to full data sets, are included or linked from the book. Typically, this PDF document ranges from 80 to 180 pages. The size is largely driven by the number of surveys completed and the feedback gathered at the engagement sessions. The RTL team will collaborate to compile this findings book.
6. **Facilitate a Strategic Planning Retreat** to define the plan. This is typically a 6- to 7-hour long strategy session with 15 to 25 people including, but not limited to, staff (both supervisory and non-supervisory), board members, community leaders, and general community members. During the *Retreat*, we will distill the input gathered (concentrated in the Findings Book) and discuss it, along with best practices for future-ready public libraries. Through a series of small group and larger group exercises, the session will work to surface top issues and strategic opportunities, ultimately leading to the final plan. LTL's current mission, vision, and values will be reviewed and refined or
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developed to relate to the key strategies. Through the retreat process, RTL continues incorporating an aspirational approach to the planning process. The group will work to discover:

- LTL's identity (What is LTL now? What does LTL want to be?)
- The key ingredients and focus of LTL strategies.
- LTL's Mission, Vision, and Core Values

Both Rob and Janet will be present at the retreat and may bring additional team members along as deemed necessary or beneficial to the client and in the best interests of the process.

7. **Develop a high-level 2-7-page *Strategic Plan*.** This is the initial deliverable directly resulting from the *Retreat*. This document is the "Strategic Lighthouse" that library leadership and staff can live, breathe, and easily refer to on a day-to-day basis. RTL can present this plan to the Board and/or community at the appropriate time if desired.
8. **Assist the Library Planning Team with the creation of a detailed *Work Plan*.** This document is developed for a 12-month timeframe each year and focuses on the details behind the 2-7-page plan (action steps, tactics, milestones, resources, budget/funding, etc.). It is developed primarily by library leadership and staff with kickoff and ongoing assistance from RTL based on what the library team feels they need, but the approach can be modified if needed.
9. **Follow Up.** RTL is available to the Library for additional follow-up and advice on issues connected with the strategic plan or its implementation, or anything related to library operations that RTL can reasonably support. We are also available to support subsequent Annual Work Plan development as the library feels is needed.

Our process develops a long-term vision and identifies the areas where efforts are needed to achieve those goals. The annual work plan details the specifics to achieve progress toward the goals and is evaluated and adjusted regularly. Since it is nearly impossible to predict the future three years in advance, we have found the annual work plan to be much more productive to guide the library at the detailed task level.

Since the services we offer tend to be bespoke and tailored to the needs of each client, we allow our clients to determine if there are areas where they have staff expertise that may enhance the process. We work very collaboratively, and our experience has shown that the involvement of library leadership, staff, Board, Friends, and the community encourages ownership and creates a plan that is better understood and more easily acted upon.

## Deliverables

### RTL's deliverables will/can include:

- A detailed community analysis including demographics and mapping of key social indicators/measurements.
  - Organizational and community assessments.
  - A multi-cohort comparison benchmark analysis of primary library metrics: local, state, national, and aspirational cohort groups.
  - Collection utilization analysis (turnover and relative use).
  - Facility Analysis and Space Needs Assessments
  - Compiled notes from stakeholder sessions, online survey, etc., which will include key priorities and goals emerging from these inputs and summaries where appropriate.
  - Outputs from Strategic Retreat include analysis, ideation, and voting exercises.
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- A 2-7-page high-level *Strategic Plan* focusing on the top 4-6 priority focus areas defined at the retreat and refined mission, vision, and values.
- Assistance with the development of a detailed *Work Plan* specifically addressing the details necessary for successfully executing the plan, including actions, timeline, resources, budget, etc. Most of the work here is done by the library staff but with the assistance and guidance of RTL.

**See Appendix B or click the hyperlinks in the previous sample list of clients for plan examples.**

## Timeline Estimates

The following outlines a possible approach to timing that RTL can currently support. We will work with LTL to determine the best approach and develop a timeline that meets the timing needs and balances the best results in terms of community engagement, activities, and deadlines. We generally recommend doing community engagement from September through November or mid-January through May for the best results but will discuss what is best for your Library. Staff and board sessions can occur during any time of the year that aligns with schedules.

### Sample Timeline

- |                         |  |
|-------------------------|--|
| • May 2024              | Kickoff  |
| • May-July 2024         | Data Gathering and Analysis  |
| • May/June 2024         | Community Engagement/Stakeholder Planning and Promotion  |
| • June/July 2024        | Internal Stakeholder Engagement Sessions (Virtual or Onsite)   |
| • June 2024             | Survey Launch  |
| • June/July 2024        | Community Engagement/Stakeholder Sessions(onsite plus virtual)   |
| • September 2024        | Synthesis: Delivery of Findings Book, and Strategic Retreat  |
| • October/November 2024 | High-level Plan Development & Delivery to Library –<br>within 3-4 weeks following the retreat  |
| • November 2024         | Final Plan Delivered to the Library Director and Approved  |
| • December 2024         | 1-Year Detailed Work Plan Development – Training, Support, and Assistance delivered following the Retreat with ongoing support and assistance until the 1-year plan is complete. |
| • Annually              | Ongoing Support/Assistance as needed with developing subsequent 1-year Work Plans  |

## Subcontractors

All work will be performed by Rethinking Libraries personnel and not subcontracted.

## Cost Estimate:

### Time and Material Option:

For this project, we are offering LTL a **discounted rate** of:

- \$150/hour for Principals (Rob and Janet) (Normally \$170/hour)
- \$120/hour for Translation/Multi-lingual Facilitation (Ivonne) (Normally \$140/hour)
- \$100/hour for Assistants or Notetakers (Connie or other Associate) (Normally \$120/hour)

Work Area / Deliverable	Typical Costs
<b>Overall Project Management / Virtual Kickoff Meeting/ (Required)</b>	\$2,700
<b>Data Gathering and Analysis: Demographics, Multi-cohort benchmark analysis, Collection turnover analysis (Required)</b>	\$4,200
<b>Staff and Community Focus Group Facilitation (Required but adjustable)</b>	\$3,900 to \$5,400 depending on how the number and structure of the engagement sessions (higher end would include multi-lingual sessions)
<b>Online Survey Design, Deployment, and Analysis (Recommended)</b>	\$4,200 to \$5,250 for English version (online and print) +\$750 additional language translation online only OR, +\$1,200 both print and online
<b>Community Facility Needs Assessment (Optional)</b>	\$5,000
<b>Strategic Retreat, includes all prep, data packet compilation, and virtual or onsite time (Required)</b>	\$5,250 ideally done onsite during a single 1-to-2-day visit.
<b>3-5 Year High-Level Plan Development (Recommended)</b>	\$1,650 includes a virtual presentation to the board/leadership \$500 added for onsite delivery and review
<b>12-Month Work Plan Development Assistance (Recommended)</b>	\$600 to \$1,650
<b>Total Likely Range depending on options: (required and recommended elements only)</b>	\$22,500 to \$26,100 plus expenses
<b>Expected Expenses:</b> All travel is at cost.  Any supplies or photocopying would be billed at cost, but those needs would be minimal.	\$2,400 to \$3,000 total expected range for 2 onsite trips (1 for community engagement sessions and 1 for the retreat) more onsite visits are possible.

## OR...

### Fixed Fee Option:

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This option gives LTL more predictable costs, but less flexibility in terms of scope of activities. It is limited to the following scope and onsite visits:

- 1 kick-off meeting and data gathering (via Zoom virtual meeting)
- Online survey development, hosting, and management provided by RTL but with promotion and advertising driven by the Library, printable version provided by RTL but printed and distributed by the Library (web and print in English version only)
- Data Analysis Options: general demographics and mapping, multi-cohort comparison benchmarks, collection utilization analysis by collection segment/genre
- 3-day onsite visit for stakeholder sessions
  - Stakeholder sessions are capped at 10 sessions total (no more than 4 in any one day and over no more than 3 days, required to be consecutive). Staff sessions and sometimes board sessions are done virtually but at the client's discretion. All sessions are in English only.
- 1 full day onsite for *Stakeholder Retreat (~7hrs)*
  - *With one optional pre-retreat findings review virtual meeting (1 hour)*
- RTL primary driver of Strategic Plan with library leadership in support
- Virtual *Strategic Plan* presentation to the board
- Virtual *Work Plan* kick-off meeting with staff
- Library Staff primary execution of Work Plan development with RTL in close support
- All other meetings and work are to be completed remotely or via web/video conference, unless RTL, at their discretion, chooses to be onsite.

**Costs: \$24,450 + expenses capped at \$2,800 (161 hours) (doesn't include the facility related services)**

IF LTL would like a fixed fee option for this project but with a different scope, options (e.g., including the facility assessments), or approach we'd be happy to work on a mutually agreeable scope of services and provide a fixed fee option for that as well.

### Billing Approach:

- For Time and Material Option billing is done monthly as incurred. Detailed invoices are provided with all expended time and incurred expenses listed with receipts.
  - For the fixed price option, billing is handled in four phases.
    - Phase 1: 25% -- Billed after initial kickoff meeting.
    - Phase 2: 25% -- Billed after start of stakeholder engagement sessions and/or survey.
    - Phase 3: 25% -- Billed after the strategic retreat.
    - Phase 4: 25% -- Billed after the delivery of the High-Level Plan to the Library
  - For both options, these expenses will be billed monthly as they occur.
    - Travel expenses will be billed at cost.
    - Any other miscellaneous (printing, shipping, etc.) expenses will be billed at cost but will be minimal.
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## References

**Julie Farkas**, Director

Novi Public Library

45255 W. 10 Mile Rd Novi, MI 48375

248-349-0720      jfarkas@novilibrary.org

**Project:** NPL's strategic planning was initiated in October 2022 and concluded in July 2023. This project included a very well-received survey as well as great attendance at the engagement sessions. This is a very important institution to the community and is located next to the Novi High School promoting strong after-school activity. The plan included a significant focus on aligning community expectations, staff resources, and budget.

**Eric Smith**, Director

Mason County District Library

2017 E. Ludington Avenue, Ludington, MI 49431

231-843-8465      esmith@mcdlibrary.org

**Project:** This initiative began in November 2021 and was completed in July 2022 and included the facilitation of a 5-year Strategic Plan. Significant focus was placed on organizational structure and policy development. Engagement included all standard services and an in-person staff workshop.

**Jennifer Wrzesinski**, Director

Adrian District Library

143 E. Maumee Street, Adrian, MI

517-265-2265      jwrzesinski@adrian.lib.mi.us

**Project:** Running from September 2020 - April 2021, this Strategic Planning project was conducted completely virtually due to COVID-19. It included data gathering and analysis, community sessions, survey, and retreat. As a result of the plan, a second initiative took place to develop a phased Facility Plan that will better utilize the space within their building.

**We encourage you to speak to any of our clients or references or you may refer to RTL's website at [www.rethinkinglibraries.org](http://www.rethinkinglibraries.org) for additional information. Sample High-level Project Plans can be found in Appendix B.**

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**APPENDIX A:**  
**Resumes**

**ROBERT CULLIN**

Email: rob@rethinkinglibraries.org

**ReThinking Libraries****2004 – present (2004 -2019 dba as Kimberly Bolan and Associates, LLC)***Managing Principal / Library Evolutionist*

Prior to starting ReThinking Libraries, LLC with Janet Nelson, Rob helped establish Kimberly Bolan & Associates in November 2004. His consulting work kicked off when he co-authored *Technology Made Simple* with Kim Bolan and began writing and presenting together with her across the USA. Rob has been involved in all of RTL's strategic plans and most of the strategic planning work completed by KBA. He has also completed a number of facilities projects under both organizations. Through his work as the Co-Founder of Evanced Solutions LLC and later at Demco, Inc., he has been involved with thousands of libraries around the world. With a broad set of experiences reaching even beyond libraries, Rob has direct specialties in community engagement, strategic planning, library facility assessment and planning, AMH systems, data, demographic analysis, and organizational design.

**Relevant Project Experience:**

Novi Public Library (MI) – Strategic Planning (2023)  
 Downers Grove Public Library (IL) – Strategic Planning (2023)  
 Cecil County Public Library (MD) – Strategic Planning (2023)  
 Glencoe Public Library (IL) – Strategic Planning (2023)  
 Troy Public Library (MI) – Strategic Planning (2023-ongoing)  
 Mary Riley Styles Public Library (VA) – Strategic Planning (2022-2023), Facility Planning (2017-2019)  
 Mount Prospect Public Library (IL) – Strategic Planning (2021-2022)  
 Jennings County Library (IN) – Ongoing work: Planning & Design, Strategic Plans, Org. Develop. (2014-2023)  
 Tuscaloosa Public Library (AL) –Ongoing work: Strategic and Facilities Planning, Feasibility Study (2021-Present)  
 Newburgh-Chandler Public Library (IN) – Strategic Planning (2021-2022)  
 Saratoga Springs Public Library (NY) – Strategic Planning (2020-2021)  
 West Haven Library (CT) –Strategic Planning and Efficiency Study (2020-2021)  
 Adrian District Library (MI) – Strategic Planning and Facility Planning (2020-2021)  
 Saline District Library (MI) – Strategic Planning (2019-2020)  
 Catawba County Public Library (NC) – Strategic and Facilities Planning (2019-2020)  
 Redford Township District Library (MI) – Strategic Planning (2018)  
 Free Library of Philadelphia (PA) – POE Study (2018-2019)  
 Allen County Public Library (IN) – Facility Programming, Planning & Design, Strategic Planning (2017-2018)

**ADDITIONAL EXPERIENCE:****Evanced Solutions, LLC, Indianapolis, Indiana****2002 – 2014***President and Co-Founder***As part of Demco, Inc. Madison, Wisconsin****2011 – 2014***Vice President***PUBLICATIONS:***Technology Made Simple*, Chicago: ALA, 2007."Web, Library, and Teen Services 2.0," *Young Adult Library Services*, Winter 2007."Technology Planning: The Big Picture for Small Libraries," *WebJunction* (November 20, 2006).**HONORS AND AWARDS:**

2008 Library Journal's Movers and Shakers Award

**EDUCATION:**

Purdue University, West Lafayette, IN and Indianapolis, IN, B.S. Electrical Engineering Technology  
 GE Six Sigma – Green Belt Certified



**JANET NELSON**

Email : janet@rethinkinglibraries.org

**ReThinking Libraries****2019 – present (initially dba Kimberly Bolan and Associates)***Principal and Senior Consultant*

Janet co-founded ReThinking Libraries, LLC with Rob Cullin in 2020. Prior to that, her career in the library industry began in 1999 as a Furniture Product Manager with Demco, Inc. During her time there, she worked in a variety of roles but always with a focus on providing libraries across the US with the products and services to best serve their communities. She was part of the team that envisioned and developed a service offering, known today as Demco Interiors. Janet began collaborating with Kimberly Bolan & Associates, LLC on design projects in 2006, starting with teen spaces. The collaboration evolved into more comprehensive library projects, speaking engagements, and co-authoring articles on library trends.

In addition to her furniture/project experience, Janet has been involved in market research, strategic planning, and customer engagement, all focused on more thoroughly understanding and serving library needs. While at Demco she facilitated a "What's Next?" Forum, bringing together visionary library leaders and launched the online *Ideas & Inspiration* platform to share library ideas. With a broad set of experiences reaching even beyond libraries, Janet has direct specialties in strategic planning, marketing, research and development, and space planning.

**Relevant Project Experience:**

- Cromaine Library (MI) – Strategic Planning (2023)
- Novi Public Library (MI) – Strategic Planning (2023)
- Downers Grove Public Library (IL) – Strategic Planning (2023)
- Cecil County Public Library (MD) – Strategic Planning (2023)
- Glencoe Public Library (IL) – Strategic Planning (2023)
- Mary Riley Styles Public Library (VA) – Strategic Planning (2022-2023)
- Mount Prospect Public Library (IL) – Strategic Planning (2021-2022)
- Sun Prairie Public Library (WI) – Strategic Planning (2022)
- Tuscaloosa Public Library (AL) –Ongoing work: Strategic and Facilities Planning, Feasibility Study (2021-Present)
- Durham Public Library (CT) – Strategic Planning (2022)
- Jennings County Public Library (IN) -- Strategic Planning (2022-2023)
- Fulton County Public Library (IN) – Strategic Planning (2021-2022)
- Newburgh-Chandler Public Library (IN) – Strategic Planning (2021-2022)
- Saratoga Springs Public Library (NY) – Strategic Planning (2020-2021)
- West Haven Library (CT) –Strategic Planning and Efficiency Study (2020-2021)
- Adrian District Library (MI) – Strategic Planning and Facility Planning (2020-2022)
- Saline District Library (MI) – Strategic Planning (2019-2021)
- Catawba County Public Library (NC) – Strategic and Facilities Planning (2019-2020)

**ADDITIONAL EXPERIENCE:****Demco, Inc., Madison, WI****1999 – 2016***Director, Library Engagement and Solutions*

- Collaborated on a content strategy that included the creation of the *Ideas + Inspiration* website, webinars, and relevant information and articles.
- Developed *What's Next?* a customer forum of influential public librarians, to explore future library needs.
- Co-led start-up of Demco Interiors from feasibility studies to a fully operational business unit

**PUBLICATIONS:**

- "Just for Them", *Library Journal's Library by Design*, May 2010.
- Demco Ideas & Inspiration Blog Posts and Webinars, 2012 – 2016
- Demco Interiors Blog, 2012 – 2016

**EDUCATION:**

- University of Wisconsin-Stout, Menomonie, WI, M.S. Home Economics: Clothing (Design & Manufacturing)
- University of Wisconsin-Stevens Point, Stevens Point, WI, B.A. Fashion Merchandising