



# Request for Proposals

for Strategic Planning Consulting Services  
for the Midwest Collaborative for Library Services  
(MCLS)

Date Issued: **April 12, 2023**

Proposals Due: **May 31, 2023, 5pm Eastern**

Email Proposal to: **Scott Garrison**  
Executive Director  
garrisons@mcls.org

Inquiries to: **Scott Garrison**  
(accepted by phone Executive Director  
through May 17) (517) 489-4071

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## **Introduction and Organizational Background**

The [Midwest Collaborative for Library Services](#) (MCLS) is a non-profit multitype library consortium that serves approximately 650 member libraries of all sizes and types (including academic, public, research, school, special, and state libraries) throughout Indiana and Michigan. MCLS has a 16-member Board of Directors (eight from each state) representing each type, that uses the Policy Governance system. We currently have 25 total staff dispersed throughout Indiana and Michigan who work mostly from home, and a main office in Lansing, MI. Our annual operating budget is approximately \$3M, which we generate each year through the services we provide. We have reserve funds of approximately \$9M, and opportunities to invest some of those funds strategically for existing and new services to libraries.

The primary services we provide include:

1. **Consulting** (strategic planning, meeting facilitation, and more)
2. **Contracted Infrastructure** (e.g., for association management, fiscal agency, and technology services to individual libraries and groups of libraries)
3. **Engagement** (helping libraries engage with their communities effectively)
4. **Group Purchasing** (working with groups of libraries to obtain eResource subscription and other product discounts)
5. **Shared Library Systems** (implementing, supporting, and offering training for the Michigan eLibrary's MeLCat and MeL eResources, and the RIDES statewide delivery service in Michigan)
6. **Training** (on cataloging, staff development, and other topics)

Features that distinguish us as a library consortium include:

1. **Knowledgeable staff** with an adaptive, responsive, growth-oriented, entrepreneurial mindset
2. **Deep expertise in consulting**, especially around strategic planning, community engagement, and meeting facilitation
3. **Deep expertise in resource sharing and statewide catalog hosting, support, training, and engagement**
4. **Very affordable membership rates** (especially compared to other consortia and library associations)
5. **Infrastructure** to help libraries do things individually and together that they might not be able to do without it
6. **We value and prioritize relationships** with and between libraries (MCLS and libraries, groups of libraries, other consortia, etc.)
7. **Wide reach across hundreds of libraries in two states** (and beyond – we also serve customer libraries outside IN and MI)
8. **Relationships with ~70 vendors** and discounts on their products

## **Scope of Work**

We seek a consultant to guide us in preparing and implementing a strengths-based strategic planning process that:

1. Identifies and engages appropriate stakeholders (e.g., members, non-members, Board, management team, and staff)
2. Supports our management team and staff in establishing:
  - a. shared values, vision and other needed language
  - b. desired elements of organizational culture for the future, e.g.,
    - i. staff connectedness
    - ii. effective and timely communication
3. Includes an environmental scan
4. Continues from existing work and initial data gathering including:
  - a. our Board's overall vision (i.e., Policy Governance Ends statement)
  - b. Harwood Institute-inspired Community Conversations we conducted with libraries and affiliated associations throughout Indiana and Michigan in early 2023 to learn about their aspirations and concerns and inform us about how to serve libraries more fully
5. Helps us identify and establish appropriate metrics, key performance indicators, stories, and other quantitative and qualitative data our Executive Director and staff can use to operationalize our Board's vision and make decisions, and that the Board can use to further refine that vision and monitor organizational performance in their governance context
6. Helps us create strategic focus areas for the organization that identify:
  - a. relationships to build and leverage
  - b. opportunities to lead and/or collaborate
  - c. opportunities to innovate
  - d. opportunities to grow existing services and/or build new services
  - e. opportunities to prioritize, rethink, change, and/or sunset existing work
  - f. ways to sustain and increase membership and member engagement
  - g. opportunities to invest reserve funds toward all of the above
7. Results in the most flexible plan possible that accounts for the rapid pace and large scale of change libraries and the consortia who serve them are experiencing

This consulting engagement will culminate in a strategic plan document that will guide how we plan, budget, and operate for the next several years.

An ideal consultant would:

1. Acknowledge and consider our own Appreciative Inquiry-based (AI) approach to strategic planning that we use with libraries (experience with AI is not required)
2. Acknowledge and consider our Board's Policy Governance system of setting vision, monitoring organizational performance, and more (experience with Policy Governance is not required)
3. Acknowledge and consider issues of diversity, equity, inclusion, social justice, and accessibility (DEIJA) that impact libraries and the consortia that serve them (sensitivity to DEIJA issues is required)
4. Have previous experience working with non-profit organizations

5. Understand the opportunities and challenges unique to member-driven non-profit-organizations

### **Final Deliverables**

We seek actionable data and information from this process that will help guide future planning, decision-making, and operations at MCLS, including but not limited to:

1. Reports from environmental scan, stakeholder engagement, etc.
2. Cultural artifacts created during the process (e.g., updated vision, mission, management and staff shared values, notes, and other documents)
3. Quantitative and qualitative data
4. Recommended key performance indicators, metrics, and other data points/measures
5. A flexible strategic plan that includes as much stakeholder input as possible and incorporates the information we feed into and collect during the process

### **Proposal Content Requirements**

1. Cover letter with lead contact information (two pages maximum)
2. An executive summary (one page maximum)
3. Consulting firm qualifications
4. Key personnel who will be involved in the process, and their experience and expertise
5. A work plan that includes a description of the methodology, tasks, timeline, and estimated amount of time the project will require
  - a. Timeline should include communication and “check-in” points with the organization, and expected duration of each project task
6. What work is outside the scope of the consultant/this project
7. List of consultant and organization responsibilities for the project
  - a. E.g. deliverables, timelines, etc.
8. Any exclusions or exceptions
9. Complete schedule of costs (including consulting, supplies, travel, etc.)
10. Cost for any needed additional consulting time
11. Statement of any experience working with organizations seeking to conduct/support/foster diversity, equity, inclusion, social justice, and/or accessibility initiatives
12. A list of references (3 references minimum)
13. Examples of other strategic planning consulting work (2 examples minimum)
14. Availability for a presentation to the MCLS management team on June 28-29, 2023

### **Proposal Evaluation Process and Timeline**

We will evaluate proposals based on the following criteria:

1. Cost
2. Experience
3. Thoroughness and attention to our requirements and other sections above
4. Availability for our project
5. Quality of presentation to the MCLS management team

**Desired Timeline**

We wish to begin work on a mutually agreed-upon start date, as soon as July 2023, depending on chosen consultant and MCLS staff availability. We will negotiate a project timeline based on consultant availability and proposal.