

**Urbandale Public Library  
Request for Proposal  
Strategic Planning**

**Complete List of Questions and Answers**

Below is a summary of questions the Urbandale Public Library has received regarding our Request for Proposals (RFP) for our upcoming strategic plan. The following questions were received between April 6<sup>th</sup> and April 23<sup>rd</sup>, 2021.

Has a budget for this initiative been approved? If so, what is your anticipated budget or budget range?

The Urbandale Library Board of Trustees has budgeted up to \$25,000 for a strategic planning consultant.

What is the impetus driving the need for external support at the current time?

The Urbandale Public Library creates five-year strategic plans. We are looking for an experienced strategic planning consultant to help us craft our next strategic plan for 2022 – 2026.

Is there an incumbent supporting this effort at the present time? If so, who is the incumbent?

We do not have any incumbent strategic planning consultants helping us at this time.

If there is not an incumbent, have you received any strategic planning support from an external source in previous years, or are you receiving any support at the present time?

Our previous strategic planning consultant came from the State Library of Iowa and last assisted us in 2015.

How many stakeholders do you anticipate being involved in the planning process, including public input sessions?

We have no pre-determined requirement for the number of stakeholders in the planning process. We are seeking input from community leaders, local residents, nonprofits, educators, and business leaders to ensure the plan is inclusive and comprehensive.

Given the impact of the pandemic on travel as well as public health risks, what is the expectation regarding face-to-face meetings or can you remain flexible regarding conducting meetings, public sessions, etc. using video conferencing virtually?

The Urbandale Public Library is following guidance from the City of Urbandale and from the State of Iowa. Currently, the Board of Trustees is planning on meeting in-person for the remainder of the year. Our preference is for in-person, face-to-face meetings. However, given the unpredictability surrounding

COVID, we recognize that we may need to allow for flexibility. We will continue to follow guidance from the City of Urbandale and State of Iowa and adjust accordingly.

Is this a fixed price solicitation?

The Urbandale Library Board of Trustees has budgeted up to \$25,000 for a strategic planning consultant. The consultant will be chosen through a competitive bid process. There is no budget for overage.

Is there an estimated award time range?

The Urbandale Public Library Board of Trustees will be reviewing proposals during their May 2021 meeting. Finalists may be invited to participate in an in-person or virtual interview with the Board of Trustees. A selection will be made before our next regular meeting in June 2021. Our strategic planning process begins at our June meeting of the Board of Trustees.

What is the anticipated timeframe for the project completion?

Our strategic planning process begins at our June 2021 Board of Trustees meeting. The final strategic plan will be presented to the Board of Trustees during our November 2021 meeting.

Will a survey be part of the public input process?

A survey can certainly be part of the public input process. We expect a strategic plan that reflects feedback and data-gathering from external stakeholders to help us meet the needs of our community.

Who will be responsible for promoting the public input sessions?

The library is able to assist in the promotion of the public input sessions to existing library users through our normal communication channels (for example, Facebook, Twitter, email newsletters, and posters).

Will definition of objectives and activities be part of the planning process similar to those in the 2016 – 2021 plan?

The Urbandale Public Library seeks clearly defined priorities, goals, and objectives that are measurable and for which the library will hold itself accountable. The definition of objectives and activities (similar to those in the 2016-2021 plan) can be part of the strategic planning process if it is helpful to create clearly defined priorities, goals, and objectives.

To what extent to will the management team and Board be involved in the development of the plan?

The firm or consultant(s) will lead the strategic planning process for the Board of Trustees and staff. The Board of Trustees and library staff are able to supply information and knowledge regarding the library's operations. The selected firm or consultant(s) should lead the process of creating the deliverables as identified in the "Scope of Work" section of our RFP.

Should a strategic assessment of the UPL team/organization be conducted to gage the UPL's planning & execution readiness?

A strategic assessment of the Urbandale Public Library team/organization can certainly be conducted as part of the strategic planning process.

Do you have a budget figure or range in mind for the project?

The Urbandale Library Board of Trustees has budgeted up to \$25,000 for strategic planning. The consultant will be selected through a competitive bid process.

Has the internal strategic planning team been selected for this project? If not, by contract award? How large is the team?

The individuals and the size for the "strategic planning team" have not yet been finalized. However, the strategic planning team will be identified and ready to go upon date of contract effectiveness.

Can the UPL provide a list of the internal and external stakeholders including community leaders and business leaders – with name, phone number and/or email address?

We will not be sharing the names or contact information of internal and external stakeholders at this time.

Do you have a date for the November 2021 Library Board of Trustees meeting? How much time should we allocate for the presentation?

The Urbandale Library Board of Trustees meets every 4th Monday of the month at 5:30 p.m. The date for the November 2021 Board of Trustees meeting is November 22nd, 2021. There is no specific time requirement for the presentation. The presentation should adequately describe the new strategic plan for 2022-2026.

Do you have a budget allocation for the Strategic Planning initiative?

The Urbandale Library Board of Trustees has budgeted up to \$25,000 for strategic planning.

It looks like the 2016-2021 Strategic Plan used a Community Committee rather than a public input effort to gain insight and inform the plan. Confirming a public input strategy is desired this time?

We are seeking information from internal and external stakeholders through public input sessions. If a community committee is helpful to gather information, it can certainly be a part of this process.

Is the Library considering working with the Iowa State Library's Central District Consultant for this round of planning?

The Urbandale Library is not considering working with the State Library of Iowa's Central District Consultant for this round of strategic planning.

Is there a budget set for the project and, if so, is it possible to share the number?

The Urbandale Library Board of Trustees has budgeted up to \$25,000 for strategic planning. The consultant will be selected through a competitive bid process.

Does the Library still use CollectionHQ? Any other data platform such as OrangeBoy or Patron Point?

The library does not currently use CollectionHQ. We currently use Patron Point.

Do the FY19 numbers reflect current operations, e.g. you still have more registered users than the total population of the city?"

The Urbandale Library does have more registered users than the total population of our city. The Urbandale Library attracts many users from Urbandale and the surrounding Des Moines metro area.

Do the non-residents have the same access to UPL as residents?

Non-residents have almost all the same borrowing privileges as residents. The only services that are unavailable to nonresidents are our Hoopa collection, Overdrive collection, and Adventure Pass program.

Do the non-residents pay for their UPL card, and/or does UPL receive state aide that is, at least in part, conditioned by the number of no-residents users?

An Urbandale Public Library card is free for the following types of individuals:

- 1.) Residents of Urbandale
- 2.) Nonresidents who own real estate in Urbandale and provide proof of ownership
- 3.) Residents of contracting entities
- 4.) Residents of communities participating in the State Library of Iowa's Open Access Program

Cont.

The Urbandale Library receives funding from the State of Iowa to participate in the State Library of Iowa's Open Access Program (which provides funding to libraries that provide cards and services to non-residents). You can learn more about Iowa's Open Access program here:

<https://www.statelibraryofiowa.org/ld/e/enrich-ia/open-access>

If an individual does not meet any of the above requirements, a subscription card may be purchased for a nonrefundable fee of \$25.

Would the following be considered "data gathering: "Focus Groups, Stakeholder Interviews, Meetings with Library Trustees?"

Our intent is to consider focus groups and stakeholder interviews as part of the data gathering process. Most meetings with the Library Trustees will not be considered as data gathering.

Would preparing summaries of each Focus Group, Interview, Meeting be considered "analysis?"

Yes, preparing summaries of the results from the focus groups and interviews would be considered analysis.

Would an online survey, or a paper survey, be considered "data gathering?"

Yes, an online survey or paper survey would be considered as data gathering.

Would a summary of the survey(s) be considered "analysis?"

Yes, a summary of the survey would be considered analysis.

Re Library's primary meeting room: what is the seating capacity:

In our large meeting room, the maximum capacity is 82 people with a combination of tables and chairs. Or we can accommodate a maximum of 176 people with chairs only.

"Is it flat floor or tiered;"

Our large meeting room consists of a single, flat floor.

"Can a ZOOM meeting, as an example, originate there and/or receive sound and video from a remote site?"

Our large meeting room has a digital projector, sound system, wireless internet, and laptops with cameras.

Re the Board of Trustees, are they appointed by the City Council, elected, or ???

The Board of Trustees consists of seven Trustees, appointed by the Mayor and approved by the City Council.

And, what is the length of their terms and can they serve more than one term?

Appointments to the Board of Trustees are for periods of six years, except to fill vacancies. Trustees may serve more than one term.

As for the Foundation, how is that Board selected?

The Foundation consists of nine members. Four of the members are presently serving on the Board of Trustees. The remaining five are at-large members are elected by majority vote of the Board of Directors of the Urbandale Public Library Foundation.

Is there a campaign underway now?"

The Foundation conducts an annual campaign. It largely consists of a mass-mailing appeal for donations. Annual campaigns typically begin in November and have usually ended by the following February.

Does one "join" the Foundation and the membership fee is a primary funding source?"

Individuals do not "join" the Foundation. The only "members" consist of the nine Board of Directors. There is no membership fee to be part of the Board of Directors.

What is your timeframe for this planning to be done?

Here is our Tentative Planning Process Timeline: June 2021: Strategic planning process begins. November 2021: Final plan presented to the Board of Trustees.

What is your budget for this project?

The Urbandale Library Board of Trustees has budgeted up to \$25,000 for strategic planning.

For leaders involved in the last strategic planning process - were there any short comings or less than optimal strategic planning process activities that we might want to avoid with the upcoming planning cycle?

In our last strategic planning process, we found a variety of strategic planning exercises and activities to be beneficial. No activities were found to be deficient or less-than-optimal.

How different are your thoughts on the future five-year vision for the Library v. the current Library operations?

We are proud of the work we have done as part of our current strategic plan. COVID has presented us with challenges as well as opportunities. We are excited to identify objectives to build on our success and expand services to our community.

Can you share the Library's management team positions titles (management planning team) to be included in the planning processes so we can customize our strategic planning methodologies to fit the size and uniqueness of your organization/team?

The individuals and the size for the strategic planning team have not yet been finalized. However, the strategic planning team will be identified and ready to go upon date of contract effectiveness. A list of our key library personnel can be found on our website: <https://www.urbandalelibrary.org/staff-directory/>

Has a budget been allocated for this work? If so, are you able to share the range/figure?

The Urbandale Library Board of Trustees has budgeted up to \$25,000 for strategic planning.

The RFP document contained a link to your current strategic plan (ending 2021). Have you been monitoring progress towards the objectives? If so, will the results be shared with your selected vendor?

Yes, we have been monitoring our progress toward the objectives in our current strategic plan. We would share these objectives and our progress with the selected vendor.

The RFP document notes that the selected vendor will work with the "strategic planning team." Have the individuals for this team already been identified and will the team be ready to go upon date of contract effectiveness?

The individuals for the "strategic planning team" have not yet been identified. However, the strategic planning team will be identified and ready to go upon date of contract effectiveness.

Is there a desired timeline within which you would like to complete the activities noted in the RFP? We understand that the final plan has to be presented to the Board in November 2021 but wanted to double-check to see if there was any driver/desire to accelerate.

There is no driver/desire to accelerate the timeline as outlined in the RFP. The strategic planning process would begin in June of 2021 and the final plan would be presented to the Board of Trustees in November of 2021.

Have weights been assigned for the proposal selection criteria? For example, if a vendor does not have a public library reference, would this be a significant detriment?

The grading criteria for the selection of a strategic planning consultant has not yet been finalized. Proposals will be evaluated by the criteria established in the RFP document. Experience in library operations, service, trends, and functions is a preferred qualification, not a requirement.

Your website indicates there is a Foundation. It does not list a Friends of the Library. There is no FOL?

The Urbandale Library does not have a Friends of the Library group. We only have a Board of Trustees (which governs the library) and our Urbandale Public Library Foundation (which receives donations from the public).