

Request for Proposal Strategic Planning Facilitation



2/8/2026

SECTION I: INTRODUCTION

The Ypsilanti District Library (YDL) is seeking consultant services to assist the Board, staff, and community in developing a comprehensive strategic plan. The plan will include goals, measurable objectives, and proposed activities to meet community needs for the next three to five (3-5) years. The strategic plan will examine our community's growth patterns and demographics and identify needs and services with respect to future trends and technologies, in addition to existing inequities and gaps. It will also identify relevant funding needs to respond to service demands and proposed infrastructure changes.

The goal of this project is to create a widely-supported strategic plan aligned with stakeholder and resident input, including but not exclusive to the following objectives:

- Ensure that library services and resources are in line with user needs and expectations.
- Boost visibility, awareness, and patronage among residents.
- Support initiatives to create and sustain a vibrant workplace that attracts and retains talented, creative, and service-oriented employees who feel supported in the often-challenging work of serving the public.
- Develop strategies toward long-term capital goals, including any building expansions or renovations identified as desirable by the public.

SECTION II: BACKGROUND

YDL is a Class VI district library on the eastern edge of Washtenaw County, Michigan. The district boundaries include the City of Ypsilanti, the Ypsilanti Charter Township, and the portion of Superior Charter Township outside the Ann Arbor Public School District. YDL's service population is just over 88,000 (2020 Census) and includes 37,000 borrowers, or 42% of the district.

The library is an independent taxing authority governed by an elected board of seven trustees who serve 4-year terms.

The library operates three separate locations: a 60,000 square-foot facility in Ypsilanti Township, a 12,000 square-foot branch in the downtown area of the City of Ypsilanti, and a 7,800 square-foot branch in Superior Township. In addition, a traveling Bookmobile makes regular routes through the community and frequent visits to area schools. This is an aged vehicle, and a year-end campaign to raise funds for a replacement began in 2025.

Administrative offices are located at the Whittaker Road location in Ypsilanti Township. Both the nonprofit organization Washtenaw Literacy and the volunteer-based Friends of the Ypsilanti District Library host their administrative offices on the first floor of the Whittaker Road facility. Office space is provided *gratis* by YDL.

YDL currently employs 82 staff members (including subs), 46 of whom are full-time, and 24 of whom hold the MLS degree. Staff in the librarian, clerk, and paraprofessional job classifications are part of AFSCME Local Union 3451. The latest collective bargaining agreement was ratified in July and covers the time period of June 1, 2025-May 31, 2028.

The library has seven public service departments (acquisitions, adult services, customer services, the Michigan Avenue branch, youth services, outreach services, and the Superior branch), and an operations team, which includes an assistant director, two IT staff, a facilities manager and staff, a business office manager, a receptionist, a communications coordinator, and a development coordinator, and a part-time volunteer coordinator/communications assistant. A new position of Security Coordinator is slated to begin in Spring 2026.

YDL is funded by four dedicated operating millages and its annual budget for 2025-26 is \$7,276,000. Three of these millages were voted in perpetuity (1993, 1998 and 2010). The most recent millage approved in 2018 for .7 mills expires 12/31/29. The library does not have any bond debt. Nearly 95% of YDL's budget comes from local property taxes.

YDL is a member of The Library Network (TLN) cooperative and participates in the statewide MelCat interlibrary loan program. Our current ILS, Polaris/Vega Discover by Clarivate/iii, is run internally by YDL staff and was migrated from SirsiDynix' Horizon in 2024.

The library publishes and sends via bulk mail its newsletter, **The Loop**, to all residents in the district (over 42,000 addresses) on a quarterly basis. The Library rebranded and transformed its newsletter into **The Loop** as part of a 2016 strategic plan. Changes included a greater focus on services (vs. programs), community partner columns, and a newsprint format, in response to the community's identification as a "news desert." Partial funding for this is provided by the Friends of YDL. A variety of electronic newsletters are sent to subscribers via email weekly, monthly, or quarterly, reaching over 4,500 people total.

Current Mission, Vision, and Core Value Statements

(Updated as part of the 2023 strategic plan)

Mission Statement

The Ypsilanti District Library builds community through discovery, education, and partnerships.

Vision Statement

We envision a thriving, highly-connected community supported by innovative resources and exciting learning opportunities.

Core Values

1. *Inclusion: Making sure everyone has access to the services and spaces of a high-quality library.*
2. *Community Focus: Understanding and responding to local needs in a constantly changing world.*
3. *Welcoming: Offering engaging staff and services that invite and inspire, in facilities where all feel welcome and secure.*
4. *Diversity: Reflecting and celebrating the differences within our community through staffing, collections, programs, and services.*
5. *Reinvention: Perpetuate excellent service by continuously adapting what we do to best support learning and growth.*
6. *Creativity: Encouraging lifelong exploration to develop the imagination.*

SECTION III: PAST STRATEGIC PLANS

(See <https://www.ypsilibrary.org/about/connect/strategic-plan/>)

The library's 2017-2022 strategic plan was an ambitious undertaking that resulted in considerable change and forward momentum. A professional phone survey of residents, a millage feasibility study, a space utilization study, a rebrand of the library, a new library branch, and additional activities moved YDL on a positive trajectory.

The 2023-2025 strategic plan was considerably less ambitious, especially coming out of the pandemic when many service variables were unknown. In addition, a catastrophic flood to the downtown branch in July of 2023 resulted in a years-long closure and partial renovation, the diversion of nearly \$500,000 in library funds, and the time and attention of the administrative team. For those reasons, the Plan was extended by one year.

SECTION IV: PROJECT SCOPE

The YDL is seeking an experienced, professional facilitator to perform the following:

- Facilitate the strategic planning process using a methodology effective for public libraries.
- Gather data through community research that focuses on library users, non-users, and stakeholders to identify needs over the next three-to-five (3-5) year period. Facilitate planning meetings and public input sessions.
- Identify and refine service priorities, goals, objectives, and activities.
- Identify gaps where current library operation is insufficient to meet those service priorities.
- Compile data as appropriate.
- Write and present the strategic plan that will be communicated to the library's stakeholders, including but limited to the staff, the Board of Trustees, and at least one community session.

The proposed plan should include:

- An up-to-date community profile and identification of library segment markets.
- An assessment of the library's environment, including evaluation of strengths and weaknesses, quality of services, reputation, management and budget, etc.
- Updated comparisons to peer libraries in the areas of community demographics, programs, services, finances, resources, space, etc.
- A review of current trends in library service and technology and an analysis of user expectations in regard to those trends.
- Recommendations for improvements to services, finances, collections, technology, marketing, and staffing.
- Methods for keeping the process and participants focused and on-task, ensuring that the hard questions are asked, addressed, and resolved.
- A built-in process for regular review, evaluation and adjustment to the plan resulting from changes in the economic, demographic, or political climate.

SECTION V: PROPOSAL CONTENT REQUIREMENTS

Proposals must include the following elements:

- A cover letter providing a brief description of the firm or individual, name, address of consultant, telephone number, and email address of principal contact person.
- Executive summary of the highlights of the proposal, which should not exceed one page in length, but convey the facilitator's understanding of the purpose and expected outcomes of this project.
- A list of key personnel who would be involved in the process, with a description of their backgrounds and areas of expertise.
- A summary of the consultant's qualifications and relevant experience, including evidence of knowledge of modern public library services, trends, and functions.
- A work plan that contains a description of the methodology, tasks, timeline, and an estimate of the amount of time that would be spent on the project.

- Exclusions or exceptions. Note any part of the proposal that is beyond the expertise of the consultant, or would be better handled by library staff or a third party.
- A project budget which includes consulting costs, clerical costs, and data analysis costs.
- Indicate a “not to exceed” total cost. Provide an estimate of the number of facilitator hours to be provided and the rate per hour. Any travel required by the facilitator, which is part of the normal scope of work, will be at the facilitator’s expense.
- A statement of the insurance carried by the facilitator and a signature by an individual authorized to bind the proposer, with a statement that the proposal is a firm offer for a 90-day period.
- References. Contact information for at least three organizations for which the facilitator has provided strategic planning services.
- One sample of a complete report which the facilitator has prepared for a similar project.

SECTION VI: SELECTION CRITERIA

Proposals will be reviewed and evaluated by the Library Director and the Library Board’s Strategic Planning Committee. Criteria for evaluation will include:

- Responsiveness of the written proposal to the purpose and scope of the project.
- Demonstrated knowledge, skills, and experience in conducting strategic planning projects for public libraries and other non-profits.
- Methodology for carrying out tasks in the scope of work.
- Reasonable proposed fees.
- Satisfactory performance record.
- Ability to meet deadlines and operate within budget.
- Excellent written and oral communications skills.

The Committee may, at its discretion, request one or more consultants attend a meeting, make a brief presentation, and answer questions posed by the Committee.

YDL reserves the right to select a strategic planning facilitator based directly on the proposal or to negotiate with one or more respondents.

YDL reserves the right to reject any and all proposals.

YDL will not reimburse costs of preparing the RFP responses. The Library reserves the right to cancel the award of contract at any time prior to the execution of the contract by both parties. The responding consultants bear sole risk and responsibility for costs incurred in the preparation and mailing of the proposal.

All information submitted shall be public record and subject to disclosure pursuant to the Michigan Freedom of Information Act. No Library Board or staff member shall have a financial interest in any proposal.

SECTION VII: SUBMISSION INFORMATION AND TIMEFRAME

Proposals are due by 5:00 p.m. Monday, March 9, 2026.

If submitting by mail, place submit one (1) original and four (4) copies of the completed proposal in a sealed envelope marked with the name and address of the consultant and STRATEGIC PLAN BID PROPOSAL. Send to:

**Lisa Hoenig, Director
Ypsilanti District Library
5577 Whittaker Road
Ypsilanti, MI 48197**

Electronic submission is also acceptable. Proposals should be e-mailed to Lisa@ypsilibrary.org with STRATEGIC PLAN BID PROPOSAL in the subject line.

From responses to this Request for Proposal, the Library Board Strategic Planning Committee will select facilitators to be interviewed virtually or by telephone. A contract will be awarded on or before Friday, April 17, 2026. YDL reserves the right to reject any and all proposals without penalty.

The facilitator is expected to present an orientation and brainstorming session on the strategic planning process to YDL staff at the YDL Staff In-Service Day on May 15, 2026.

A draft report/plan and executive summary are to be submitted to the Library Director by the end of September, 2026. The facilitator shall provide one unbound original and 8 copies of the draft report.

The final strategic plan and executive summary are to be presented by the facilitator in person at the October 28, 2026 Library Board of Trustees meeting. The facilitator will provide one unbound original and 8 copies of the final report. A copy of the final report must also be provided electronically. All raw and summary data is to be delivered to the Ypsilanti District Library at the conclusion of the strategic planning process.

SECTION VIII: TECHNICAL ASSISTANCE / CLARIFICATION

Any request for clarification of the information contained in this RFP must be submitted in writing by Monday, March 2, 2026, to:

**Lisa Hoenig, Director
Ypsilanti District Library
5577 Whittaker Road
Ypsilanti, MI 48197
E-mail: Lisa@ypsilibrary.org**

An interpretation of this RFP given by any person other than the Library Director shall be invalid.