

July 2024

# Proposal for Strategic Plan Development, Consulting and Facilitation Services

Winnefox Library System

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## Overview

WiLS, in partnership with the Winnefox Library System, will provide consulting and facilitation services to create a three-year strategic plan. The planning process will have three main phases:

1. Information gathering and stakeholder engagement
2. Strategic plan development
3. Plan Activation

The Winnefox Library System and WiLS will engage various stakeholders to learn more about the existing strengths and opportunities, member needs, and system aspirations to develop a multi-year strategic plan to guide decision-making for the system.

## Deliverables and Cost

Each phase is customizable to ensure the system has the process that will result in an inspirational and achievable strategic plan. Our proposals are built with an “a la carte”

approach that offers flexibility in design to meet organizational needs. The table below outlines a comprehensively designed approach based on our initial conversation with the system director and may be refined and customized before an MOU is written.

Project Phase & Associated Activities	Description	Timeline and Costs
<b>Stakeholder Engagement and Information Gathering</b>	We believe that hearing directly from system stakeholders and reliable data and information can help the system make the best decisions for its future. In this phase, we propose using a hybrid approach to ensure equity and reasonable costs. This means we will gather information virtually and in-person, synchronously and asynchronously, to engage staff, board, and system members where it will make the biggest impact.	March - June 2025 \$10,962.00
<i>Process kick-off meeting (virtual)</i>	WiLS will meet with the system director (and others selected by director) for a 90-minute session to start the planning process.	March \$690.00
<i>Research into existing library strategic plans in the library system</i>	WiLS will research member library strategic plans to understand member library needs and strategic directions better. WiLS will compile and theme the information gathered for the system director to review and inform the survey.	March \$345.00
<i>Staff SOAR meeting (in-person)</i>	WiLS will coordinate a process and facilitate a 3-hour meeting of system staff to perform a Strengths, Opportunities, Aspirations, and Results analysis. WiLS will document and theme information gathered during this process, which will be shared with the system director as part of the information gathered for developing the strategic plan.	April \$2,025.00
<i>Stakeholder Survey</i>	<p>WiLS will work with the system director to finalize the survey, determine the appropriate target audience, and provide an online version. With WiLS's input, the system will promote the survey to stakeholders.</p> <p>WiLS will compile the survey results into raw and visualized data for analysis.</p>	April - May Development and deployment \$1,840.00



	<i>Member director input workshop (in-person)</i>	WiLS will partner with the system to coordinate and facilitate a director input session. This will be up to a six hour, in-person session that will seek to understand member library needs and their vision for the system.	April/May \$2,542.00 (including travel)
	<i>Board questionnaire</i>	WiLS will share a short questionnaire with system board members and compile and theme results to share with the system director.	April/May \$460.00
	<i>Stakeholder interviews</i>	WiLS, with assistance from the system, will coordinate a series of 30-minute 1:1 interviews with system contractual partners. The interviews will provide qualitative data and insight into the system's strengths and opportunities. The interviews may be fully conducted by WiLS virtually or by phone.	May \$690.00 for 3 interviews
	<i>Data webinar</i>	WiLS will develop and deliver a 1.5-hour webinar to review the data and information gathered with the system director before the strategic plan development meeting. The system will be provided a slide deck of the compiled information and the data used for the slide deck and will be asked to complete a theming worksheet.	June \$1,668.00
<b>Plan Development</b>			July - August \$2,645.00 - \$3,341.00
	<i>Framework development meeting (virtual)</i>	WiLS will develop and facilitate a 2-hour strategic plan development meeting with the system director. The result of this meeting will be identification of strategic service goals for the system and initiatives that can be done to reach the goals.	July \$805.00
	<i>Plan Writing</i>	<p>WiLS will compile the planning meetings' results and other documentation (including, when relevant, the data and information gathered, assessed, and summarized during the planning process) to develop and write a strategic plan document.</p> <p>WiLS will coordinate a schedule with the system to finish writing the plan. WiLS will develop an initial draft of the plan and will coordinate with the director to create a final draft for presentation to the system board.</p>	July/August \$1,840.00



	<i>Graphic Design (optional)</i>	WiLS will add any desired graphic design elements when the draft is nearing completion. WiLS will provide the system with an easy mechanism to share photos and graphics they would like included in the final plan.	August \$690.00
<b>Plan Activation</b>			August/September \$1,150.00
	<i>Assessment meeting (virtual)</i>	Regular assessment and evaluation of your plan can provide clarity on implementing your strategic plan and seeing your system's achievements of its goals. Working with WiLS' data analyst, the system will learn how to set meaningful benchmarks and assess its strategic plan efforts. This will include a two-hour training session with up to 6-8 staff participants and tools and templates to easily and routinely assess efforts.	August/September \$1,150.00
	<i>Data audit and key indicators development (virtual)</i>	A data audit of your organization will provide you and your team a single repository of existing data sources to help inform current and future decision-making from an evidence-based foundation. In addition, WiLS' data analyst will assist in identifying meaningful library indicators for tracking and assessing key metrics into the future in relation to the library's new strategic plan.	August/September \$690.00

## Schedule of Costs

### Winnefox Library System

#### Project Cost

Costs per phase of the project are outlined in the table below.

Project Phase	Cost
Stakeholder engagement and information gathering	\$10,962.00
Plan development	\$3,341.00
Plan Activation	\$1,840.00
<b>Project total (not to exceed cost)</b>	<b>\$16,143.00</b>

\*The project total includes in-person meetings for the staff SOAR and a member engagement session. The total also includes some data gathering activities that the system may determine are not necessary. WiLS and the system director will fine tune the proposal prior to the development of a more formal memorandum of understanding. We are happy to customize the process to your needs. The total shown would not be exceeded.

#### Project Timeline (Estimated)

The project would start with the process kick-off meeting in late winter/early spring 2025, depending on system and WiLS availability. Depending on system availability and data collection, the process will be completed in summer 2025.

The prices and timeline in this proposal are locked in for 60 days from the date of sharing. Should the system need more time to make a decision, WiLS may need to revise the proposal.



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## Our Approach and Expertise

WiLS philosophy of work is evident in our mission:

*We believe libraries, cultural institutions, and their partners make the world a better place. We build relationships and provide services so they can do more with their time and money. We help our members turn ideas into action.*

We work hard so our project partners can have more, do more, and be more for their own communities. We harness our internal expertise, bringing in staff and their skills as the project requires, as well as expertise from among our partners if needed, to get the work done, to do it well, and to do it affordably.

Our work is guided by [our organizational values](#). We are optimistic and direct, unafraid to learn from our own occasional mistakes, who will ask after your families and pets. We sincerely care about your mission, we will do our best to support it, and we want our working relationship to continue after the project outputs are delivered; we want you to want to work with us again and to collaborate with our members and partners. We will learn from and with you as we work together and share that knowledge with our members. We really do believe that we are all in this together and that a strong community of practice amplifies work.

When you hire us, you get the whole team. WiLS' service experts have diverse skills and experiences and can be brought in, as needed, on any project. This keeps us flexible and responsive to the needs of different projects and helps us keep our eyes on the horizon to emerging and innovative practices from a variety of different vantage points.

## Key Personnel and Contact Information



**Melissa McLimans, Library Strategist & Consultant**, has nearly eight years of experience leading strategic planning processes with public libraries and library systems across Wisconsin. Melissa has worked with dozens of libraries and community stakeholders to develop, complete, and implement achievable strategic plans that reflect the needs of the organization and its stakeholders. Melissa is well-experienced in data

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collection, including administering community surveys, leading focus groups, and conducting interviews, as well as facilitating planning meetings and writing strategic plans. She has a deep knowledge of library and library system needs.

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**Laura Damon-Moore, Library Strategist & Consultant**, partners with her WiLS consulting team colleagues to offer manageable and dynamic planning projects that are community and asset-based. She brings a background in community engagement, community-led program development, and youth services, as well as significant project coordination, communications, and writing experience as co-founder of the Library as Incubator Project and @IArtLibraries.



**Kim Kieseletter, Data Analyst**, works on a variety of library-centric, data-driven projects with the WiLS consulting team. She brings with her over a decade of research and evaluation experience. Her background in the social sciences provides a foundation for her work, including extensive training in evaluation, research methods, and statistical analysis. Her approach to projects is warm, open, and accessible, and she focuses on intuitive and accessible deliverables.