



Memorandum of Understanding

WiLS and the Watertown Public Library for Strategic Plan Development, Consulting, and Facilitation Services

Purpose

This Memorandum of Understanding defines the parameters and costs of the Strategic Plan Development, Consulting, and Facilitation services WiLS will provide to the Watertown Public Library.

Contacts

Communication regarding this agreement and the services provided should be directed to:

WiLS

Melissa McLimans
1360 Regent St. #121
Madison, WI 53715
melissa@wils.org
(608) 515-8953

Watertown Public Library

Peg Checkai
100 South Water Street
Watertown, Wisconsin
pcheckai@watertownpubliclibrary.org
(920) 545-2322

Services and/or Deliverables

WiLS will provide the following services and/or outputs for Strategic Plan Development, Consulting, and Facilitation:

Project Phase & Associated Activities		Description	Tentative timeline
Phase 1: Setting the Stage		In this phase, we will kick off the strategic planning process with a look at community demographics. At a virtual kick-off meeting with the strategic planning team, we will get to know each other, discuss the process, review available data, and start community mapping.	Dependent on receipt of the MOU, September 2025 process kick off meeting
	<i>Demographics Workbook</i>	WiLS provides a snapshot of the library's service area/community demographics, pulling from different federal and state data resources. The planning team will use the information gathered during this process to develop a community map.	
	<i>Planning Team Questionnaire</i>	WiLS will administer a questionnaire to the planning team to develop an understanding of library and community aspirations, issues, and needs.	
	<i>Strategic Planning Kickoff Meeting (virtual)</i>	WiLS will facilitate a 90-minute virtual kickoff meeting with the planning team. The meeting's agenda will include 1. An overview of the process, including the phases and associated activities, to develop a timeline/calendar for the process 2. An overview of the planning team's role 3. A review of questionnaire response 4. Community mapping start and tool review 5. Time for questions and suggestions	
Phase 2: Stakeholder Engagement		We believe that hearing directly from the community helps your library make the best decisions for its future. In this phase, we propose using a data-gathering approach that is both evaluative and future-facing and utilizes qualitative and quantitative data.	October - December 2025
	<i>Library Staff SOAR (in-person)</i>	WiLS will coordinate and facilitate a three-hour meeting of library staff utilizing the SOAR method (Strengths, Opportunities, Aspirations, and Results). This meeting will be held using in-person facilitation.	

<i>Library Board Conversation (in-person)</i>	WiLS will facilitate a 60-90 minute discussion of the library board. This discussion will focus on gathering information about the challenges and aspirations of the community, and the strengths, opportunities, and aspirations of the library, including the board.
<i>Community Survey</i>	WiLS, in partnership with the library, will administer a community survey that is available online and in hard copy. The time and cost reflected here are for the base community survey, which asks questions to understand usage, perception, and satisfaction related to library services, as well as optional basic demographic questions. Additional questions or extensive edits to the base survey may result in additional hours and costs. WiLS will include survey promotion tips in the broader communications plan. WiLS will provide the library with a Spanish-language version of the survey at no additional charge. WiLS will analyze the survey results. Top-level findings will be shared in the data webinar.
<i>Data Dashboard Access & Tour (virtual)</i>	The planning team will be given access to a dashboard created and hosted by WiLS. This dashboard takes DPI Annual Report data into a visualized format that allows you to see an individual library's data for up to the previous five years and a look at your library compared to a cohort average of similar libraries, identified through statistical modeling. The dashboard also includes some basic descriptive statistics of specific measures. This includes access to the dashboard for the period of the project as well as an hour-long virtual tutorial with WiLS' Data Analyst to walk the director/planning team through how to use the dashboard. This may be delivered as a recorded webinar. Top-level findings will be shared in the data webinar.
<i>Stakeholder Interviews</i>	WiLS, with assistance from the library, will coordinate 5 30-minute 1:1 interviews with library and community stakeholders. The interviews will provide qualitative data and insight into community strengths and opportunities and what catalyzing role the library might play. The interviews may be conducted by WiLS virtually or by phone.
<i>Donor Questionnaire</i>	WiLS, with assistance from the library, will develop a brief questionnaire for the library to send to past/recent donors to evaluate their support and connection to the library. WiLS will provide top level findings.

	<i>Community Conversations</i>	WiLS, with assistance from the library, will coordinate 2 community conversations with selected community participants to gather information about how the library can align its resources and services to best support community aspirations and needs. WiLS will provide a facilitator to lead the conversations and a notetaker to document the input gathered during the conversations. WiLS will compile and theme the results of the conversations.
	<i>Community Leaders questionnaire</i>	WiLS will provide a Library and Community Landscape Questionnaire for city leaders to gather input. WiLS will compile and theme the information gathered.
	<i>Community Q&A Boards (in-library)</i>	WiLS will provide a basic handout and a how-to for library staff on creating community “Q&A” boards at library locations. This passive, interactive activity will pose a set of future-facing questions to explore community strengths, opportunities, and possible roles for the library. Note: This activity will require 3-4 hours of library staff time to prep and set up the stations, monitor them throughout their “open” period, and then to take and share photos of the responses with WiLS. WiLS will theme the responses and present the findings at the data webinar.
Phase 3: Development of the Strategic Plan & Strategic Plan Deliverable		WiLS will share with the planning team a review of data and information and meet to develop a strategic plan that articulates a vision for the library, develops key focus areas, highlights strategic initiatives, and establishes goals and objectives. January - February 2026
	<i>Data Webinar (virtual)</i>	WiLS will develop and share a recorded webinar to review the data and information gathered with the planning team in advance of the strategic plan development meeting. The team will be provided with a slide deck of the compiled information and the data used for the slide deck.
	<i>Theming Worksheets</i>	WiLS will provide planning team members with a worksheet to capture their ideas about themes and important ideas that emerged during the data and information-gathering phase.
	<i>Framework Meeting (in-person)</i>	WiLS will develop processes and provide facilitation services for a 2-hour strategic plan development meeting of the planning team. The result of this meeting will be the finalization of strategic goals and measurable objectives.
	<i>Plan Writing</i>	WiLS will compile the results of the framework meeting to include with other documentation to develop and write a strategic plan document. WiLS will coordinate a schedule with the library to finish writing the plan and obtain any feedback from appropriate stakeholders. WiLS allocates 16 hours for writing the strategic plan document. If additional writing time is requested beyond the

		16 hours, an adjusted cost for this component will be required.	
	<i>Graphic Design and Editing Process</i>	If desired, when the draft is nearing completion, WiLS can add desired graphic design elements and provide the library an easy mechanism to share photos and graphics they would like included in the final plan document.	
Phase 4: Meaningful Assessment of Your Strategic Plan			February/March 2026
	<i>Assessment meeting (virtual)</i>	Regular assessment and evaluation of your plan can provide clarity on implementing your strategic plan and seeing your library's achievements of its goals. Working with WiLS' data analyst, the library will learn how to set meaningful benchmarks and assess their 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.	
	<i>Development of a communication plan</i>	Working with the library director and at least one board member and utilizing a questionnaire, WiLS will draft a communication plan for strategic plan implementation in order to keep stakeholders, both internal and external, informed, engaged, and aligned with the strategic goals and initiatives of the library.	

Schedule of Costs

Watertown Public Library

Project Cost

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

Project Phase	Cost
Phase 1: Setting the Table	\$1,624.00
Phase 2: Learning About the Library and Community	\$10,474.00
Phase 3: Plan Development	\$5,916.00
Phase 4: Meaningful Assessment	\$1,892.00

TOTAL PROJECT COST (not to exceed)	\$19,906.00
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Cost Allocations and Terms of Agreement

It is anticipated that the services described above will have a total project cost of \$19,906.00.

Costs include all preparation time; facilitation time; travel for in-person meetings, and supplies/technology for facilitation processes and documentation development. Should additional meetings, activities, or time be required, WiLS will provide the Watertown Public Library with an estimate for additional costs.

Payment Schedule

Upon signed return of this MOU:	\$4,975.00
Upon completion of project:	\$14,931.00 (not to exceed)

Duration of Agreement & Timeline

WiLS and the Watertown Public Library will work together to identify a timeline of the different activities to complete each phase of service. If either WiLS or the Watertown Public Library needs to alter the previously agreed-upon timeline, such alterations should be made prior to the deadline date of the activity that will need to be rescheduled. If deadlines are repeatedly not met by the Watertown Public Library without communicating with WiLS, WiLS reserves the right to change the project timeline with the Watertown Public Library's approval of the new timeline. If the change in timeline will result in overlap with other projects to the extent that WiLS will not be able to complete the work with existing staff resources, WiLS reserves the right to delay the project to a mutually agreed upon time or, the parties may cancel the project if they mutually agree to do so.

Other Terms

Other Terms

- By signing below, the planning partner acknowledges reading, understanding, and accepting WiLS' approach to [survey demographics](#).
- As part of the above costs, WiLS calculates approximately an hour per month of communication time with the library to coordinate next steps, answer questions and discuss any potential changes to the project. This is beyond the meetings scheduled in the different phases of the project as documented in each phase of the MOU. Should communication be required by the library beyond this amount of time each month, WiLS will discuss with the library either creating a communication plan to maintain

communications within this time range or providing a cost estimate to provide more communication time for the project.

- WiLS is officially open from 8 a.m. to 5 p.m. Monday through Friday. In some planning processes, WiLS will work with the library/organization to facilitate meetings that will end after 5 p.m. In most cases, work will be completed by 7:30 p.m. Emails from WiLS may be sent only during the hours of 7 a.m. and 6 p.m. on officially open days. WiLS will not send emails or make calls on weekends or holidays. When a holiday falls on a Saturday, it is observed on the day prior (Friday). If a holiday falls on a Sunday, it is observed the next day (Monday.)
- A strategic planning process is often an iterative process. There may be points during the planning project where information is discovered that leads to potentially adding or removing a step or two to the planning process. When this occurs, if requested, WiLS will provide a cost estimate to perform the additional work.
- All files, records, documents and similar items relating to the Watertown Public Library, whether prepared or received by WiLS for the purpose of performing this MOU are and shall remain the property of the Watertown Public Library and are considered public documents. The exception to this is the Annual Report Data Dashboard. The Watertown Public Library will have access to this dashboard for the course of the project and is able to make copies of the data and visualization during the process.
- Access to files, records, and documents that are part of WiLS' platforms (i.e. Google Drive, Dropbox, or Basecamp) will cease 60 days after the final project invoice is sent.
- Should the library wish to have WiLS travel to the library for additional meetings, the library will be charged \$533.00 per trip. This includes travel time and mileage. Travel will also be dependent upon consultant availability.

Alteration or Termination

During the course of the agreement, the contracting parties have the right by mutual agreement to suspend work at any time and, in that event, WILS will be paid a mutually agreed amount for work performed and expenses incurred by WILS in the performance of this MOU through the time of suspension. Similarly, the parties may, by mutual agreement, terminate the MOU before completion, pursuant to such financial and other terms as they mutually agree.

Agreed to and accepted by:

WILS

Jennifer
Chamberlain

Digitally signed by Jennifer
Chamberlain
Date: 2025.08.25 07:14:55 -05'00'

Signature

Jennifer Chamberlain

Name

8/25/25

Date

Watertown Public Library

Peg Checkai

Signature

Peg Checkai

Name

8/25/2025

Date