



January, 2025

Proposal for Strategic Plan Development, Consulting, and Facilitation Services

Watertown Public Library



Overview

WiLS, in partnership with the Watertown Public Library will provide consulting and facilitation services in order to create a five-year strategic plan. The planning process project will have four phases:

1. Setting the stage for planning
2. Stakeholder engagement
3. Strategic plan development
4. Meaningful assessment of your strategic plan

The Watertown Public Library and WiLS will engage various stakeholders to learn more about their aspirations for the community and their needs for the library. Community engagement will

be supplemented with robust quantitative data collection and analysis to ensure the strategic plan will be data-informed and meet the needs of the community and the library.

Deliverables and Cost

Each phase is customizable to make sure your library has the process that will result in an inspirational and achievable strategic plan. For any meetings that require travel, the cost will reflect travel time and mileage (\$533.00 per travel event). Not all meetings benefit equally from being in person, and WiLS is able to conduct all aspects of the planning process virtually.

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.	March/April 2025
	<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 <ol style="list-style-type: none"> 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.	April-August 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>	<p>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.</p> <p>WiLS will provide the library with a Spanish language version of the survey at no additional charge.</p> <p>WiLS will analyze the survey results. Top-level findings will be shared in the data webinar.</p>
<i>Data Dashboard Access & Tour (virtual)</i>	<p>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.</p> <p>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.</p> <p>Top-level findings will be shared in the data webinar.</p>
<i>Stakeholder interviews</i>	<p>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.</p> <p>The interviews may be conducted by WiLS virtually or by phone.</p>
<i>Donor Questionnaire (optional)</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>Short survey for teens (optional)</i>	Working with library staff, WiLS will develop a very short survey for staff to administer to teen patrons to better understand their needs.
	<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 (optional)</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 (optional)</i>	<p>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.</p> <p>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.</p>
Phase 3: Development of the Strategic Plan & Strategic Plan Deliverable		<p>WiLS will share with the Strategic 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.</p> <p>August - September 2025</p>
	<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>This meeting can be virtual, but we recommend in-person if possible.</i>
	<i>Plan Writing</i>	WiLS will compile the results of the planning 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		September/October 2025
	<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 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.

Cost to Perform

The cost for each phase and activity is outlined in the table below.

Phase & Activity	Cost
Phase 1:	\$ 1,624.00
Demographics workbook	\$464.00
Planning team questionnaire	\$464.00
Strategic Planning Team Kickoff Meeting (virtual)	\$696.00
Phase 2: Community, Board, & Staff Engagement	\$9,314.00 - \$12,167.00
Library Staff SOAR (in person)	\$1,635.00
Board conversation (in-person)	\$1,171.00
Community survey	\$1,856.00
<i>City leaders questionnaire (optional)</i>	<i>\$464.00</i>
Data Dashboard access & tour (virtual)	\$696.00
Stakeholder interviews (virtual)	\$232.00- up to 5 \$1,150
<i>Donor questionnaire (optional)</i>	<i>\$696.00</i>
Community conversations (2 - in-person)	\$2,226.00
<i>Community Gathering (in-person) optional</i>	<i>\$1,693.00</i>
<i>Short survey for teens (optional)</i>	<i>\$696.00</i>

Community Q&A boards	\$580.00
Phase 3: Development of the Strategic Plan & Strategic Plan Deliverable	\$ 5,916.00
Data webinar (recorded)	\$1,682.00
Framework meeting (in-person)	\$1,682.00
Plan writing	\$1,856.00
Graphic design & editing	\$696.00
Phase 4: Meaningful Assessment	\$ 1,160.00 - \$1,892.00
Assessment meeting (virtual)	\$1,160.00
<i>Communication plan (optional)</i>	<i>\$732.00</i>
Note: Travel (per travel event)	\$ 533.00
TOTAL PROJECT RANGE	\$ 18,014.00 - \$21,599.00

*The lower range total does not include any optional components. The higher amount reflects all of the possible information gathering and mostly in-person meetings. The higher total is a not to be exceeded amount.

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

Key Staff

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 of emerging and innovative practices from various vantage points.



Melissa McLimans, Library Strategist & Consulting Team Lead, has almost ten years of experience leading strategic planning processes with public libraries and library systems. Melissa has worked with dozens of libraries and community stakeholders to develop, complete, and implement achievable strategic plans that reflect the needs of organizations and their stakeholders. Melissa is well-experienced in data collection, including administering community surveys, leading focus groups, and conducting interviews, as well as facilitating planning meetings and writing strategic plans.



Laura Damon-Moore, Library Strategist & Consultant, partners with her 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. In addition, Laura has a certificate in Asset-Based

Community-Led Development (ABCD), which she uses as a lens for much of her work with libraries.



Kim Kieseewetter, Data Analyst & Consultant, 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 focuses on intuitive and accessible deliverables.