



**Oshkosh Public Library  
Strategic Plan Consulting and Facilitation Services  
Memorandum of Understanding  
November 27, 2019**

**Introduction**

The purpose of this memorandum of understanding (MOU) is to define the parameters and costs of the Strategic Plan Consulting and Facilitation Services WILS will provide to the Oshkosh Public Library.

**Contacts**

Communication regarding this proposal should be directed to:

WILS

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Oshkosh Public Library

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**Overview of Process**

The process outlined in this draft is intended to refresh and revitalize the actions and strategies that the library can execute in the next 5 years to reach the vision and goals of its current strategic plan. The focus of the actions and strategies will be to increase the library's outward engagement with the community and the use by and impact of library services for all members of the community.

The library will form a team of staff that will work with WILS throughout this process to:

- assist WILS with process logistics and adapting process activities as needed to best reach the goals of the process to refresh and revitalize the strategic plan,
- review data and information as needed and assist with the drafting/review of any written documentation that will be used for this process or be the result of this process,
- facilitate the inclusion of other library staff, as needed, to gather their input and help coordinate activities with staff to identify their roles and involvement in the implementation the plan's actions and strategies.

## **Process Deliverables**

### 1 - Data Analysis

WiLS will review DPI Annual Library Report and demographic data to create an understanding of trends and identify potential issues and opportunities for the library related to its vision and goals. The result of this work will be a summary report of findings that will be used to inform and guide the other activities of this process.

Cost: \$1,200.00

### 2 – Staff Strengths, Opportunities, Aspirations and Results (SOAR) Brainstorming Session

WiLS will facilitate an in-person meeting of staff or a focus group of staff to identify library strengths, opportunities, aspirations and results. Participants will be provided with the current strategic plan vision, goals and objectives and the data and information summary report that will be used to guide and inform this session.

Cost: \$1,200.00

### 3 – Review and Update of the Current Strategic Plan Goals and Objectives

WiLS will facilitate a process to review and update the current strategic plan goals and objectives to better reflect the focus of outward community engagement to better serve all community members. This will include:

- WiLS facilitating an in-person meeting of the planning team to create potential newly edited drafts of the current goals and objectives. The planning team will be provided the current strategic plan vision, goals and objectives, the data and information summary report and the results of the staff SOAR session to inform and guide this work.
- WiLS and the planning team providing a mechanism for other library staff to provide feedback on any revision drafts of current goals and objectives.
- WiLS facilitating a final drafting of revised goals and objectives with the planning team.

Cost: \$1,600.00

### 4 – Identification and Development of a Framework of Potential Actions, Strategies and Assessments for the Strategic Plan Goals and Objectives

WiLS will facilitate a process with the planning team that will include:

- a community asset mapping activity planning team members will do individually to provide to WiLS,
- using the data summary report, the results of the staff SOAR session and the community mapping activity, WiLS facilitating an in-person meeting with the planning team to:
  - create a framework of actions and strategies to reach the strategic plan goals and objectives, including establishing an annual process for ongoing plan implementation and prioritization

- create an assessment guide (metrics and evaluation) to be used to measure and guide the implementation of actions and strategies and their success at meeting objectives and reaching goals,
- WiLS working with the planning team via email and online meetings to fine tune the framework of actions and strategies and the assessment guide – note that the framework and guide will be able to be used by the library to guide the development of internal library sub-plans for programming, technology, community engagement, facility, and marketing for them to align with the strategic plan,
- WiLS working with the planning team to provide mechanisms to get feedback from the library board and other staff on the overall updated strategic plan draft including the updated goals and objectives, the actions and strategies framework, and the assessment guide.

Cost: \$2,400.00

5 – Finalizing the Refreshed and Revitalized Strategic Plan and Staff Education

- WiLS will work with the planning team via email and online meetings to create a final version of the refreshed and revitalized strategic plan to share with the library board for approval.
- WiLS will work with the Library Director and other staff leadership, as determined by the director, to develop an in-person meeting with staff that WiLS will facilitate to educate staff on use and importance of the strategic plan, how the strategic plan is intended to function on an operational level, and the staff’s role in implementing and living the strategic plan in their work.

Cost: \$1,600.00

**Costs and Terms of Agreement**

Costs include all preparation time; facilitation time; travel and mileage expenses; and supplies for facilitation processes and documentation development.

Payment Schedule

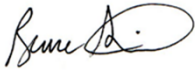
Upon start of project:	\$2,000.00
<u>Upon completion of project:</u>	<u>\$6,000.00</u>
Total:	\$8,000.00

Terms

- During the course of the agreement the contracting parties have the right to stop work at any time and WiLS will be paid for any work and expenses incurred through the time of cancellation. The library will be provided with the results of any work done by WiLS up to the time of the project being stopped.
- A strategic planning process is often an iterative process. There may be points during the planning project where information is discovered that leads to the 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 for the library to consider for approval.

Agreed to and accepted by:

**WILS**



\_\_\_\_\_  
Signature

\_\_\_\_\_  
Bruce Smith

Name

\_\_\_\_\_  
Community Liaison

Title

\_\_\_\_\_  
November 26, 2019

Date

**Oshkosh Public Library**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date