



Memorandum of Understanding for Strategic Planning Services
WiLS and Waukesha Public Library
December 9, 2016

Introduction

The purpose of this MOU is to define the parameters and costs of the Strategic Plan Development, Consulting and Facilitation Services WiLS will provide for the Waukesha Public Library.

Contacts

Communication regarding this proposal should be directed to:

WiLS

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Waukesha Public Library

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Create Planning Committee

- Who: composed members of the board and staff as determined by the Library Director.
- Role: the committee will attend all meetings and be the team that works with WiLS to develop a strategic plan.

This process will consist of facilitated planning sessions led by WiLS to develop a strategic plan for the library. It will also include the development and administration of a community survey and providing the library with a one on one patron survey toolkit to gather information related to their user experience. During this process WiLS will also gather DPI annual report data to provide comparisons to similarly sized libraries and demographic information about the community.

For each planning session, WiLS will:

- Create agenda and process activities
- Compile and provide information needed for a session for committee members
- Document plan development during sessions
- Facilitate sessions

- Organize, coordinate and perform in-between session activities and tasks
- Coordinate and schedule sessions with the library

Planning Session 1 (approximately 2 hours)

- Identify community and library needs, issues, opportunities and challenges. Prior to this meeting WiLS will provide the planning committee with a questionnaire to gather information to assist with this step.
- Review community survey template and adapt as needed.
- In addition to the planning session with the committee, WiLS will meet with the library management team to review the toolkit the library will use to gather information for patrons at the library related to their user experience.

Community Survey and User Experience Information Gathering

- WiLS will work with the library to administer a community survey to area residents. The survey will focus on the broader community and its perceptions of the library, in addition to specific service and usage questions. The library, with input from WiLS, will promote the survey to area residents through channels that will likely result in getting a high response rate. This will be a survey of convenience.
- Concurrent to the community survey being administered, the library will use the one on one patron survey toolkit related to user experience to gather information that will be compiled with the community survey.

Planning Session 2 (approximately 2 hours)

- WiLS will compile and present the data and information gathered from the community survey and other sources as noted in this MOU. This will be an in-person session with the planning committee to review and discuss the information gathered to prepare for Session 3, the strategic plan development meeting.

Planning Session 3 (approximately 4 hours)

- WiLS will facilitate a half-day in-person strategic plan development meeting of the library planning committee. The result of this meeting will be identifying strategic service goals and objectives for the library and initiatives that can be done to reach the goals and objectives.

Strategic Plan Writing

- WiLS will draft an initial plan document that will include all components of the plan and ongoing planning process as developed during the 5 planning sessions.
- WiLS will work with the planning committee to edit and create a final draft of the strategic plan document.

Implementation and Assessment Planning Session (approximately 4 hours)

- Following the completion of the strategic plan, with the library management team, WiLS will facilitate the development of a framework for an ongoing planning assessment, prioritization and implementation process that will be scheduled and coordinated on an annual basis. WiLS will compile the results of session and prepare an ongoing process document for the library.

Planning Costs

Planning Session 1: \$1,150.00

- Session includes 6 hours WiLS time for meeting facilitation and driving time and 8 hours of WiLS time for pre and post session work. This includes mileage expenses and supply costs for facilitating the session.

Community Survey & Data Gathering: \$1,850.00

- Includes 24 hours of WiLS time to develop the community survey, one on one patron user experience survey toolkit, gather DPI and demographic data, compile and organize data and information for presentation to the committee.

Planning Session 2: \$1,150.00

- Session includes 6 hours WiLS time for meeting facilitation and driving time and 8 hours of WiLS time for pre and post session work. This includes mileage expenses and supply costs for facilitating the session.

Planning Session 3: \$1,325.00

- Session includes 8 hours WiLS time for meeting facilitation and driving time and 8 hours of WiLS time to prepare for the session. This includes mileage expenses and supply costs for facilitating the session.

Strategic plan writing: \$ 900.00

- 12 hours of WiLS time to draft plan and create final draft with input from planning committee.

Implementation and Assessment Planning Session: \$1,325.00

- Session includes 8 hours WiLS time for meeting facilitation and driving time and 8 hours of WiLS time to prepare for the session. This includes mileage expenses and supply costs for facilitating the session.

Total Cost: \$7,700.00

Payment Schedule:

Due at start of project: \$2,000.00

Due upon delivery of written strategic plan: \$5,700.00

Cancellation of the agreement:

- 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.

Other Terms:

- Consultation can often be an iterative process. There may be points during the consultation process where information is discovered that leads to a need or request for additional consultation beyond the scope of this agreement. When this occurs, if requested, WiLS will provide a cost estimate to perform the additional work.

Agreed to and accepted by:

WILS



Signature

Bruce Smith

Name

Community Liaison

Title

December 9, 2016

Date

Waukesha Public Library

Signature

Name

Title

Date