



Statement of Qualification Requirements

WiLS (Wisconsin Library Services) was first established in 1971. Since that time our organization has evolved as a non-profit, member driven organization to work with libraries throughout Wisconsin providing a number of services to help members turn ideas into action and increase their potential through collaboration. In 2013, WiLS went through a reorganization process that resulted in a redesign of services with consulting services, including strategic planning, being one of the core services of the reorganization.

Our goal is to develop processes that strengthen our members, and, therefore, the overall Wisconsin library community. Through thoughtful conversation, we work closely with our members to determine the best course of action for them to reach their goals within their existing budget. We find ways to leverage existing resources and partnerships as appropriate.

As part of the Wisconsin library community, we bring strong relationships, a solid understanding of the Wisconsin library landscape, and an awareness of techniques and processes being employed throughout the state. We see the strengthening of relationships between the library and the community as key outcome to a successful strategic planning process and, thus, our planning process has the community as the central focus of the process.

Our goal with a strategic planning process is to not only work with the library to identify opportunities, needs and issues through data gathering and community engagement to create the framework and vision of the strategic plan, but provide the library with tools to empower the library to continue to assess opportunities and engage with the community on an ongoing basis.

Bruce Smith and Melissa McLimans are the lead consultants for strategic planning and their résumés are attached to this Statement of Qualification Requirements. We have read and understand all conditions of the proposal.

Completed strategic planning projects in the past three years

Library Systems

Milwaukee County Federated Library System, Strategic Plan for 2015-17

BRUCE GAY

414-286-8149

BRUCE.GAY@MCFLS.ORG

Nicolet Federated Library System, Strategic Plan for 2015-17

MARK MERRIFIELD (RETIRED)

Waukesha County Federated Library System (Now Bridges Library System), Strategic Plan for 2015-17

CONNIE MEYER

262-896-8081

CMEYER@BRIDGESLIBRARYSYSTEM.ORG

Winding Rivers Library System, Strategic Plan for 2016-17

KRISTEN ANDERSON

608-789-7119

KRISTEN@WRWSWEB.ORG

Public Libraries

Brown Deer Public Library, facilitation of focus groups and consultation on the development of the libraries strategic plan. 2015.

BRIAN WILLIAMS-VAN KLOOSTER

414-371-2965

DIRECTOR@BROWNDDEERLIBRARY.ORG

Columbus Public Library, 2015 Strategic Plan

CINDY FESEMYER

920-623-5910

CINDY@COLUMBUSPUBLICLIBRARY.INFO

Community Public Library, Strategic Plan for 2017-22

LEEANN BRIESE

262-843-3348

LBRIESE@COMMUNITYLIB.ORG

L.E. Phillips Memorial Library (Eau Claire), Strategic Plan for 2016-20

JOHN STONEBERG

715-839-5001

JOHNS@EAUCLAIRE.LIB.WI.US

MARK TROENDLE

715-839-5001

MARKT@EAUCLAIRE.LIB.WI.US

Fond du Lac Public Library, Strategic Plan for 2017-22

JONMARK BOLTHOUSE

920-322-3959

BOLTHOUSE@FDLPL.ORG

Dwight Foster Public Library (Fort Atkinson), Strategic Plan for 2016-20

AMY LUTZKE

920-563-7790

ALUTZKE@FORTLIBRARY.ORG

Jefferson Public Library, Strategic Planning in 2016

LEANN SCHWANDT LEHNER

920-674-7733

LLEHNER@JEFFERSONWILIBRARY.ORG

Johnson Creek Public Library, Strategic Plan for 2015-2018

LUCI BLEDSOE (RETIRED)

L.D. Fargo Public Library (Lake Mills), Strategic Plan for 2016-20

GERARD SAYLOR

920-648-2166

GERARDSAYLOR@LAKEMILLS.LIB.WI.US

Menomonee Falls Public Library, Strategic Plan for 2017-22

KAROL KENNEDY

262-532-8931

KKENNEDY@MENOMONEE-FALLS.ORG

Muskego Public Library, Strategic Plan 2017-19

PETE LOEFFEL (NO LONGER AT THE LIBRARY)

Sun Prairie Public Library, Strategic Plan for 2017-22

SVETHA HETZLER

608-825-0900

SHETZLER@SUNLIB.ORG

Pauline Haass Public Library (Sussex), Strategic Plan for 2017-19

KATHY KLAGER

262-246-5180

KBKLAGER@PHPL.LIB.WI.US

Karl Junginger Public Library (Waterloo), Strategic Plan for 2017-2020

KELLI MOUNTFORD

920-478-3344

KMOUNTFORD@WATERLOO.LIB.WI.US

Qualification Evaluation Checklist

Instructions:

1. Please answer each question below. You may add comments beneath any question that needs further explanation.
2. Determination of Contractor qualifications will be determined using this checklist along with the proposal, references, and information provided in the Statement of Qualifications.
3. Firms are expected to answer "YES" to some, but not necessarily all of the checklist items.

YES	NO	Library Strategic Planning Consultant
☐	X	1. Has your firm ever failed to complete any work awarded to it? Comments:
☐	X	2. Has your firm ever defaulted on a contract? Comments:
X	☐	3. Does the firm have experience working with municipal libraries? Comments:
X	☐	4. Is your firm willing to provide (at no cost to the Library) an on-site or webinar presentation to the Waukesha Public Library Board regarding the firm's qualifications and/or proposal if requested? Comments:
X	☐	5. Has your firm performed Library strategic planning for other municipalities in Wisconsin in the year 2015, 2016, or 2017? Comments:
X	☐	6. Has your firm demonstrated success in strategic planning services? Comments:

YES

NO

X

☐

7. Does your firm have experience in soliciting community input in the planning process:

Comments:

X

☐

8. Does your firm have experience using multiple communication platforms (for example: social media and online surveys) for public input solicitations?

Comments:

X

☐

9. Is your firm familiar with Library-specific planning strategies?

Comments:

X

☐

10. Have you reviewed the example of the service contract attached and are you willing to sign a similar agreement?

Comments:

Subcontractors and Suppliers Listing

Following is a list of subcontractors the vendor plans to employ to complete work related to strategic planning. The vendor agrees not to alter or add to such list without the written consent of the Waukesha Public Library. Use separate sheet as necessary.

	<u>SUBCONTRACTOR</u>	<u>CLASS OF WORK</u>
1)	N/A	
2)		
3)		
4)		
5)		

Following is a list of **suppliers** to be used on the above listed project (if applicable). Use separate sheet as necessary.

	<u>SUPPLIER</u>	<u>TYPE OF SUPPLY</u>
1)	N/A	
2)		
3)		
4)		
5)		

Submitted by: COMPANY _____ WiLS _____

Subcontractors and Suppliers

Contractors and subcontractors are to be paid for their work on the basis of the contract. The contractor is to be paid for the work done by him and his subcontractors. The subcontractors are to be paid for the work done by them.

Subcontractor	Supplier
1. Subcontractor	1. Supplier
2. Subcontractor	2. Supplier
3. Subcontractor	3. Supplier
4. Subcontractor	4. Supplier
5. Subcontractor	5. Supplier

The contractor is to be paid for the work done by him and his subcontractors. The subcontractors are to be paid for the work done by them.

Subcontractor	Supplier
1. Subcontractor	1. Supplier
2. Subcontractor	2. Supplier
3. Subcontractor	3. Supplier
4. Subcontractor	4. Supplier
5. Subcontractor	5. Supplier

The contractor is to be paid for the work done by him and his subcontractors. The subcontractors are to be paid for the work done by them.

References

Name of the Firm: WiLS

Reference #1

Library Name: Menomonee Falls Public Library

City, State, and Zip Code: Menomonee Falls, WI 53051

Telephone: (262) 532-8931

Contact Person: Karol Kennedy

Type of Service(s) Provided: Strategic Planning

Calendar Year(s) of Service(s) Provided: 2017

Reference #2

Library Name: Fond du Lac Public Library

City, State, and Zip Code: Fond du Lac, WI 54935

Telephone: (920) 322-3959

Contact Person: Jon Mark Bolthouse

Type of Service(s) Provided: Strategic Planning

Calendar Year(s) of Service(s) Provided: 2016-17

Reference #3

Library Name: Sun Prairie Public Library

City, State, and Zip Code: Sun Prairie, WI 53590

Telephone: (608) 825-0900

Contact Person: Svetha Hetzler

Type of Service(s) Provided: Strategic Planning

Calendar Year(s) of Service(s) Provided: 2016-17

10-10-1944

The first part of the report is devoted to a description of the work done during the last few days. It is a very interesting and detailed account of the work done in the laboratory. The second part of the report is devoted to a description of the work done during the last few days. It is a very interesting and detailed account of the work done in the laboratory.

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Bruce Smith

Qualifications

- Trained facilitator that includes participation in the American Library Association's Libraries Transforming Communities 18-month community engagement grant program.
- Extensive background as a public service program leader responsible for budget development and personnel management
- Committed to continuous improvement of services and maximizing use of resources through data analysis, research, and testing
- Established reputation in service development, project management, and strategic planning

Professional Experience

Community Liaison and Service Specialist | WiLS (Wisconsin Library Services) • July 2013 – Present

Accomplishments

- Project manager leading a multi-year Public Library System Redesign process funded by the Department of Public Instruction to improve models for coordinated services to 384 public libraries in Wisconsin.
- Designed a new delivery service model for Southwest Wisconsin Library System and Cooperative Educational Service Agency 3 that increased service to their 64 members by 50% while saving each organization more than \$20,000 annually.
- Developed consulting and project management as new service areas for WiLS and have grown annual revenue for these services from zero to nearly \$250,000 in a little over three years.
- Facilitated the merger of two regional public library systems into a single four-county system resulting in improved service efficiency and effectiveness, increased purchasing power, and more resources for library users.

Responsibilities

- Coordinate organizational consulting and strategic plan development for libraries and other institutions by providing process facilitation; gathering and analyzing data; developing, administering, and interpreting surveys; engaging community stakeholders; and establishing metrics for assessing success.
- Provide large-scale project management, facilitation, and collaborative negotiation for local and statewide initiatives involving libraries, governmental agencies, and non-governmental partners; develop and deliver communications, reports, and presentations to stakeholders and decision-makers.
- Perform lean workflow and service cost analysis and provide change implementation planning to improve logistical support systems for library services to increase organizational efficiency, provide more effective services, and maximize use of resources.
- Developed and negotiated cooperative purchasing agreements with vendors for library equipment, supplies, subscriptions and services providing significant annual savings for libraries throughout Wisconsin.
- Coordinated project management for the Wisconsin Public Library Consortium; managed a million-dollar digital book buying budget; led multiple committees; developed reports and made presentations; gathered and interpreted data.

Delivery Services Coordinator | South Central Library System • November 1996 – June 2013**Accomplishments**

- Provided high-quality service as demand grew by more than 100% over the course of 16 years doubling the size of the fleet and staff while also navigating the delivery operation through the recession and reduced budgets. This was achieved with the following service changes and innovations.
 - Designed and led the building of a new 15,000-square foot delivery facility to meet long-term service needs and increase operational productivity by consolidating service locations.
 - Continually evaluated the fleet program including developing an in-house vehicle maintenance and repair service that lowered expenses and improved service quality.
 - Researched, tested, and transitioned fleet to new fuel-efficient vehicles and constantly assessed and adjusted fuel purchasing plan to control fuel expenses through market volatility.
 - Designed a customized material-handling cart with a local manufacturer to allow for the maximum use of vehicle capacity resulting in the consolidation of delivery routes that greatly reduced total driver time and miles driven while increasing driver safety.
- Nationally recognized library delivery services leader including being a published writer and editor of *Moving Materials: Physical Delivery in Libraries*; American Library Association Publishing, 2010.

Responsibilities

- Statewide coordinator for a centralized library delivery service, connecting nearly 800 library locations in Wisconsin with direct service to more than 300 stops, transporting over 15 million items annually.
- Responsible for the development and program management of a \$2.4 million-dollar budget; developed service pricing models and cost-sharing formulas for collaborative services; negotiated and maintained service agreements with 115 libraries and library organizations.
- Managed a centralized fleet of 24 trucks; developed long-range purchasing, utilization, and surplus plans; determined vehicle, equipment, and supply purchasing specifications; negotiated and strategized with vendors; set criteria for fleet maintenance program.
- Supervised a team of 28.5 FTE (40-45 employees); directed hiring processes; developed and coordinated employee skill and career development; created and administered organizational and departmental employee policies; prepared annual performance evaluations and set goals for all staff.
- Developed and managed safety program; performed occupational hazard assessments; established protocols for handling of hazardous waste; partnered with insurance and safety professionals to develop and utilize liability risk management tools and strategies.
- Employed data collection strategies and analysis to assess and improve operational functions.

Technical Skills

- MS Office Suite – Advanced in Excel
- Data visualization software – Tableau
- Customer Relations Management software – Sugar
- Project management tools – Smartsheet
- Google applications and other productivity and communication tools

Education

Madison Area Technical College: Microsoft Office Coursework

Lakeland College: Management Information Systems Program

University of Wisconsin – Madison: College of Letters and Science Undergraduate Studies

Melissa A. McLimans

Employment History

WiLS, Madison WI

Community Liaison / Service Specialist:

11/16/2015-present

Develop, manage and evaluate new projects, partnerships, and services to benefit WiLS and its members.

- Respond to member and partner requests for information and assistance
- Meet with members, partners and consortia to gain a better understanding of community needs, and translate this understanding into a vision of how WiLS may be able to deliver services to meet their needs
- Participate in community events, including statewide and regional conferences
- Identify opportunities for new partnerships, projects and services by talking with members, interacting with member groups, keeping up with developments in the field and working with other consortia vendors, etc.
- Assess viability, collaborative potential, and need for projects with appropriate member groups and other WiLS staff
- Develop project plans for possible new initiatives, including budget, scope, and assessment measures
- Create and edit content for communication channels
- Gather and interpret data (surveys, focus groups, presentation of data)
- Create and manage strategic planning processes for members and clients, including administering community surveys, leading focus groups, facilitating planning meetings and writing the final plan
- Create documentation for WiLS staff and members, particularly for process related to strategic planning, other consulting work, and digitization

University of Wisconsin Digital Collections Center, Madison

WI

Digital Library Services Manager:

08/01/2013-11/01/2015

Manage staff, resources and projects to digitize, for access and preservation, materials that support teaching and research

- Manage metadata, reformatting and web site production work
- Supervise academic, university, and student staff
- Facilitate weekly production group meetings, create production-related documentation to clarify project workflow, and monitor the production process
- Participate in consultation and grant-writing assistance for university and library staff pursuing outside funding for digitization projects as assigned
- Manage large-scale, outsourced, and/or grant-funded projects
- Develop budgets for student assistants and allocate students as needed to support library priorities
- Develop, implement and oversee digitization processes related to preservation of library and archival materials
- Coordinate and/or develop project assessments, cost and time estimates, briefs, and Memorandum of Understanding for the library's digital collections
- Serve as a resource to librarians and library units interested in exploring the development of digital collections as part of their preservation and/or access strategies
- Collaborate with university faculty to develop digital library resources in support of their teaching and research needs

- Participate in the development and planning of policy and new initiatives aimed at enhancing digital library collections and digital preservation reformatting practices
- Evaluate, plan, and implement workflow processes and structures to meet expanding needs of digital collections, especially as they pertain to preservation reformatting and production.
- Coordinate and implement marketing to promote UWDC resources, tools, and services to campus and external audiences
- Act as the main voice for marketing and outreach, including social media accounts and website
- Present to staff, students, and community members on the resources found in UWDC as well our practices
- Field all reference questions related to UWDC

Digital Services Librarian:

09/01/2006-07/31/2013

- Collaborate with faculty, staff and students throughout UW System to develop and complete digitization projects
- Assess materials for inclusion in digital collections, create cost estimates and project documentation, and maintain a project management database as part of project development work. Inventory, store and return all project materials
- Supervise student workers, library school practicum students and ISIP (Information Services Internship Program) participants and production workflow
- Provide reference service for UW Digital Collections content

Wisconsin Historical Society, Madison WI

10/2002-08/2006

Document Delivery Librarian: Managed the Wisconsin Genealogical Research Service, which includes the Wisconsin Pre-1907 Vital Records Index, the Wisconsin Name Index database, and the Civil War Service Records Research Service

- Managed orders, financial records, customer correspondence, and online database content
- Marketed services to past customers, newspapers, and genealogical groups by crafting marketing emails, information packets, and press releases
- Supervised two genealogical researchers

Digital Services/Research Assistant: Reviewed and indexed first person travel narratives for the *American Journeys* project

- Edited background files for roughly one-third of the 181 works
- Read primary documents, applied subject metadata and used content management software (CONTENTdm) to index digital content for *Turning Points in Wisconsin History*
- Researched other digital collections to add to *Turning Points*, enhancing the collection's usefulness as a portal to Wisconsin history
- Edited and contributed entries to *This Day in Wisconsin History*, a home page feature on the Society website, syndicated content that appears on the sites of more than 300 newspapers, media outlets, schools, and bloggers and was visited about 4,000 times a day
- Scanned original documents, converted and edited digital files and supervised others performing the same tasks

Education

- Master's Degree in Library and Information Studies, University of Wisconsin, Madison—May 2006
- Bachelors of Arts Degree in English, University of Wisconsin, Madison—August 1998

Publications

- "Digital Collections Celebrate the Wisconsin Idea." UW-Madison Libraries Magazine. Fall 2015.
- "Diaries of Discovery: Rare Books Document Indigenous Population of Japan." *Microform & Digitization Review*, Vol. 41, pp. 87–91, June 2012.
- "Preserving the Past and Increasing Access through Digitization." *Federal Depository Library Program (FDLP) Connections*. April 4, 2012.
- "Digital Collections Document Archeological Sites and Landscape History." *Friends of the Libraries Magazine*. Spring 2010.
- "Diaries of Discovery: Rare Books Document Indigenous Population of Japan." *Friends of the Libraries Magazine*. Summer 2010.
- "What's Cooking? Recipes for Success at the UW Digital Collections." *Friends of the Libraries Magazine*. Spring 2009.
- "Featured Collection-University of Wisconsin Digital Collections." *D-Lib Magazine*. Volume 13 Number 3/4, March/April 2007.
<http://www.dlib.org/dlib/march07/03featured-collection.html>.

Select Presentations

- *The State of (Wisconsin) Digital Preservation* (2016), moderator. Wisconsin Association of Academic Libraries annual conference in Elkhart Lake, Wisconsin.
- *It's Not Just About the Money: Creating and Sustaining a Positive Work Culture*
 - 2017, WiscNet Connections, Madison, Wisconsin
 - 2016, Wisconsin Association of Academic Libraries annual conference in Elkhart Lake, Wisconsin
 - 2015, Wisconsin Library Association annual conference in Milwaukee, Wisconsin.
- *What's on your mind? A Social Media Workshop* (2015) WILSWorld 2015, Madison, Wisconsin.
- *Success and Challenges of Using Social Media to Promote Digital Collections* (2013) Featured speaker at UW-Madison SLIS Social Media in Libraries short course.
- *Digitization 101* (2012) Session presented at Council of UW Libraries summer conference in Madison, Wisconsin.
- *Using Social Media* (2012) GLS Staff Development Program.
- *From Concept to Reality: An overview of the University of Wisconsin Digital Collections* (2011). Keynote speech at the South Central Library Systems annual Multi-type Summit in Madison, Wisconsin.
- *The Changing Landscapes of Wisconsin: A Digital Archive of Historic Aerial Photographs* (2010). Session presented at 2010 Wisconsin Association for Academic Libraries annual conference in Milwaukee, Wisconsin.
- *After the Honeymoon: Strategies for Success as a New/Emerging Librarian* (2009). Panel discussion at the Wisconsin Library Association annual conference in Appleton, Wisconsin.
- *Web 2.0 and Our Digital Collections* (2009). Roundtable discussion at the annual Council of University Libraries conference in Madison, Wisconsin.
- *Think Tank: Getting the Best Ideas from your Entire Group* (2009). Session presented at WLA-SSS Annual Professional Development Conference in Madison, Wisconsin.
- *Digital Content Meets Web 2.0* (2008). Session presented at the 2008 Upper Midwest

Contentdm User Group Meeting in St. Paul, Minnesota.

- *Using Digital Collections in the Classroom* (2007). Hands-on workshop presented as part of 2007 Teaching and Learning Symposium at the UW-Madison.
- *Using Digital Collections for K-12 Education* (2007). Training session presented at Wisconsin Educational Media Association annual conference in Madison, WLA in Green Bay, and WEAC teacher's conference in Milwaukee.

Honors and Awards

- 2015 UW-Madison General Library System Staff Service Award
- 2013 Featured as the September 5th "Know Your Madisonian" in Wisconsin State Journal, primarily for social media work at the University of Wisconsin Digital Collections
- 2011 Governor's Archives Awards for Archival Innovation; shared award with UW Department of Geography for *Changing Landscapes of Wisconsin*
- 2011 Twitter account (@UWDigiCollec) featured as part of the "In the Mix" section of the *May Madison Magazine*
- 2007 WeLead Protégé, awarded by Wisconsin Library Association
- 2006 Valmai Fenster Award for Outstanding Promise for Exceptional Scholarship in the Profession

Committee Membership and Other Activities

- Digital Public Library of America (DPLA) Service Hub Committee
- (2013-2015) UW Digital Collections Project Development and Assessment Committee, Chair
- (2013-2015) UW-Madison General Library System (GLS) Social Media Marketing Committee, Co-Chair
- (2013-2015) UW-Madison Campus Library Marketing Committee, Co-Chair
- (2010-2015) New Library Catalog Development and Design Teams
- 2015 UW-Madison General Library System (GLS) Digitization Grants Working Group
- 2015 UW-Madison General Library System (GLS) Resource Management Redesign Advisory Group
- UW-Madison General Library System new employee mentor
- 2009, 2011, 2012 Wisconsin Historical Society Book Award of Merit Judge
- 2010 Wisconsin Library Association Conference Co-chair
- 2010 Go Big Read (UW-Madison common book project) Book Review Group