

**REQUEST FOR PROPOSALS  
OF  
A STRATEGIC PLANNING INITIATIVE  
FOR  
THE FREE LIBRARY OF PHILADELPHIA  
&  
THE FREE LIBRARY OF PHILADELPHIA FOUNDATION**

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Issued by:  
THE FREE LIBRARY OF PHILADELPHIA FOUNDATION

**All proposals must be submitted electronically and sent to  
[ourfuturetogether@freelibrary.org](mailto:ourfuturetogether@freelibrary.org).  
Applicants who have failed to file complete applications will not be  
considered for the contract.**

**Proposals must be received no later than 5:00 p.m. Philadelphia, PA, local  
time, on February 7, 2024.**

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***Virtual RFP Conference with Q&A via Zoom***

**Date:** January 10, 2024

**Time:** 1 PM to 3 PM

**Details:**

[https://freelibrary-org.zoom.us/webinar/register/WN\\_LnLqABcaRSikiKGHmW4O1w](https://freelibrary-org.zoom.us/webinar/register/WN_LnLqABcaRSikiKGHmW4O1w)

Registration will be open on January 2, 2024

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*Kelly Richards,*  
*President & Director*  
***The Free Library of Philadelphia & Free Library of Philadelphia  
Foundation***

*Monique Moore-Pryor,*  
*Executive Director*  
***The Free Library of Philadelphia Foundation***

## Table of Contents

<b>I.</b>	<b>Statement of Purpose</b> .....	3
<b>II.</b>	<b>Institutional Overview</b> .....	3
<b>III.</b>	<b>Program Background</b> .....	4
<b>IV.</b>	<b>General Disclaimer of the Free Library of Philadelphia Foundation</b> .....	5
<b>V.</b>	<b>Scope of Work</b> .....	5
<b>VI.</b>	<b>Services and Tangible Deliverables</b> .....	5
<b>VII.</b>	<b>Milestones</b> .....	7
<b>VIII.</b>	<b>Budget</b> .....	8
<b>IX.</b>	<b>Hours, Location of Work, and Modality</b> .....	8
<b>X.</b>	<b>Monitoring/Security</b> .....	8
<b>XI.</b>	<b>Reporting Requirements</b> .....	9
<b>XII.</b>	<b>Insurance Requirements</b> .....	9
<b>XIII.</b>	<b>Minimum Submission Requirements</b> .....	9
<b>XIV.</b>	<b>RFP Timetable - Proposal Review and Selection Process</b> .....	10
<b>XV.</b>	<b>Submission Deadlines</b> .....	10

## **I. Statement of Purpose**

The Free Library of Philadelphia (FLP) and the Free Library of Philadelphia Foundation (FLPF) require a qualified professional firm and/or individual service providers to co-create an innovative, adaptable, measurable, evidence-based, and impactful strategic planning program that will guide these entities to their next iteration. This program aims to foster transparency, accountability, and active participation. Ultimately, the program will aim to capture the voices of existing and potential users of the public library who are experiencing some barrier (s) to service.

Please note: FLP and FLPF aim for this to be an inclusive and representative process. The expectation is that the vendor/consultants/service providers will be reflective of Philadelphia's diversity. As such, we will consider proposals that will cover one or more components of the strategic planning program requirements/deliverables.

## **II. Institutional Overview**

The mission of the Free Library of Philadelphia (FLP) is to advance literacy, guide learning, and inspire curiosity. Its vision is to build an enlightened community devoted to lifelong learning. The Free Library was established in 1891 as a "general library which shall be free to all." With 54 locations and the Rosenbach, the Free Library is among the city's most widely used educational and cultural institutions and fulfills its mission by offering access to digital and physical materials; over 30,000 yearly programs and services; free public computers and extensive Wi-Fi, including neighborhood Hotspots; and rich special collections.

The Free Library of Philadelphia is one of the most important civic, educational, and cultural organizations in the city of Philadelphia—a free, democratic institution, open to all, and with a presence in nearly every zip code. With 793<sup>1</sup> employees utilizing a roughly \$70 million operating budget, FLP delivers 30,000+ programs and other public library services to the incredibly diverse communities of 1.5 million Philadelphians. As one of the few public institutions with strong place-based interventionist potential, FLP's impact is most apparent in areas that experience the effects of social, racial, and economic inequality.

FLP, like many Philadelphia institutions, emerged from the pandemic with some discouragements but resilient. The pandemic laid bare structural weaknesses within the FLP system, including inequality of opportunity among staff; lack of sufficient staff capacity in response to previous austerity measures; low morale, and profound frontline staff trauma. In its capacity as a trusted institution and public space, FLP continues to encounter and serve as the institutional experiential frontline for the major societal issues gripping the city: epidemics of gun violence, low unemployment, and crumbling city infrastructure.

With an estimated \$40 million endowment, Free Library of Philadelphia Foundation (FLPF) is the non-profit foundation arm of the FLP, supporting FLP's efforts by raising contributed revenue, establishing corporate and other nonprofit partnerships, and advocating for FLP programs, resources, and facilities. The Foundation's asset portfolio contains about 400,000 items at the

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<sup>1</sup> As per end of Q1 FY24 HR Board Report

Rosenbach Museum & Library and also collaboratively stewards the FLP's special collections containing over 1 million items covering books and manuscripts, artifacts, prints and pictures, maps, music scores and recordings, fine/decorative arts, etc.

FLP and FLPF have been operating without a strategic plan since 2020 and have not undertaken a full strategic planning process in over a decade. In that time, the needs of the public, the roles of libraries, program and service delivery methods, and the world evolved radically. Moreover, the two organizations have been deeply intertwined over the past decade, leading to internal and external confusion about the roles and responsibilities of each organization. A more clearly defined operating relationship is needed, with both entities united around a mission, but with clear and delineated operational interdependency.

### **III. Program Background**

A new strategic plan for both FLP and FLPF are essential for the organizations and for the city they serve. This requires a holistic effort that seeks to address the intersecting issues that preceded the pandemic, with a process that is trauma-informed, grounded in Diversity, Equity, & Inclusion (DEI) principles, and responsive to present and future community needs.

In concert with new strategic plans, FLP and FLPF require new business plans that will define the relationship between the two organizations moving forward, unified around mission but with separate operations. These business plans must outline the relationship between these two entities, unify the organizations around the same mission, and disentangle them operationally. As many U.S. public library systems operate in tandem with separate foundations, the best practices that arise from the business planning process that creates greater operational independence between FLP and FLPF will be shared as a benefit to the broader public library field.

Moreover, both organizations require comprehensive DEI plans that will undergird the strategic and business plans and build on the DEI work already underway at FLP. While the new strategic and business plans will be grounded themselves in DEI principles, comprehensive DEI plans that encompass the current work led by FLP's Chief Diversity and Inclusion Officer, the two new strategic plans, and the FLP and FLPF business plans, are essential to ensuring DEI is not just one goal unto itself but is a guiding philosophy and operationalized for both organizations.

Broadly, the strategic planning program also provides FLP and FLPF with the opportunity to assess the cause(s) of decreased public engagement in city wide cultural institutions post- pandemic. The FLP strategic planning program will be guided by these questions:

- How has the pandemic changed public engagement patterns?
- While being supported by a dedicated nonprofit institution, what organizational, business, and service structure is needed to create a vibrant and responsive public library system?

The Free Library of Philadelphia Foundation's strategic planning initiative, as a separate entity, will have portions of its planning connected to FLP's strategic plan. It will be guided by these questions:

- What organizational, business, and revenue structures/governance is needed to create a sustainable and innovative Foundation?

- How can the Foundation foster effective collaboration across its portfolio (i.e. FLP to the Rosenbach Museum & Library)?

#### **IV. General Disclaimer of the Free Library of Philadelphia Foundation**

This RFP does not commit the Free Library of Philadelphia Foundation to award a contract. This RFP and the process it describes are proprietary to FLPF and are for the sole and exclusive benefit of FLPF. No other party, including any Applicant, is intended to be granted any rights hereunder. Any response, including written documents and verbal communication, by any Applicant to this RFP, shall become the property of FLPF and may be subject to public disclosure by FLPF, or any authorized agent of FLPF.

#### **V. Scope of Work**

The three-year initiative will encompass six overlapping and connecting pieces of work:

- research on post pandemic engagement patterns,
- strategic plan development for both FLP and FLPF,
- business plan development for both entities,
- comprehensive DEI plan development,
- a rebranding public relations campaign,
- implementation and post-execution analysis of all plans.

The consultant(s) will support, provide insight and deliverables to an established program working group led by the Senior Director of Strategy and Impact. This scope of work will need to be completed for both entities: the Free Library of Philadelphia and the Free Library of Philadelphia Foundation.

- i. Environmental Analysis
  - a. The consultant will conduct internal and external research and assessment of the current organizational, “user”, and market research for FLP and FLPF.
  - b. The consultant will conduct research to assess how public engagement patterns have changed with and within the public library system.
- ii. Community Engagement
  - a. The consultant(s) will plan, conduct, and manage stakeholder engagement and capture in the form of user surveys, planning committee engagement, and stakeholder interviews. There is an expectation that the consultant and/or individual service providers will make direct contact with the public in person, virtually, and/or in survey administering capacities.
- iii. Plan Development
  - a. The consultant will be responsible for the collation of data, information, and construction for the formation of the strategic, DEI, and communications plans.
- iv. Strategy Selection
  - a. The consultant(s) will provide business plans that are supportive of each entity’s strategic plan, including a forecasting and achievability analysis of options.
- v. Implementation
  - a. The consultant will provide an implementation plan that will operationalize the business and strategic planning goals and objectives.

#### **VI. Services and Tangible Deliverables**

FLPF and FLP require at a minimum, the services and tangible deliverables listed below. Applicants may propose additional or revised services and deliverables with an explanation as to how they are an effective means to achieve the program’s objectives.

**Services**

FLPF and FLP require the services listed below. The applicant's proposed scope of work should outline the execution of each task, referencing the personnel/job titles responsible for task completion. For each specified service, the applicant should suggest criteria to ascertain the satisfactory completion of the service tasks. While applicants can suggest additional or revised tasks and activities, please provide reasoning for how each contributes to achieving the project's objectives.

Engagement	Regular meetings with the Program Working Group and the Senior Director of Strategy & Impact
	Stakeholder Engagement, Identification, and Management– lead, manage, and report output from interviews, focus groups, strategic planning committee facilitation, and employees.
Analysis	Assessing the causes of decreased post-pandemic engagement patterns with the library as a city-wide cultural institution.
	Conduct an environmental scan to identify the key demographic, psychographic, economic, social, technological, and other trends that impact FLP’s service delivery.
	Conduct a business and service model analysis with recommendations on organizational structure, board governance, and service delivery model.
	Conduct a post-implementation assessment with recommendations for adjustments and further growth opportunities.

**Tangible Work Products**

FLPF and FLP seek the fulfillment and submission of the tangible deliverables outlined below. The proposed plan of action should provide detail on how the Applicant will be able to meet the requirements of each deliverable, identifying the personnel or job titles responsible for the deliverables. Additionally, the Applicant should suggest criteria to measure the satisfactory completion and delivery of each deliverable. While applicants can propose additional or revised tangible deliverables, a rationale for how these additions or revisions contribute to accomplishing the program’s goals should be included.

Deliverable	Broad Description	FLP Deliverable Due Date	FLPF Deliverable Due Date
Research report and findings	Provide a research report exploring post pandemic engagement patterns of Philadelphians.	August 2024	
DEI Plan	Co-create a plan that provides definitive steps and recommendations on how to ensure that DEI is woven	July 2024	September 2024

	throughout the Library's engagement and ecosystem.		
Business Plan	Develop a business plan that will include recommendations for business structure, process improvement, and service model innovation.	September 2024	October 2024
Strategic Plan	A 3-to-10-year strategic plan that captures the goals and objectives gleaned from active and representative stakeholder engagement.	February 2025	May 2025
Rebranding/Marketing Communications Plan	Co-create and generate an extensive public rebranding campaign	June 2025	July 2025
Implementation Plan	Draft a plan that operationalizes the strategic planning goals supported by new organizational, business, and services models.	June 2025	July 2025
Post Implementation Analysis	Generate a report detailing the current state and post all of the implemented changes.	May 2026	April 2026

## VII. Milestones

The strategic planning initiative has been conceived to entail four phases which align with the deliverables' due dates in the Tangible Work products sections. The phasing and pacing of the FLP and FLFP strategic planning initiatives are the following:

	<b>Sample Potential Consultant(s) Activities</b>	<b>FLP Estimated Completion Date</b>	<b>FLPF Estimated Completion Date</b>
Phase 1 – Assemblage/ Environmental Analysis	<ul style="list-style-type: none"> <li>• Creation of communication &amp; marketing strategy for the strategic plans.</li> <li>• stakeholder mapping</li> <li>• stakeholder participation finalization</li> </ul>	March 2024	April 2024
Phase 2 – Engagement	<ul style="list-style-type: none"> <li>• Develop and implement community engagement strategy.</li> </ul>	September 2024	November 2024

	<ul style="list-style-type: none"> <li>• DEI plan development</li> <li>• Business Plan Development</li> <li>• Facilitation of planning committees, user/focus groups, and market information gathering</li> <li>• Completion of Research Project exploring post pandemic engagement patterns with the library.</li> </ul>		
Phase 3- Strategic Plan	<ul style="list-style-type: none"> <li>• Develop rebranding campaigns.</li> <li>• Develop strategic plans</li> </ul>	June 2025	September 2025
Phase 4- Implementation	<ul style="list-style-type: none"> <li>• Develop an implementation plan which operationalizes the output from the strategic, business, DEI, and research findings.</li> <li>• Leading the execution of the marketing and rebranding campaigns</li> <li>• Leading the execution of the DEI plan</li> <li>• Leading the execution of the business plan</li> </ul>	July 2025	August 2025
Phase 5 – “Are we there yet?”/Post Implementation Assessment	<ul style="list-style-type: none"> <li>• Generate post implementation assessment.</li> <li>• Refine Implementation Plans according to results of assessment.</li> </ul>	May 2026	June 2026

**VIII. Budget**

We prefer potential consultants to provide their own estimates. Please see minimum submission requirements for additional detail.

**IX. Hours, Location of Work, and Modality**

Project meetings will happen during a Monday to Friday 9 AM to 5 PM schedule on a hybrid modality, depending on the activity, of digital and in person activities. In some cases, depending on the proposals, there will be a need to facilitate evening committees or user/focus group interviews.

**X. Monitoring/Security**

By submission of a proposal in response to this RFP, the Applicant agrees to all contract monitoring and evaluation activities undertaken by the Free Library of Philadelphia Foundation and the Free Library of Philadelphia.



## **XI. Reporting Requirements**

The successful Applicant(s) shall report the status of the project and progress on providing the contracted services and products to the Senior Director of Strategy & Impact for the Free Library of Philadelphia Foundation and/or designated internal working group each week. Applicants must submit an invoice upon the completion of each milestone. This invoice must include the services provided, the tasks accomplished, and associated costs incurred. If hourly rates are charged, the invoice must also detail the number of hours, the hourly rate, and the individual who performed the service.

## **XII. Insurance Requirements**

Client (FLPF) shall not provide insurance coverage of any kind for Contractor or Contractor's employees or contract personnel. Contractor shall obtain the following insurance coverage and maintain it during the entire term of this Agreement:

Comprehensive or commercial general liability insurance coverage in the minimum amount of \$1,000,000 combined single limit, including coverage for bodily injury, personal injury, broad form property damage, contractual liability, and cross-liability.

General Liability Each Occurrence \$ 1,000,000

Claims Made X Occur Med Exp (Any One Person) \$ 5,000

General Aggregate \$ 2,000,000

Gen'l Aggregate Limit Applies Per: Products - Comp/Op Agg \$ 2,000,000

Before commencing any work, Contractor shall provide Client with proof of this insurance and with proof that Client has been made an additional insured under the policies.

## **XIII. Minimum Submission Requirements**

FLP and FLPF would like to encourage a full complement of consultants and individual service providers with diverse capabilities and skills that would be able to provide effective and quality services for the activities associated with this RFP. Successful Applicant proposals should include at minimum the following: organization & personnel bio, scope of work description, cost proposal, and references. For individual service provider Applicants, please include a short statement on how DEI is incorporated into your work. For firms with more than three employees, please include your firm's DEI plan.

Further details of the requirements are below:

- ✓ **Applicant Bio:** Provide a statement of qualifications and capability to perform the services sought by this RFP, including a description of relevant experience with projects that are similar in nature, size, and scope to that which is the subject of this RFP. Please include work samples not to exceed more than 10 pages. The proposal must identify the applicant's qualifications by education level (if applicable), skill set (described in detail), experience level, and job title. Resumes of all personnel so identified should be included in Applicant's proposal. Experience with "like" projects should be cited. However, experience with public libraries as a subject matter is not required.

- ✓ **Scope of Work Description:** The scope of work proposed by Applicant should include a general project schedule that identifies all tasks, activities, deliverables, and milestones the Applicant proposes to carry out for the project and a time of completion (measured from project start date) for each. The Applicant should state the number of days following the Foundation’s authorization to proceed by which it will be ready to start the work, including any mobilization time. If the Applicant proposes a different overall time of performance, the reasons must be stated.
- ✓ **Cost Proposal:** Applicants must provide a detailed cost proposal, which must include 1) a line-item breakdown of the costs for specific services and work products proposed, and 2) a statement of staff hourly rates. The proposed price must include all costs that will be charged to the Foundation for the services and tangible work products the Applicant proposes to perform and deliver to complete the project. Any contract resulting from this RFP will provide for a not-to-exceed amount in the compensation section of the contract.
- ✓ **References:** Include contact information for a minimum of (2) references who can speak to the applicant’s or firm’s experience with similar types of work as that described in this RFP.

**XIV. RFP Timetable - Proposal Review and Selection Process**

Release of RFP and Solicitation Period Opens	January 2, 2024
Discussion hosted by FLPF on the RFP for prospective applicants	January 10, 2024
RFP Solicitation Period Closes	February 7, 2024
RFP Application Review Commences	February 8, 2024
Notification of First Round Applicants and Interviews	February 15, 2024 to February 23, 2024
Selection and Announcement	February 28, 2024

Applicant(s) will be selected by a working group or committee comprised of FLP and FLPF senior leadership and other senior library stakeholders. Please note that this proposal is being released through the Free Library of Philadelphia Foundation and selected Applicant(s) will be contracted out of that nonprofit entity and not directly with FLP, which is a quasi-governmental city agency.

In terms of selection criteria, vendors will be selected on the basis of past work presented, references, community connections, creativity, and assessed capabilities demonstrated by their proposal.

**XV. Submission Deadlines**

Proposals and responses to this RFP must be emailed to [ourfuturetogether@freelibrary.org](mailto:ourfuturetogether@freelibrary.org) and [alegriagambrellq@freelibrary.org](mailto:alegriagambrellq@freelibrary.org) as a single PDF by **February 7, 2024 at 5:00 PM eastern standard time**. Additional content, such as videos or other media related to work samples can be included as a separate item in the electronic submission.

If Applicants are having accessibility related issues with their proposal and submission, please reach out via [ourfuturetogether@freelibrary.org](mailto:ourfuturetogether@freelibrary.org) or contact us at 215-686-5300 and we can work on other means of proposal submission.