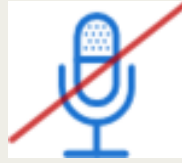


**Thank you for joining us today for the Free Library of Philadelphia & Foundation Strategic Planning Initiative RFP Discussion! Please note the following:**



All microphones, notifications/alerts, phones, and computers are muted.



Please enter your *Name, Organization*, and a *short intro* into the chat. Please remember to update your name in Zoom as well.



This webinar is being recorded for internal use only.

- If there are any connection or related items for this call, please send a DM to Shatea Timbers or email [ourfuturetogether@freelibrary.org](mailto:ourfuturetogether@freelibrary.org).

# Charting our Future Together: The Strategic Planning Initiative for The Free Library of Philadelphia & Free Library of Philadelphia Foundation

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## **RFP Discussion and Q&A**

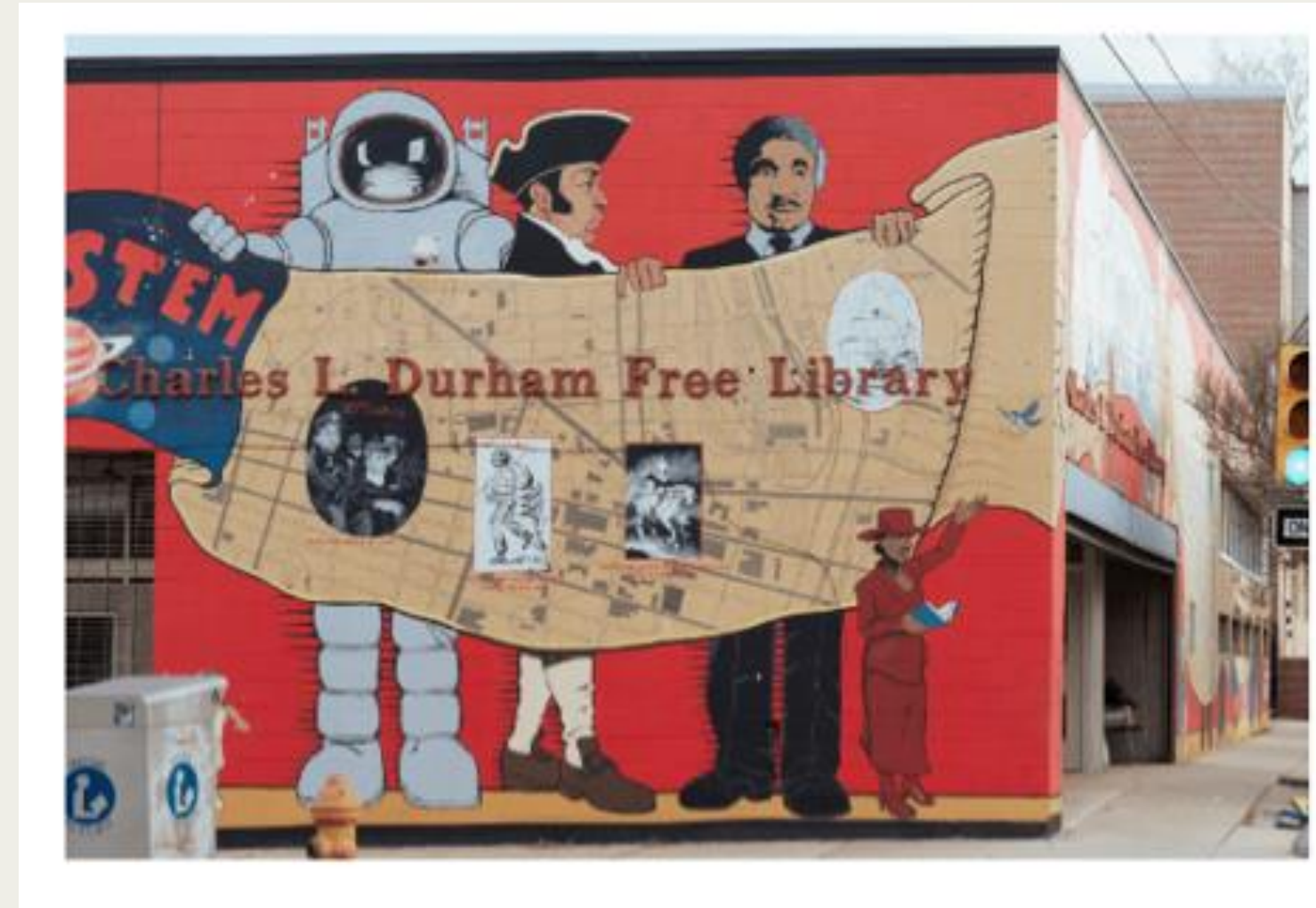
Quincy Alegría Gambrell  
Senior Director of Strategy & Impact  
January 10, 2024



# AGENDA

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- I. Discussion Guidelines & Reminders
- II. Welcome and Staff Introductions
- III. Snapshot of the Library and the Foundation
- IV. Mission, Guiding Principles, Goals, & Challenges
- V. RFP Deliverables & Services
- VI. Path Forward – Initiative Timeline
- VII. Strategic Plan Structure & Components
- VIII. Suggested Engagement & Collaboration Structures
- IX. RFP Submission Process & Tips
- X. RFP Timeline & Required Forms
- XI. Q & A



# DISCUSSION GUIDELINES & REMINDERS

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 All participant phones/microphones will be muted.

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 All questions should be typed in the chat box, and will be addressed at the end during the Q&A.

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# STAFF INTRODUCTIONS



Priscilla Suero  
First Deputy Director  
The Free Library of  
Philadelphia



Quincy Alegría Gambrell  
Senior Director of Strategy &  
Impact  
The Free Library of  
Philadelphia Foundation





*“The Free Library of Philadelphia’s mission is to advance literacy, guide learning, and inspire curiosity. Its vision is to build an enlightened community devoted to lifelong learning.”*

*“The Free Library of Philadelphia Foundation’s mission is to provide resources and advocacy to advance the mission of the Free Library of Philadelphia while stewarding and promoting our special collections for the benefit of all Philadelphians and beyond.”*



# SNAPSHOT OF THE LIBRARY & THE FOUNDATION



## FLP

- 54 branches with over an estimated 800,000 square footage of indoor publicly accessible space. Other library associated real estate assets include 3 other locations used for warehousing, distribution, and maintenance.
- Nearly 800 employees delivering 30,000+ programs yearly with 47% of Philadelphians being library cardholders.
- Over 3 million materials borrowed systemwide supported by a \$70 million Operating Budget

## FLPF

- Special Collections portfolio of over 400,000 items at the Rosenbach and co-steward over 1 million items at the Library.
- 200+ employees provides or manages over 120 yearly Author events, One Book One Philadelphia, Read by 4<sup>th</sup>, and federal funding related programming.
- Over \$46 million in assets.



# OBJECTIVES

## FLP

To produce an innovative, adaptable, measurable, and impactful 3 to 10 year strategic plan that will guide the Free Library of Philadelphia and Foundation to its next iteration, this program aims to foster transparency, accountability, accessibility, and be fully participatory.

It will be guided by these questions:

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

### Deliverables:

- ✓ Strategic Plan
  - ✓ Marketing/Communication Plan
  - ✓ Implementation Plan
- ✓ DEI Plan
- ✓ Business Plan
- ✓ Report on Post-Pandemic Engagement Patterns
- ✓ Post-Implementation Assessment

## FLPF

To produce a 3 to 10 year strategic plan that will guide the Free Library of Philadelphia Foundation to its next iteration, this program aims to foster cooperation, collaboration, and be actively participatory.

It will be guided by these questions:

- What organizational, business, and governance structures are needed to create a sustainable and innovative Foundation?
- How can the Foundation foster collaboration across its portfolio (i.e. the Library to the Rosenbach)?

### Deliverables:

- ✓ Strategic Plan
  - ✓ Marketing/Communication Plan
  - ✓ Implementation Plan
- ✓ DEI Plan
- ✓ Business Plan
- ✓ Post-Implementation Assessment



# GUIDING PRINCIPLES, GOALS, & CHALLENGES

The strategic planning program will be co-created using the following principles and goals:



# RFP DELIVERABLES & SERVICES



Deliverable	Broad Description	Associated Services	FLP Deliverable Due Date	FLPF Deliverable Due Date
Research report and findings	Provide a research report exploring post pandemic engagement patterns of Philadelphians.	Assessing the causes of decreased post-pandemic engagement patterns with the library as a city-wide cultural institution.	August 2024	
DEI Plan	Co-create a plan that provides definitive steps and recommendations on how to ensure that DEI is woven throughout the Library's engagement and ecosystem.		July 2024	September 2024
Business Plan	Develop a business plan that will include recommendations for business structure, process improvement, and service model innovation.	Conduct a business and service model analysis with recommendations on organizational structure, board governance, and service delivery model.	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.	<ul style="list-style-type: none"> <li>Conduct an environmental scan to identify the key demographic, psychographic, economic, social, technological, and other trends that impact FLP's service delivery.</li> <li>Stakeholder Engagement, Identification, and Management– lead, manage, and report output from interviews, focus groups, strategic planning committee facilitation, and employees.</li> </ul>	February 2025	May 2025
Rebranding/Marketing Communications Plan	Co-create and generate an extensive public rebranding campaign	<ul style="list-style-type: none"> <li>Logo and Visual Footprint Redesign</li> <li>Media Engagement and Strategy</li> </ul>	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.	Conduct a post-implementation assessment with recommendations for adjustments and further growth opportunities	April 2026	May 2026

# PATH FORWARD - TIMELINE OVERVIEW

## FLPF

### *Assemblage*

Phase 1  
**Oct'23 – Mar '24**

- Current State Assessment
- RFP Generation
- Vendor Selection
- Stakeholder Mapping

### *Engagement*

Phase 2  
**Mar '24- Oct '24**

- DEI, Communication/Marketing plan, and Stakeholder Engagement Kick off
- Committee/Focus Group Formation

### *Strategic Plan*

Phase 3  
**Nov'24 – Aug '25**

- Strategic Plan Development, Completion, and Adoption.
- Committee synthesizes Focus Group recommendations and forms goals.

### *Implementation*

Phase 4  
**Sept'25-July '26**

- Socialization of plan with branding/marketing campaign.
- Implement DEI and business plan .

### *“Are we there yet?”*

Phase 5  
**July '26 -**

- Ongoing evaluation of process and organization. Review of employee and user/non-user feedback mechanisms and systems. Review of targeted distal planning goals..

## FLP

### *Assemblage*

Phase 1  
**Oct'23 – Feb '24**

- Current State Assessment
- RFP Generation
- Vendor Selection
- Stakeholder Mapping

### *Engagement*

Phase 2  
**Nov'23 - Sep '24**

- Plan development kicks off for DEI and Communication/Marketing plan, Stakeholder Engagement Kick off
- Committee Formation

### *Strategic Plan*

Phase 3  
**Oct'24 – Jul '25**

- The creation and reporting phase. Report research findings. Committees synthesizes the findings and make recommendations.
- Strategic Plan Development, Completion, and Adoption.

### *Implementation*

Phase 4  
**Aug'25-Jun '26**

- Socialization of plan with branding/marketing campaign.
- Implement DEI and business plan .

### *“Are we there yet?”*

Phase 5  
**Jun '26 -**

- Ongoing evaluation of process and organization. Review of employee and user/non-user feedback mechanisms and systems. Review of targeted distal planning goals..

# STRATEGIC PLAN STRUCTURE & COMPONENTS

- User-Market Analysis
- Post Pandemic Engagement Report

## Environmental Analysis

- Internal FLPF and FLP analysis
- External Peer Foundation analysis

- Ongoing Evaluation and Planning
- Implementation Execution Plan

## Implementation

- Planning Committee (s) Formation
- Stakeholder Survey/s/Feedback
- Plan Socialization
- Communication and Branding
- DEI Plan
- Marketing Plan

## Community Engagement

## Strategic Plan

- Goal Formation
- Feedback Integration
- Presentation of Findings

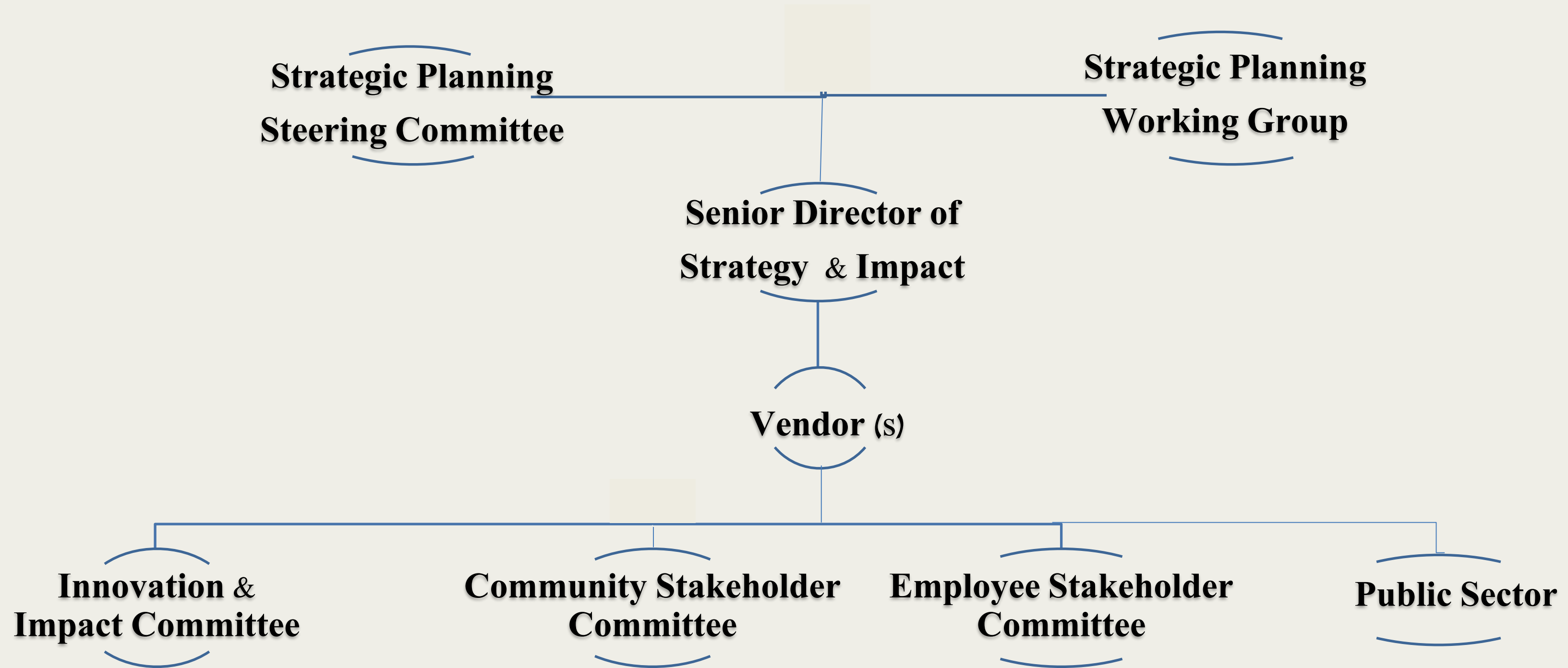
## Plan Development

## Strategy Selection

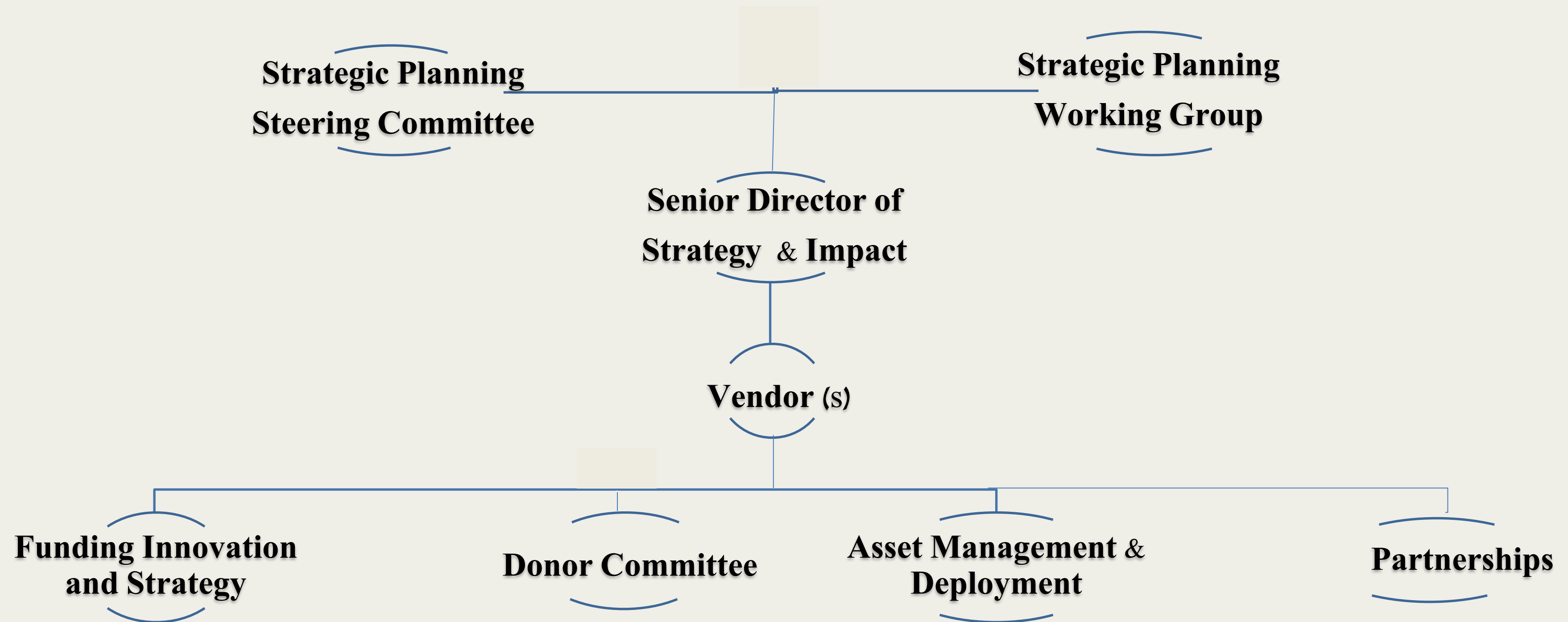
- Strategic and Communications Plan
- Achievability Analysis
- Forecasting Analysis
- Business Plan

# FLP STRUCTURE - ENGAGEMENT & COLLABORATION

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# FLPF STRUCTURE - ENGAGEMENT & COLLABORATION



# FLP STRUCTURE - SUGGESTED COMMITTEE & GROUP OVERVIEW

<p><u>Committee</u></p>	<p>Steering</p>	<p>Working Group</p>	<p>Impact &amp; Innovation</p>	<p>Community</p>	<p>Employee</p>	<p>Public Sector</p>
<p>Description</p>	<p>Main strategic planning committee</p>	<p>A forum for the SD of Strategy &amp; Impact and FLP Leadership to digest and process new developments or information.</p>	<p>Tasked with recommending innovative approaches to FLP's service delivery models.</p>	<p>Users and potential users of public library services</p>	<p>FLP employee main committee</p>	<p>Tasked with advising on strategic partnerships between FLP and other public sector organizations.</p>
<p>Selection Criteria</p>	<p>Nominated</p>	<p>N/A</p>	<p>Not directly involved in public library services</p>	<p>Users and non-users of the public library, cross income residents of Philadelphia.</p>	<p>Employees and/or contractors</p>	<p>City, State, and Federal agencies that are involved in funding FLP.</p>
<p>Stakeholders Captured</p>	<p>FLP Leadership, Trustees/Board Members, FLP ED, Community Leaders, City Agency, Representative from Other Committees, the major universities.</p>	<p>SD of Strategy &amp; Impact, President, First Deputy Director, &amp; ED of FLPF</p>	<p>Local Academics, Researchers, Community Leaders, Businessmen, Technologists, and Library Service Providers.</p>	<p>Community organizations, Individuals, Local Business leaders, Marginalized voices</p>	<p>Multilevel employee voices</p>	<p>City, State, and Federal agencies, emphasis will be on local and then expand to state and federal.</p>

# FLPF STRUCTURE - SUGGESTED COMMITTEE & GROUP OVERVIEW



Committee	Steering	Funding Innovation & Strategy	Major Donor	Asset Management & Activation	Partnerships	Employee
Description	Main strategic planning committee	Tasked with recommending innovative approaches to fundraising and revenue generation	Representing the interests of historic major donors to FPLF.	Tasked with examining FLPF's assets and generating a management/deployment strategy	Focus Group tasked with advising on strategic partnerships between FLPF and public, private, and non-profit potential partners.	FLPF main employee focus group
Selection Criteria	Nominated	Not directly involved in Foundation core activities	Individual Major donors or affiliated entities who have given substantially over 5 years to FLPF.	Executive Leadership and Subject Matter Experts	Representatives from non-profit, city, state, and federal agencies, and corporations.	Employees and/or long affiliated contractors
Stakeholders Captured	FLPF Leadership, Trustees/Board Members, FLPF ED, Community Leaders, & Representatives from Other Committees	Local Academics, Researchers, etc.	HNW	FLPF Leadership, Affiliated partners.	Non-profit, public, and private stakeholders.	Multi-Level Employee Voices



# RFP PROCESS & SUBMISSION

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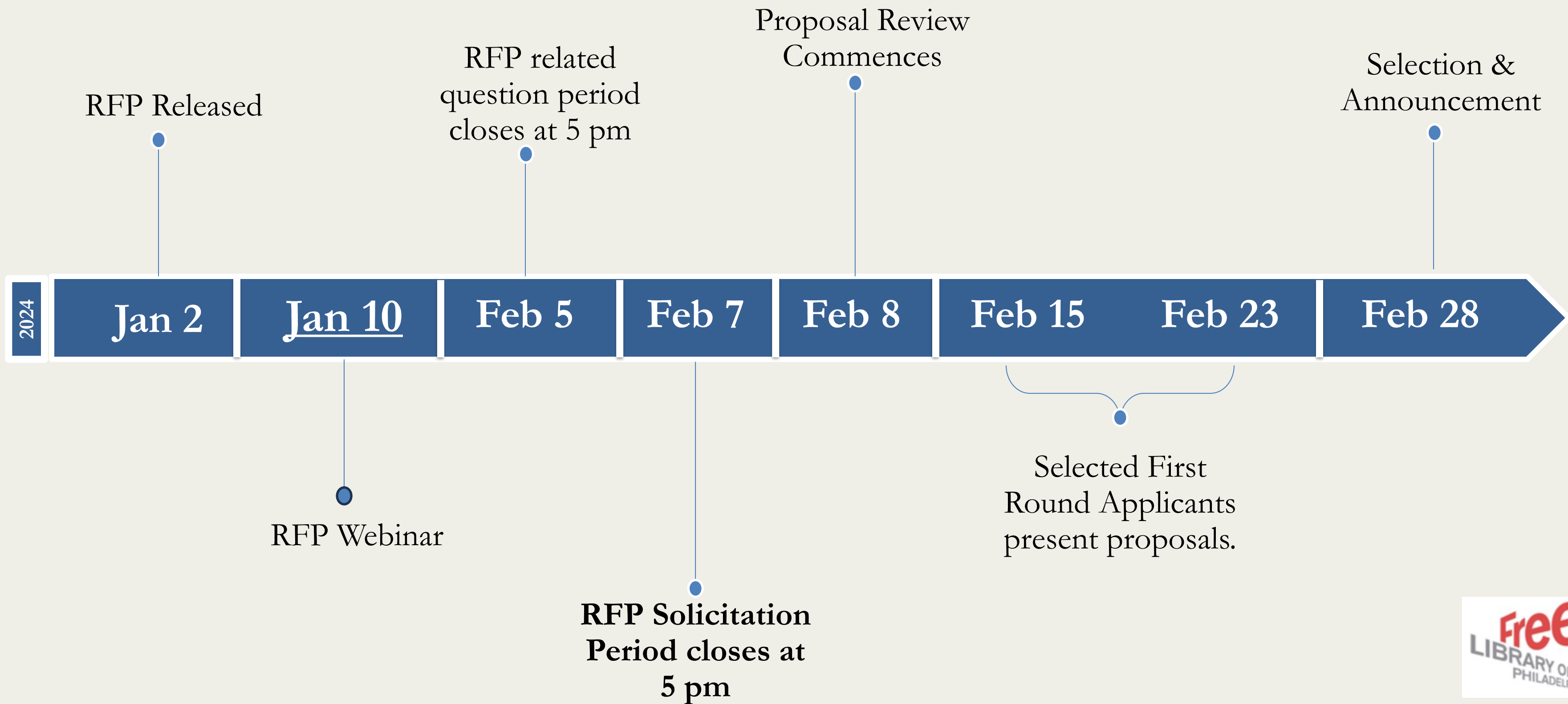
- Proposals must be received no later than 5:00 p.m. Philadelphia, PA, local time, on **February 7, 2024**. Please do not wait until last minute to submit!
- Please ensure to include all requested information in one submission.
- All questions concerning this RFP must be submitted via email to [ourfuturetogether@freelibrary.org](mailto:ourfuturetogether@freelibrary.org), no later than **February 5, 2024** at 5pm Philadelphia, PA local time. Any queries post this date may not be considered if not received by then.
- First Round Applicants will be required to present their proposal to the selection committee from **February 15, 2024 to February 23, 2024**.
- Announcements will be made on **February 28, 2024** with selected vendor (s) to be posted on [Charting our Future Together - Free Library](#).

# RFP REQUIRED DOCUMENTS

<p><b>Applicant Bio:</b></p>	<p>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.</p>
<p><b>Scope of Work Description:</b></p>	<p>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.</p>
<p><b>Cost Proposal:</b></p>	<p>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.</p>
<p><b>References:</b></p>	<p>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.</p>
<p><b>Proof of Insurance Coverage</b></p>	



# RFP TIMELINE



# Q & A SESSION

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**THANK YOU FOR YOUR TIME AND ATTENTION!**



**PLEASE DROP YOUR QUESTIONS IN THE CHAT**