

Boston Public Library

Part B: Specifications

BPL Strategic Plan: Project Manager/Consultant

The Boston Public Library (BPL) is seeking a full-service consultant to assist in developing the BPL’s new strategic plan in coordination with, and under the oversight and direction of Library Leadership & the Strategic Planning Committee of the BPL Board of Trustees (SPC).

The BPL last developed a formal strategic plan in 2011. An interim strategic “roadmap” was developed in 2019. This initiative will be a comprehensive strategic review to answer the fundamental question: “What should it mean for the BPL to be a leading 21st-century urban public library?” Our objective is to develop a strategic plan that is both ambitious and actionable and which will serve as a practical guide for Library Management, the BPL Board of Trustees, and the staff as a whole for years to come.

The development of a new strategic plan is a key priority of BPL Leadership and the BPL Board of Trustees, and the respondent that is selected for this engagement will be expected to work closely with representatives of BPL Leadership, the Board of Trustees and other key community stakeholders. Notwithstanding anything to the contrary herein, the BPL may elect to retain more than one advisor for this engagement in the event it is determined that a separate advisor may be appropriate for certain discrete items. (e.g., development and implementation of the Marketing Plan and Communications Playbook described below).

The BPL is America’s oldest urban public library, with its charter dating to 1848. It holds one of the three largest library collections in the United States. The BPL is a founding member of the Association of Research Libraries and is focused on what it means to be a public “research library” in society today. The BPL currently is comprised of a Central Library (itself comprised of two buildings dating to 1895 and 1972 as well as 25 neighborhood branches and an archival center. Services today focus on activities that include literary skills and the lending of books, both physical and online; reference, research, and information related services; a wide range of program offerings for all ages, as well as civic and social oriented services for the community. In addition to serving the City of Boston, the BPL is the “Library of the Commonwealth” for Massachusetts, as established in state statute. It receives funding from a variety of sources including: the City of Boston; the Commonwealth of Massachusetts; and private philanthropy, represented by The Boston Public Library Fund, the Associates of the Boston Public Library, the Leventhal Map and Education Center and a host of individual Friends groups. Under the direction of President David Leonard, it employs a total staff of approximately 500 and its annual budget is approximately \$ 52 Million.<sup>1</sup>

## Section 1: Project Scope and Rationale

The BPL has more recently conceptualized its services around the four pillars of public library service philosophy: (i) reading and literacy, (ii) space and community gathering, (iii) programs

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<sup>1</sup> Note to Draft: BPL staff to complete.

and services and (iv) cultural heritage. Today, there are typically over 6000 programs scheduled across the BPL's 26 locations (the BPL central library and the BPL's 25 branch libraries) in any given year. Understanding which new or existing services the BPL should prioritize and which services it should de-prioritize – as well as how to communicate the services the BPL chooses to prioritize in a way that is targeted and impactful (for users, staff and funders) – will be a critical part of developing a new strategic plan. Recognizing that the BPL is “one library”, but a library that respects the individuality and nuance of its 25 neighborhood branches will also be critical.

By a number of key metrics, the BPL is reaching many different people in many different ways. In 2022 alone:

- Over 2,170,000 people visited the BPL, with over 15,000 people attending in-person programs for children and over 19,000 people attending in-person programs for teens.
- Print circulation exceeded 660,000 and e-content circulation exceeded 3,800,000.
- Over 6,200 Chromebooks and 3,000 LTE-enabled home Wi-Fi routers were distributed through the BPL's long-term lending program.
- Over 7,500 people participated in ESL classes at the BPL.
- Over 100 small business legal consultations and 90 entrepreneur-in-residence consultations were hosted at the BPL.
- Over 11,500 people attended nearly 140 cultural programs at the BPL.

Yet, despite the offerings described above, many people still do not have a clear sense of what is on offer, what constitutes the modern library and how the BPL can enrich their lives.

The BPL Board of Trustees and the SPC believe that the BPL can play a singular role not only in providing access to knowledge and learning opportunities, but also in creating safe and inspiring spaces, offering impactful services and fostering civic discourse, during a time of great social isolation, when many people feel disconnected and alone and fewer and fewer public institutions are widely trusted. Determining how the BPL can make the greatest impact possible by leveraging its singular strengths will be of paramount importance to the strategic review. This too is against a backdrop of legacy historical collections, that must be added to, but can be leveraged for today's learning and building a better society in impactful ways.

## Section 2: Deliverables

The bidder selected for this engagement will be a full-service consultant that is capable of successfully undertaking the following deliverables.

- Community Survey: Develop and implement a comprehensive survey to gauge community perspectives on which BPL services (existing or proposed) are most impactful and differentiated.

- Staff Survey: Develop and implement a comprehensive survey to gauge staff perspectives on which BPL services (existing or proposed) are most impactful and differentiated. As part of such survey, identify how staff think they can be best supported and engaged given the demands they are facing (including with respect to social services), leveraging historical staff surveys and data.
- Focus Groups: Lead targeted focus groups with key stakeholders, including library staff, representative City of Boston leadership, and regular users of in-person and online library services, to gauge community perspectives on which BPL services (existing or proposed) are most impactful and differentiated.]<sup>2</sup>
- Landscape Review: Analyze best practices from other leading urban libraries with a focus on the offerings and communication strategies such institutions are utilizing successfully and in a differentiated way. Identify initiatives that other leading urban libraries are undertaking that the BPL might consider undertaking in a way that could be particularly impactful for the BPL. As part of this initiative, benchmark comparative funding (including foundation-related funding) and staffing levels.
- Strategic Plan: Develop a formal strategic plan in coordination with, and under the oversight and direction of BPL leadership and the SPC. As part of this process, take part in, and assist in facilitating, regular SPC meetings and discussions. The ultimate work product, which will be subject to approval by the BPL Board of Trustees, should include key benchmarks and milestones and be a document that can be disseminated widely to the public.
- Mission Statement: Help to review and potentially develop a new mission statement for the BPL based on the new strategic plan. For reference, as reflected on the BPL’s website, the BPL’s current mission statement is as follows:  
*[The Boston Public Library’s mission is to preserve and provide access to historical records of our society, and to serve the cultural, educational, and informational needs of the people of the City and the Commonwealth.]*
- Marketing Plan and Communications Playbook: Develop a communications plan in coordination with BPL staff and other advisors to ensure that the new strategic plan has the greatest resonance and impact possible.]<sup>3</sup>

### Section 3: Schedule

This project is expected to start in Summer 2023 and currently anticipated to be completed within [12 months].<sup>4</sup>

### Section 4: Competencies

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<sup>2</sup> Note to Draft: Inclusion of focus groups to be confirmed.

<sup>3</sup> Note to Draft: Inclusion of marketing and communications playbook to be confirmed, particularly in light of other BPL communications initiatives as may be underway.

<sup>4</sup> Note to Draft: Inclusion of focus groups to be confirmed.

- Full-service capabilities and a demonstrated track record of success in developing strategic plans for public institutions.
- Experience with innovative data sourcing, crowd sourcing and related IT applications (e.g., Basecamp).
- Demonstrated experience with complex project planning, scoping, budget setting, and cost tracking and ability to move quickly and provide real-time updates and analysis.
- Demonstrated commitment to principles of Equity, diversity and inclusion.
- Proven ability to work with a wide variety of stakeholders and provide appropriate information for varying audiences, both in writing and in person.
- Strong oral and written communication skills.
- Demonstrated ability to adapt to new or changing circumstances.
- Ability to work collaboratively and proactively with various advisory groups and levels of staff in a team environment.
- Careful and meticulous attention to detail.

## Section 5: Requirements

The proposal should address how the bidder intends to address the needs of the BPL concerning this project. Included in the proposal should be clearly marked sections identifying the following:

- Relevant Experience and Qualifications: A description of the bidder's relevant experience and qualifications. Please provide case studies of any relevant strategic plans undertaken for other public institutions.
- Proposed Team: A description of the proposed team that would lead the bidder's work. If subcontracting support is anticipated to be required, please include a description of the type of subcontracted work that will be required.
- [Mission Statement: Comment on what vision, if any, the bidder may have for the BPL's new mission statement. What about the current mission statement resonates? What ought to be changed?]<sup>5</sup>
- Implementation Plan: Confirmation that the overall schedule described above is workable from the bidder's perspective, and an overview of the benchmarks and milestones the bidder would use to execute against that schedule.
- Reporting Plans: Description of the frequency and types of reports the SPC can expect.
- Fee Analysis: A schedule of proposed fees and confirmation that in no event with the bidder's fees exceed the amount set forth in Section 7 below.
- Authorizations: Confirmation that no other authorizations are required to submit the proposal.

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<sup>5</sup> Note to Draft: Inclusion to be confirmed.

## Section 6: Consultant Selection Criteria

The consultant must meet a set of minimum evaluation criteria in order to be considered. An evaluation committee will review and rate the proposals submitted, then review pricing structures. Please see Section C for submission requirements.

## Section 7: Budget

Not to exceed [\$●].<sup>6</sup>

## Section 8: Definitions

BPL: Boston Public Library, a department of the City of Boston, seeking services outlined in this RFP.

RFP: This request for proposal.

SPC: The Strategic Planning Committee of the BPL Board of Trustees.

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<sup>6</sup> Note to Draft: Amount to be confirmed.