

Request for Proposal
California State Library
Five-Year State Plan
(2023-2027)

October 18, 2021

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Purpose

Per the Institute of Museum and Library Services (IMLS), each State Library is required to independently evaluate activities funded by IMLS prior to the end of the Five-Year Plan and provide a report of its findings to IMLS's Director. A plan for the next five years must be developed and submitted to IMLS by June 30, 2022. The evaluation of the current California State Library LSTA five-year program (2018- 2022) is in process and is scheduled to be completed by December 2021.

The Pacific Library Partnership (PLP) is seeking a skilled consultant with relevant library and/or strategic planning experience to develop a new California Five-Year State Plan for 2023-2027.

About Pacific Library Partnership

The Pacific Library Partnership is a cooperative library system that includes the eight counties in the San Francisco Bay Area. Information about PLP is available at <http://www.plpinfo.org/>.

The successful consultant will be hired through the Networking California Library Resources project, which is a project of the Pacific Library Partnership.

Scope of Work

Overview

The California State Library (State Library), the State Library Administrative Agency (SLAA) for California, administers the federal [Library Services and Technology Act \(LSTA\) state grant to California](#). The Institute of Museum and Library Services distributes LSTA funds to SLAAs through the Grants to States program. The State Library is required to develop a new Five-Year State Plan for 2023-2027 and submit the Plan to IMLS by June 30, 2022. The Pacific Library Partnership, in partnership with the State Library, is soliciting bids for consultant services to develop the 2023-2027 California Five-Year State Plan.

The current plan can be found [here](#). Other supporting documentation, including the LSTA grant awards, programs, goals, etc., may be found [here](#).

Development of the Next Five-Year LSTA Plan (2023-2027)

A State Plan is a document that identifies a state’s library needs; sets forth the activities to be taken toward meeting the identified needs supported with the assistance of Federal funds made available under the Library Services and Technology Act (“LSTA”); and provides assurances that the officially designated SLAA has the fiscal and legal authority and capability to administer all aspects of any award under the Grants to States program (20 U.S.C. § 9122(5)). The State Plan must also provide assurances for establishing the state’s policies, priorities, criteria and procedures necessary for the implementation of all programs under the LSTA 20 U.S.C. § 9122(5).

Each state is required to submit a State Plan to qualify for LSTA funding. The Five-Year State Plan development process must meet the [guidelines established by IMLS](#).

The Five-Year State Plan must identify specific needs for library services to be addressed in the pertinent five-year period. This needs assessment shall be based on the SLAA’s most recent five-year evaluation, complementary data, and advisory input. The plan development process shall include descriptions of data sources, processes used to document the state’s needs, audiences to whom the data sources apply, methods used for data analysis, and expected processes for periodically updating the State’s knowledge of its library service needs.

Equity, Diversity, Inclusion, and Belonging

The principles of equity, diversity, inclusion, and belonging must guide the planning process and must be embedded in and integral to the plan.

Services to Include in Proposal

For the development of the next Five-Year State Plan, the following services must be included in the proposal:

- A plan development process that includes:
 - The development of a mission statement, goals, objectives, and activities to guide grant making.
 - Input from State Library staff and external stakeholders.
 - Findings and efforts from the evaluation of the current five-year LSTA plan period.
 - Knowledge and understanding of current and future library services and programs.
 - A needs and assets assessment comprised of:
 - Review and evaluation of the State Library’s current grantmaking.
 - Evaluation of groups and audiences to understand how to increase equity of the services and programs developed to achieve the plan’s goals.

- Evaluation of groups and audiences to understand libraries and their communities' needs and assets.
 - Evaluation of internal and external partners to enhance collaboration, increase equity of services, and reach the plan's goals.
 - Input from State Library staff and external stakeholders to gather data and information to be used to develop the plan's goals and objectives, and support projects and activities.
 - Identification and evaluation of existing resources and strengths currently available for effective implementation of a Five-Year State Plan.
 - Scheduled bi-weekly check-ins with State Library staff through point-person via email, phone, and/or virtual meetings.
 - Project management and coordination of activities to meet project timeline expectations.
 - The use of surveys, focus groups, and interviews to gather information from groups and audiences. Focus groups and interviews may be conducted virtually.
 - Development and delivery of a one-page document summarizing the plan to be used for external communication by the State Library. Summary document shall include visual elements. Summary document shall acknowledge IMLS support and conform to [IMLS Acknowledgement Requirements](#). Contractor may utilize the State Library's Library Development Services team for support.
 - Presentation of the plan framework to State Library staff and selected stakeholders.
- Completion of the Five-Year State Plan in the format prescribed in the [IMLS Five-year State Plan Guidelines for State Library Administrative Agencies 2023-2027](#). The plan should include:
 - A general timeline for program goals and project activities over the five-year period.
 - Mapping the plan's goals to the six Measuring Success focal areas as detailed in the IMLS guidelines.
 - Mapping each of the goal's projects to one of the fourteen intents as detailed in the IMLS guidelines.
 - Iterative evaluation processes during the implementation of the five-year plan.
 - Specific channels for communication and public availability of the five-year plan.
 - Certification and assurance information as required by IMLS.

Additional Information

The State Library will provide contact information for individuals and groups, as needed, for inclusion in surveys or focus groups. Virtual engagement with the library community is prioritized at this time. If any in-person communication with State Library staff becomes possible, it will likely take place in Sacramento. If in-person communication with the library community becomes possible, gatherings would be regional and could take place in northern, southern, and central California. A SurveyMonkey account can be provided to collect survey data.

Timeline for the Plan Development Process

- Project work to commence by December 8, 2021.
- Planning process conducted with State Library staff.
- Draft of the final plan to be submitted to the State Library by April 18, 2022.
- Revisions to the plan to be made in consultation with State Library staff and stakeholders.
- Presentation of the draft of the final plan to be delivered in May 2022 to State Library staff and selected stakeholders (date to be determined).
- Final revisions to the plan to be made in consultation with State Library staff and stakeholders.
- Final five-year plan deliverables to be completed and submitted to the State Library by June 6, 2022.

Reports must be submitted in both pdf and in an editable document (Microsoft Word preferred).

Instructions to Submit a Proposal

Please include the following elements in your response:

- **Identification:** Legal name and mailing address of the individual or firm submitting the proposal.
- **Contact:** Name, title, email address and telephone number of the person to be contacted to discuss questions regarding the proposal.
- **Introduction:** Brief description of the individual or organization submitting this proposal.
- **Personnel:** A list of key personnel and their qualifications, and a resume for each person who will be working on this assignment.
- **Qualifications:** Relevant skills, background, and experiences that make you a good fit for this project. Please include a list of similar or related projects that demonstrate expert-level knowledge and experience evaluating and developing five-year LSTA and/or large-scale strategic plans.
- **Work Plan:** A detailed outline of the project management strategy for this project that includes a timeline for activities, number of focus groups and/or meetings, person(s) responsible for activities, deliverable dates, and specific cost information tied back to activities. Please include an itemized quote for all costs, including labor, travel, lodging, office expenses, communications, and all other expenses.
- **Cost:** Total proposal cost should not exceed \$30,000.
- **References:** Contact information for up to three individuals who can speak to your qualifications and working relationships.

Time Schedule

Shown below are the dates and times by which actions related to this Request for Proposal must be completed. In the event that the Pacific Library Partnership finds it necessary to change any of these, it will do so by issuing an Addendum to this Request for Proposal.

- Request for bid proposals released October 18, 2021.
- Proposal questions due by noon on November 1, 2021. Responses to any submitted questions will be shared by noon November 5, 2021.
- Proposal due date is 4:00 p.m. on November 15, 2021.
- Proposal questions and the proposal (send as a pdf attachment) should be sent to:
Wendy Cao: caow@plsinfo.org
- Contractor Selection: Tuesday, November 30, 2021.
- Contract Award Date: Monday, December 6, 2021.
- Work begins: Wednesday, December 8, 2021.
- Planning process conducted with State Library staff.
- Progress report: Tuesday, March 1, 2022.
- Planning process conducted with State Library staff.
- Initial report draft to be submitted to the State Library by April 18, 2022.
- Presentation of the draft of the final plan to be delivered at the start of May 2022 to State Library staff and selected stakeholders (date to be determined).
- Revisions to the plan to be made in consultation with State Library staff and stakeholders.
- Final Five-Year Plan deliverables to be completed and submitted to the State Library by June 6, 2022.

Payment Schedule

Payments will be tied to the acceptance of each deliverable. Final payment will be made after Pacific Library Partnership accepts the final report.

10% payment: Upon signing of contract

40% payment: Upon completion and acceptance of a progress report: March 1

50% payment: Upon completion and acceptance of all Five-Year Plan Deliverables by June 6, 2022

Contact

Questions or other communications about this RFP may be submitted via email to Carol Frost at frost@plpinfo.org.