

PROPOSAL FOR SERVICES

Ned Cooney, Facilitator/Consultant

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To: Jennie Stapp, Montana State Librarian
From: Ned Cooney, Facilitator/Consultant
Re: **Proposal for Strategic Plan Facilitation Services**

Thank you for the opportunity to propose facilitation services to the Montana State Library, and to outline the proposed investment in this work.

Proposed Services

1. **Formulate the strategic planning design** (1/2 day) collaboratively with the State Librarian and others as appropriate, to prepare the planning process, agree on deliverables, and define the stakeholder input process. Included in this planning will be a means to design specific tools that address the Commission's desire for ongoing monitoring of implementation, evaluation of goal attainment, and evaluation of existing programs, projects and practices.
2. **Review background documents** (1/2 day) as identified in the Limited Solicitation and others deemed relevant, to integrate into the facilitated sessions (items 4 and 5, below).
3. **Input from stakeholders** (2 full days) in cooperation with the State Librarian and others as appropriate, determine the preferred methodology to collect and analyze observations and recommendations from identified key stakeholders. Options include individual interviews, surveys and facilitated meetings/focus groups.
4. **Facilitated meetings- Planning session with Commissioners and State Library staff as deemed appropriate** (2 full days) to develop components of a strategic plan, including:
 - analysis of background materials and stakeholder input;
 - analysis of current strengths, challenges and operating environment of the State Library;
 - visioning of desired results of the State Library for the next 5 years;
 - formation of key strategic initiatives/goals to support the vision;
 - planning for implementation to formulate a staff work plan for the coming year (to be annually updated), with specific tasks, timelines, and people assigned.
 - a tool to help the Commission and staff to examine each existing programs, project and practice so that each can be validated or "strategically abandoned".
5. **Document the results of stakeholder input and planning sessions and suggested stakeholder communication strategies** (1 full day) in a mutually agreeable format, with accountability and timelines assigned, delivered electronically within 14 days of the planning sessions.

Investment in Strategic Planning

Billable Days in the above Scope of Work:	6
Daily Rate for this project:	\$1,200
Total Investment by the State Library:	\$7,200

Inclusive of travel expenses, workshop materials, and other reasonable costs

Relevant Work Experience

Highlights of my qualifications include:

- I have worked as a consultant and facilitator in independent practice in Montana and the region since 2005. Since establishing my practice, I have engaged with over 75 clients, providing strategic planning services, organizational assessment, meeting facilitation, fund development strategies, management support, and board/staff development. Client organizations have ranged from public libraries to electric co-ops, human services to arts & culture, and conservation organizations to health departments. I have also worked extensively with facilitation of community collaborations and leadership/governance education. My experience and approach allows me to quickly learn about the unique challenges and assets of each organization and form a strong working relationship with organizational stakeholders to engage in an effective participatory process.
- I have extensive experience and a deep understanding of Montana's libraries, and the role of libraries in the modern world. As technology changes, community needs evolve, and support from the public depends more and more on relevance to people's everyday experience. Because of previous engagements with libraries, I believe I would have a valuable perspective about how the State Library can fulfill its legislative mandates to provide both direct services to the public, and to libraries across the state. Prior engagements with libraries include:
 - Imagine If Libraries in Flathead County, frequently since 2007: I have worked in a variety of capacities with staff, board of trustees, and the Foundation. Services provided include strategic and operational planning, evaluation and outcome measurement, organizational development, and professional skill development. In this capacity I learned about the Public Library Association process for planning and outcome evaluation, and also helped Imagine If implement a modified form of strategic planning in line with their recent rebranding.
 - Montana Library Association 2011-2012: I facilitated strategic planning and implementation planning. I have also presented at an MLA conference on evaluation of impact.
 - Tamarack Library Federation: Presenter at training sessions on organizational change, planning, and board development.
 - Lincoln County Library, 2011: I facilitated planning and director transition activities.
- Prior to establishing an independent practice, I served as the executive director of a nonprofit resource center in California, providing information, training and consulting to

other nonprofits to improve their operations and governance. This experience provided me with a broad perspective and deep experience with a variety of service organizations, ranging from small to large at various stages of organizational development.

- My educational background in social work and psychology provided grounding in systems thinking, group dynamics, and organizational development.

References

The following organizations have previously engaged my services for strategic planning and organizational development and would be willing to provide a reference:

Kim Crowley, Director
Imagine IF Libraries, Kalispell
406/758-5826
kcrowley@imagineiflibraries.org

Alan Satterlee, Executive Director
Glacier Symphony and Chorale, Kalispell
406/407-7000
alansatterlee@gscmusic.org

Sydney Blair, Executive Director
Center for Mental Health, Great Falls
406/761-2600
sydneyb@center4mh.org

Thank you again for your consideration of this proposal.