

**Smith-Ennismore-Lakefield Pubic Library Board**  
**Request for Statement of Qualifications and Price Proposal**  
**For the Completion of a**  
**Review of Current Library Services and**  
**Recommendations for Future Library Services Report**

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## 1.0 GENERAL BACKGROUND

The Smith-Ennismore-Lakefield Public Library Board (the Board) is requesting a combined Statement of Qualifications (SOQ) and a Price Proposal (Proposal) from Respondents capable of completing a Review of Current Library Services and Recommendations for the Future Library Services Report. (the Report)

The Report shall review existing library services and facilities, outline relevant emerging trends in the library sector, and include sufficient recommendations for the future, to allow the incoming Library Board of 2011-2014 to develop an implementation plan.

It is understood that the information in the SOQ and the Proposal shall be the general basis for the selection of a Respondent to provide this professional service and report. The Board expects to select the highest scoring Respondent based on a structured scoring evaluation. The scoring evaluation (Section 7) shall consider each Respondents ability to perform the required service, experience, technical experience, the personnel assigned to the actual project work, the costs of the project, the time period in which the Report will be completed and the reference check.

The Board reserves the right not to accept any Proposal.

## 2.0 BOARD INFORMATION AND BACKGROUND

### Amalgamations

The Township of Smith-Ennismore and the Village of Lakefield amalgamated on January 1<sup>st</sup>, 2001. The Township of Smith and the Township of Ennismore had previously amalgamated on January 1<sup>st</sup>, 1998.

As a result, the respective Library Boards of the former Townships and Village were also amalgamated effective January 1<sup>st</sup>, 2001 into the Smith-Ennismore-Lakefield Public Library Board.

### Geographic Information

The Township of Smith-Ennismore-Lakefield is the largest Township in the County of Peterborough and is situated in the heart of the Kawarthas, bordered almost entirely by lakes, in central Ontario. The Township borders the City of Peterborough to the south and is largely a rural community with three distinct urban centres, those being Lakefield, Bridgenorth and Ennismore.

The Village of Lakefield is a small urban community of approximately 2,500 people located on the Otonabee River, part of the historic Trent Severn Waterway system, south of Katchewanooka Lake. Lakefield is primarily a residential community with historic homes and heritage sites carefully combined with modern residential areas. Lakefield has a reasonably well-defined central core and a small industrial base. Lakefield offers many of the urban amenities in a quaint small town setting.

The Hamlet of Bridgenorth is a small residential community situated on beautiful Chemong Lake amid a largely rural landscape. Bridgenorth offers a centralized destination for shopping and services, and meets the daily needs of residents and tourists. Bridgenorth has lands suitable for a variety of commercial development.

The Hamlet of Ennismore is historically picturesque with the post office, general store, and community church centrally located as in days of old. Like Bridgenorth, the Hamlet of Ennismore is centered in a mainly rural area, and provides a focal point for community recreational and social events including ball diamonds, soccer pitches, tennis and basketball courts, ice and curling rinks and reception facilities. Chemong Lake, Buckhorn Lake and Pigeon Lake border the Ennismore ward.

The Township boasts many local attractions and events that enhance the quality of life for residents and tourists alike. Thousands of tourists visit the Township each year to enjoy the beautiful lakes, parks and recreation facilities, heritage and cultural sites and events, shopping, restaurants, campgrounds, cottages and festivals.

As well, a large number of seasonal residents call Smith-Ennismore-Lakefield home during the summer months and use of the library system increases.

Community spirit and enthusiasm is evident in the number of special events scheduled annually throughout the Township. These events are planned and operated largely by volunteers.

Recent investments in broadband have resulted in high speed internet access throughout the Township. However, it is important to note that pockets of residences throughout the rural areas may need to rely on dial up access.

### **Library Services**

With the amalgamation in 2001 the Board adopted a staffing model that had been in use at the former Townships and uses volunteers throughout the library system. As a result, all three branches have used volunteers extensively since 2001. It is anticipated that this approach will continue into the future to maximize resources and to continue to connect the library with the greater community.

At present the permanent Board employees are the Co-ordinating Librarian/Branch Librarian and two (2) Branch Librarians. The Chief Executive Officer/Treasurer is appointed by the Board in accordance with the Library Act. The incumbent is a Township employee, who also fulfils the duties of Manager of Financial Services/Treasurer.

The Standard Work Week for Coordinating Librarian is thirty five (35) hours per week and for the Branch Librarians is twenty five (25) hours per week.

In addition, the Board currently employs two part time employees under two year contracts. An Assistant Librarian and a Programming Coordinator work twenty (20) hours per week. As well, the Board maximizes funding programs to support internet access programs and summer student hiring.

The organizational structure and job descriptions of the paid library staff are attached as Appendix 2.

The Smith-Ennismore-Lakefield Library Service operates as a combined library system with three distinct library branch locations. One branch is located in each of the former townships.

Shortly after amalgamation the Board commissioned a library services study. The study was subsequently approved by the Board and has provided a guiding document to the Board for almost a decade with the majority of recommendations reviewed and implemented. (attached as an appendix)

As a result of recommendations included in the first Library Services Study, the Board has recently opened a newly constructed main branch library in Bridgenorth. This branch is larger in square footage and on site collection size, houses the main computer server, and is the base of operations for the Coordinating Librarian. The Lakefield and Ennismore branches, each with their respective Branch Librarians, continue to operate within the library system and also serving their respective communities of interest.

In 2006, the Library system implemented a new computer system accessible through the [www.MyPublicLibrary.ca](http://www.MyPublicLibrary.ca) . This online access allows for searches, reserves, and renewals from any internet access point. As well, a number of online reference resources have also been added.

The library mission states, "The Smith-Ennismore-Lakefield Public Library is committed to supporting and enriching the ongoing life of the community by providing resources and opportunities for recreational reading, life-long learning and personal development to individuals of all ages."

### **Land Planning Matters**

The current population of Smith-Ennismore-Lakefield is approximately 17,413 and there are approximately 8,182 households as defined by the Municipal Property Assessment Corporation.

Lakefield has been identified as a settlement area in County planning documents approved by the province of Ontario. The Lakefield South Development area has the potential for 300 new residential units to be constructed on the westerly limits of the former Village of Lakefield. Recently the Township was successful in a number of grant applications that could enable infrastructure to be completed that will benefit the area and may provide a jumpstart for growth. A copy of the Lakefield South is available from the Township planning staff and referenced in Appendix 1.

The Township may also be affected by development at its southern boundaries by developing residential communities in the neighbouring City of Peterborough. A copy of the Carnegie and Chemong Road Secondary Plans are available from the City planning staff and referenced in Appendix 1.

Both of these development areas have the potential to impact Smith-Ennismore-Lakefield library services and should be reviewed as part of the preparation of the Report.

### **Budget – Library Board of Smith-Ennismore-Lakefield**

From a community development perspective the Township Council is very supportive of the Library Service and endorses the continuation of a three branch library system. Likewise from a financial perspective, the Board and Council are supportive of a multi-branch system model for library services. Ultimately the Smith-Ennismore-Lakefield Library service financial model recognizes the importance of a local library as a destination and place for the community to meet and interact, while maximizing the sharing of collections, resources and technological benefits of online collection services, the internet and emerging collection material formats.

Approved budgets and financials for the Board from 2007 - 2009 are attached hereto as Appendix 3.

### **3.0 The Project**

The Board requires a Review of Current Library Services and Recommendations for the Future Library Services to address the developing needs of the Township specific to library services. It should provide a guiding document for the Board and staff in the operations of the Library system over a five to ten year planning horizon. The Report should make known to the general public, the role of the Library Service as a part of the overall community.

- a) While this project is required to address all of the typical components of a Library Services Review, particular attention should be focused on the following issues and questions:

#### **Emerging Trends in the Library Sector**

A primary reason for the completion of the Report is to be prepared for changes expected in the library sector. The successful Respondent should be well versed in these matters and be prepared to readily share experiences, emerging trends and relevant developments that could benefit the Smith-Ennismore-Lakefield library system.

#### **Our Changing Service Delivery Model**

The Smith-Ennismore-Lakefield library system, as expected, no longer operates as three branches, but rather one system with a larger central branch and two satellites. Suggestions as to ways that this change could possibly strengthen all locations, rather than detracting from any, are welcomed. An analysis of comparative multi-branch systems may provide relevant best practices for review and implementation.

### **The Role of Programming**

What is the primary purpose for library programming? From a staff perspective there is consensus that core children's programming should exist at each branch so that the library can have a meaningful impact on developing new readers and literacy. Given our specific demographics in relation to other comparable jurisdictions, is this the correct direction?

### **Volunteer Engagement and Management**

With respect to the impact on staff deployment, a good deal of staff time is spent supporting our volunteer services model and does have an impact on other duties expected of our staff.

Much of the relevant literature advises that volunteering is changing. Long term commitments are gradually moving towards short term project centred volunteer opportunities. The Smith-Ennismore-Lakefield library system success with long term volunteer commitments may be related to the practice of providing meaningful activities for our volunteers that maximize their strengths and interests. Volunteer trends need to be closely monitored and our opportunities for volunteering need to evolve with the changing sector.

Provide an outline of relevant best practices and success stories.

### **Relevant Statistics**

Circulation has been the accepted library standard when discussing community impact, performance measures and benchmarks. However, as online databases gain more acceptance, and the library becomes more of a community place versus a book exchange, other measures such as web tracking, branch traffic increases, e-resource use and other relevant statistics require attention and tracking. What other emerging statistics should be tracked, analyzed and promoted to our funding partners and the community.

### **Suggested areas for improvement**

Having become familiar with the Smith-Ennismore-Lakefield library system and services provided, outline some suggested areas for improvement having regard for the specific community and financial realities of a mid sized library system.

### **Strategic recommendations for change**

As part of a forward looking document, the Report should position the library service for the future through proactive approaches to decision making. Recommendations should include a timeline for decision making, with priorities for implementation, based on the experience of the successful Respondent and the emerging trends in the library sector.

- b) The Report is to be developed with input from the Board, Library staff, library volunteers, municipal staff and the public. While a non-user survey is not specifically required as a part of this project, the Respondent is required to outline the methodology for contacting users and the greater community.

- c) The Respondent is required to set out the various components of their proposed approach and the time lines attached thereto. As part of the information required the Respondent shall provide the date that the draft Report will be finished. (The draft Report shall be completed by no later than September 30, 2010.)
- d) Upon completion, the successful Respondent shall formally present the draft Report to the Library Board and provide ten (10) bound copies, one (1) unbound copy, and one electronic copy in Microsoft Word format.

#### **4.0 Respondent Information Required in this Request**

##### **Statement of Qualifications**

Each Respondent must respond to each of the following requests/questions in a clear and comprehensive manner.

- a) Provide the full name and main office address of the responding entity.
- b) Identify when the Respondent was organized and if a corporation, when incorporated and how many years engaged in providing this type of service.
- c) Identify and set out the qualifications of any firms or individuals that the Respondent intends to subcontract or otherwise use to perform work on this project.
- d) Describe the Respondents specific and relevant experience related to the scope of this project.
- e) Describe the Respondent's depth and resources that would also be available for the benefit of this project.
- f) Identify the personnel who would take the lead position in this request and set out their particular qualifications and experience in carrying out this type of work.

#### **5.0 Respondents Proposal**

Each Respondent must respond to each of the following areas in a clear and comprehensive manner.

- a) The areas a) to c) as outlined in Section 3 "The Project".
- b) Provide a confirmed price for the project with the expected payment schedule.
- c) Specifically identify any additional work or services that exceed the services requested herein, rationale for need of this additional work or service, and the associated costs thereof.

- d) Provide references from the last three (3) Library Services Studies that the Respondent has completed and, if not included in the forgoing, a reference from a Board of similar size and components as the Board of Smith-Ennismore-Lakefield.
- e) Identify the estimated amount of Library staff time required to participate in the Report.

## 6.0 Schedule of Events

Item	Date
Request for SOQ and Proposal Issued	February 19, 2010
Submission Deadline	March 19, 2010
Completion of evaluation and scoring of submissions to provide report and recommendation to the Library Board	April 9, 2010
Anticipated Award of Contract	April 14, 2010

Each Respondent will submit (7) bound copies and one unbound copy of the Proposal no later than **12 noon on Friday March 19, 2010** addressed as follows:

Delivery Address: (courier or hand delivery only)

R. Lane Vance, CEO/Treasurer  
 Smith-Ennismore-Lakefield Public Library Board  
 1310 Centre Line  
 R.R. #4  
 Peterborough, Ontario  
 K9J 6X5

The outside of the shipping carton/envelope must be clearly marked "**Statement of Qualifications/Price Proposal - Library Services Report**" together with the Respondents name.

Any Proposals received after the above deadline will be returned unopened to the Respondent.

## 7.0 Scoring of Submissions

The evaluation of the submissions, and of the Respondents presenting them, will be carried out by municipal and library staff with a recommendation brought forward to the Library Board. The Library Board will make its decision based on information gathered during the procurement process and the evaluation criteria outlined in this section. Failure to provide relevant information may result in penalties being assessed on the evaluation score.

Respondents will be evaluated based on the points system identified in Table 1. The evaluation matrix outlined in Table 1 will be used to address the following criteria:

- Qualifications to provide the Report based on previous experience, capability and resources,
- Qualifications of the personnel responsible for conducting the Report in terms of expertise and experience in doing similar studies for a similar type of Board,
- The quality of the Submission in terms of completeness, presentation, and timing,
- The Respondents responsiveness to the SOQ/PP,
- The Business approach and methodology employed to complete the Report.

The Board reserves the right to reduce points scored for the Proposal based on terms and conditions associated with the price proposal or exceptions taken which in the Board's view would be unfavourable to it.

Selection of a Respondent to perform this professional Report will be based upon qualifications, experience, historical performance record, understanding of needs, price, suggested innovations and the Respondent's proven capabilities. In addition to the data and documentation being submitted by the Respondent in response to this request, the Board will also rely on information received from the references submitted with the proposal.

## **8.0 PRE-SUBMISSION AND OTHER INFORMATION**

If any Respondent has questions concerning the request, finds discrepancies or omissions in the solicitation document, or requires clarifications, such matters should be submitted in writing to:

R. Lane Vance, CEO/Treasurer	Telephone	705-292-9507 Ext. #217
P.O. Box 270	Fax	705-292-8964
Bridgenorth, Ontario	E-mail	rlvance@nexicom.net
K0L 1H0		

Contact with the Library Board members is prohibited and can be considered as grounds for disqualification from the selection process.

The Board reserves the right to request additional data or information after the Proposal date, if such data or information is considered pertinent, in the Board's sole view, to aid the review and evaluation process.

The Board reserves the right to supplement, add to, delete from and change this solicitation document. Respondents will be advised by fax or e-mail of any changes.

The Board reserves the right to reject any portion of any Proposal and/or reject all Proposals, to waive any informalities or irregularities in the Proposals, or to re-invite.

### **Additional Contact**

Joan MacDonald	Phone	705-292-5065
Co-ordinating Librarian	Fax	705-292-6695
Bridgenorth Library Branch	E-mail	<a href="mailto:jmacdonald@mypubliclibrary.ca">jmacdonald@mypubliclibrary.ca</a>

**Table I - Evaluation Matrix - Statement of Qualifications**

<b>Criteria</b>	<b>Maximum Points</b>	<b>Points Scored</b>
1. Respondent Profile <ul style="list-style-type: none"> <li>• General capabilities</li> <li>• Years in business</li> <li>• Experience and depth</li> <li>• Specialist support services</li> </ul>	10	
2. Respondent Experience <ul style="list-style-type: none"> <li>• Complexities and size of studies</li> <li>• Number of studies of similar size and complexity</li> <li>• Number of employees directly involved in projects</li> <li>• Years of experience</li> <li>• Corporate depth and resources</li> <li>• Other relevant experience</li> </ul>	20	
3. Report Plan <ul style="list-style-type: none"> <li>• Understanding of the Project</li> <li>• Creativity:                             <ul style="list-style-type: none"> <li>• Innovation</li> <li>• Methodology</li> <li>• Approach</li> </ul> </li> <li>• Clarity of presentation of services to be provided</li> <li>• Reference Checks</li> <li>• Timing</li> <li>• Experience in meeting set schedules</li> </ul>	25	
4. Personnel Assigned to this Report <ul style="list-style-type: none"> <li>• Home office management involved and role throughout the project</li> <li>• Organization chart, reporting, etc.</li> <li>• Qualifications and experience</li> </ul>	10	
<b>Total score for all components other than price</b>	<b>65</b>	

**Table II - Evaluation Matrix - Price Proposal**

<b>Criteria</b>	<b>Maximum Points</b>	<b>Points Scored</b>
<b>6. Price</b> (points weighted in relation to all received)	35	
<b>Total score – all components including price</b>	<b>100</b>	

# **APPENDIX 1**

## **Existing Municipal and Library Plans**

### Official Plan and Zoning Bylaws

The Township Official Plan is included within the County of Peterborough Official Plan. The Zoning Bylaw has recently been updated, consolidated and is consistent with the Official Plan and the Provincial Policy Statements.

### Secondary Plan – Lakefield South

The Township has placed an emphasis on directing residential growth opportunities to the Lakefield urban area. The Township has, in partnership with local landowners, completed the necessary background technical studies and planning documents to create 330 acres of development ready lands just outside of the former boundary of Lakefield. The Official Plan Amendment which establishes the residential land uses within the 330 acre area was approved in March of 2004.

### City of Peterborough Planning

Carnegie Secondary Plan  
Chemong Secondary

### Library Services Review

This report, completed in 2003, investigates a full range of issues associated with current and future library services. The Township's library system is relatively unique in the Province as it relies to a great extent on volunteers to provide service to our patrons. This study defined future service directions and created a long-range plan for the library system.

### Interim Library Plan

The Interim Plan focuses on further developing the library system within the Township. This Plan focused on four core areas:

- Facilities
- Staffing and volunteers
- Collection and programs
- Board and policy

Within these core areas, the interim plan outlined strategic actions which are required to achieve desired outcomes. The objectives outlined over two year timeline:

- Allows time for the effects of the online collection system
- Built upon the completion of the new Bridgenorth Branch.
- Recognized operating hours changes and room for more
- Built on the current level of engagement with existing Board members