



DRAFT November, 2013

VALE Request for Proposal
RFP #XXXX: Organizational Review Retreat Facilitation

1. Purpose and General Information

The Virtual Academic Library Environment of New Jersey (VALE-NJ) requests proposals in response to our need for a retreat facilitator to organize and oversee exercises that will provide our organization with the information and framework for a critical review of the structure and functioning of the Virtual Academic Library Environment of New Jersey (VALE-NJ).

2. About the Virtual Academic Library Environment (VALE) of New Jersey

The VALE consortium was founded as a grassroots voluntary membership organization in 1998 to further excellence in learning and research through innovative and collaborative approaches to information resources and services. VALE now consists of 53 college and university member libraries, as well as the New Jersey State Library. Through its services and leveraged licensing of databases, VALE serves a combined student enrollment of more than 330,000 FTEs. A series of twelve standing committees comprised of scores of volunteers from member libraries provide the backbone of VALE's suite of services and professional development opportunities. Governed by an Executive Committee, VALE is a self-funded organization receiving no external monies. Its paid staff consists of one 0.6 FTE Coordinator and one 0.17 technology support staff member. More information about the consortium is available at www.valenj.org.

3. Scope of Work and Services

VALE-NJ seeks to execute a contract with a consultant to organize and facilitate a one-day retreat designed to initiate an evaluation of the structure and functioning of the consortium. This retreat should aid VALE in assessing its progress through examining how well it does its work. Guidance on how to identify and understand organizational strengths and weaknesses should be central to the overall approach.

Goals and Objectives of Preparation and Results

The work and results should enable participants to:

- Understand and assess VALE's structure and workflows;
- Determine if the organization functions efficiently and effectively and responds to needs of the member institutions;
- Ascertain if VALE sets relevant goals and objectives, creates realistic policies and procedures, and implements effective plans to accomplish what it aspires to achieve.

VALE Request for Proposal
RFP #XXXX: Strategic Planning Retreat Facilitation

Facilitator Responsibilities

VALE will provide background about the organization to the facilitator as needed. The facilitator will:

- Read the necessary background information to become familiar with VALE’s mission and operations, including the 2006-07 strategic planning documents;
- Participate in a planning session (1-2- hours) with the VALE Strategic Planning Subcommittee;
- Develop, organize and facilitate a day-long retreat (1 day only) that is collaborative in approach with activities that encourage engaged dialogue; and
- Produce a summary report of the retreat activities including the observations of participants and the facilitator.

This project will be managed by the VALE Strategic Planning Subcommittee under the guidance of the VALE Executive Committee. The Strategic Planning Committee has surveyed VALE officers and committee chairs to gauge opinions on organizational effectiveness but is willing to repeat the exercise with better instruments. Retreat participants will include the Executive Committee, committee chairs, and the Member’s Council, with a maximum retreat attendance of seventy (71).

Project Budget

The facilitator will complete this project at a cost not to exceed \$5,000. Each bidder’s proposal must include a proposed budget that addresses specific costs, operational expenses, and deliverables to fulfill contract obligations. The consultant shall provide the names and resumes of all persons that will be engaged in this effort.

4. Preliminary Timeline and Critical Dates

Critical dates for completing the project are below. VALE reserves the right to modify this timeline.

<u>Activity/Event</u>	<u>Date/Time</u>
Issue Request for Proposal (RFP)	
Proposals Due	
Execute Contract	
Deliver Final Project Report	

5. Proposal Package and Process

- Proposal Package
 - Proposal Due Date
 - Confidentiality
 - Selection Process and Evaluation Criteria
 - Contact for Questions and Correspondence:
-

VALE Request for Proposal
RFP #XXXX: Strategic Planning Retreat Facilitation

Exhibit One: VALE Survey Questions for EC Chairs

VALE Strategic Planning 2012
Questions for EC Chairs

1. Aside from managing group purchasing of electronic resources and organizing the annual VALE User's Conference, what are VALE's core activities?
2. Do you think that VALE as an organization is designed to carry out successfully the activities you cite in Question One? If not, why, and how might it be re-designed to be more successful?
3. The EC charge states that “. . . the role of the Executive Committee [is] to ensure that VALE is meeting the needs of the academic library community by undertaking formal assessments and ongoing evaluation of VALE activities.” Do you think the EC assesses and evaluates VALE's activities successfully? If not, why, and how might it do so?
4. Does the statement below from the 2007 Planning Review fairly describe the relationship between the VALE Executive Committee and the VALE committees? If so, how might this disconnect be remedied?

“Committees were . . . surprised and dismayed that their work was so frequently unknown to those surveyed . . . [They] described working in isolation and requested a closer relationship with the Executive Committee and each other.” (Review of the 2007 VALE Assessment Survey Report, 2)

5. Do you think having EC members as liaisons to the VALE Committees is an effective way to monitor the work of the committees? If not, what might be a better way?
6. From your view as EC chair, what are some strengths and weaknesses of the Executive Committee? How might it be more effective?

The Executive Board Committee serves as the oversight committee within the Council for the ongoing operation and growth of VALE. Recommendations regarding the purchase of databases, other software and hardware; about issues pertaining to networking, training, documentation, publicity, and other collaborative projects, will be reviewed and approved by the Executive Committee. It is the role of the Executive Committee to ensure that VALE is meeting the needs of the academic library community by undertaking formal assessments and ongoing evaluation of VALE activities. The Executive Committee will seek external funding for the continued growth of VALE and will work within the academic library community to leverage collaborative purchasing with existing resources. The Chair of the Executive Committee (2 year term) will be the official liaison between the Executive Committee and the Members' Council.

The Chair will report regularly to the Council on VALE activities, seek advice on future initiatives, and provide a yearly assessment of VALE's operations. The Chair will coordinate the work of the Executive Committee and its committees, will call meetings, and promulgate results of discussions, decisions, and recommendations. Planning and policies will be developed by the Executive Committee in collaboration with participating libraries. In order to take advantage of opportunities in the marketplace as database producers introduce new and enhanced products, networking opportunities become available, and as libraries wish to collaborate on additional initiatives, planning and policies will continue to be flexible.

VALE Request for Proposal
RFP #XXXX: Strategic Planning Retreat Facilitation

Exhibit Two: Survey questions for VALE

Committee Chairs

VALE Strategic Planning Committee 2012
VALE Committee Chair Poll

Survey questions for the chairs of VALE committees:

1. What are VALE's core activities?
2. With regard to your response to question One, why is your committee part of VALE (as opposed to other library organizations)?
3. When was your committee most effective? Why was this so?
4. When was your committee least effective? Why was this so?
5. Does the statement below from the 2007 Planning Review describe your experience serving on your committee? If so, how might this disconnect be remedied?

“Committees were . . . surprised and dismayed that their work was so frequently unknown to those surveyed . . . [They] described working in isolation and requested a closer relationship with the Executive Committee and each other.” (Review of the 2007 VALE Assessment Survey Report, 2)