

## Long Range Planning Consultants Comparisons

### Michael Holmes -- [Insights4u](#)

Michael has experience in board development, leadership development, organizational and talent development, organizational diversity and recruiting, and strategic planning. He has facilitated board retreats for strategic planning purposes. I spoke with him about our goal of approaching our strategic plan with an equity lens and he provided information about his work in that area. Talked about including pricing for “wrap around services” which would help with implementation of the plan. He can write a plan for us, or we could write it based on our work with him and with his guidance. He would want to have an initial conversation with the board. Pricing: For **\$20,000** he would provide the highlighted services on the attached document, titled Board Development Services. This would include providing input into the plan that is written by us. For an additional **\$7,000**: “In order to write and deliver the strategic plan and execution timeline, along with milestone metrics, that would require an additional \$7K. Also, if you wanted me to help coordinate and facilitate additional focus groups and/or town halls than are specified in the document we can discuss pricing for those add-ons.”

I spoke with references: Darrel Byers, CEO of Interise (national organization, \$5.2 million, help 1,000 small, minority-owned businesses). They worked with Michael on inequity issues left over from previous leadership. They are still working with him -- COVID interrupted a bit.

Rhonda Neil, CEO of Saint Joseph Parenting Center, Stamford, CT. Rhonda worked with Michael on board building, team building, and implicit bias work. She was his intern at Inroads, Inc. Worked with her on developing her leadership skills. She worked with Michael on a project with GE that was tasked with developing and retaining talent and diversity within the company through an internship program.

### Jeanine Esposito -- [Innovation Builders](#)

Jeanine has worked in a consulting capacity with several large companies, non-profits, and academic institutions. She was the creator and trainer for the EXCITE Transformation for Libraries program that Allison Robbins and I participated in in 2018. She recently worked with New Haven Public Library on their strategic framework (see attached). Her full process is training intensive with lots of hands-on time and meetings and is meant to equip key staff with skills that will help them with a continual planning approach using a strategic framework based on empathy-driven feedback from the community. She is willing to work with us on price. Initial pricing is out of range at **\$75,000 to \$105,000**.

### Pam Fitzgerald -- [The Ivy Group](#)

The Ivy Group has worked with Brooklyn Public Library, Queens Library, San Antonio Public Library on strategic planning. In order to keep costs down, she would train board members and library staff to conduct interviews with people in our community. Optional market segmentation to gather data about our community is advised. Possibly could do benchmarking against up to 4 libraries of similar size and demographics. Not a fan of focus groups -- they only attract people who love us or hate us. Could train us to run a town hall. Core services (research, trustee interviews, tour and two days of meetings, writing the plan): **\$17,182**. See [proposal](#) for options.

Evan Kingsley -- [Plan A Advisors](#)

Evan has worked with the Greenwich Public Library on their capital campaign. He worked on a feasibility study for Darien Public Library. Scarsdale Public Library and Mount Pleasant Public Library have also worked with him on strategic planning. Worked with Westport Public Library when they were dealing with controversy over a repurposing of public space. His process starts with a ¾ day retreat to set goals and objectives. Research follows, then a tactical plan. A steering committee of 7-11 people (1-3 people from the community, a representative of the board of trustees, staff). Conducts interviews. Creates a public survey. Series of roundtable discussions with community leaders, community members, with no library staff present. Demographic analysis. Peer scan -- visits to other libraries for steering committee members with a "what to look for" protocol. A retreat follows the research -- entire board, Friends, Foundation. Framework is shaped. Steering committee meets to finalize the framework. Works with us on tactical plan. Board has its own tactical plan. The final document is not a book, but a Powerpoint with 6 slides -- a visual statement, with 5 main goals. They write a chapter on each goal. They have a person fluent in Spanish who can translate. Pricing ranges from \$40,000 on up.