

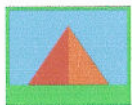
**A PROPOSAL FOR A SPACE NEEDS/FACILITY STUDY  
FOR THE DOWNTOWN LIBRARY**

**ANN ARBOR DISTRICT LIBRARY  
Ann Arbor, Michigan**

Submitted by:  
PROVIDENCE *Associates LLC*  
Library Planners Consultants  
Cottonwood, Arizona

In Collaboration with  
Holzheimer Bolek Architects LLC  
Chagrin Falls, Ohio  
and  
Cornerstone Design Architects, Inc.  
Ann Arbor, Michigan

January 22, 2007



PROVIDENCE *Associates LLC*



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**1. Qualifications including recent experience on similar projects with names, addresses, phone numbers and email address.**

PROVIDENCE *Associates LLC* is a library planning consulting company that has been serving the planning needs of libraries of all types since 1979. The firm has been involved in dozens of library planning and programming projects similar to that of the Ann Arbor District Library. PROVIDENCE has consulted with over 300 libraries in 45 states and abroad, including successful public library planning and programming projects in Michigan. We consider each client's needs to be unique; therefore, PROVIDENCE assembles a team of library professionals whose expertise matches the specific needs of the client.

PROVIDENCE knows libraries. We know how to listen to clients and to citizens and how to talk with and translate information between the client/owner and the architect. Our past work is marked by a great deal of success reflected in the fact that 90 percent of our clients have implemented our recommendations. Many of our clients are repeat customers.

All members of the PROVIDENCE team are or have been public library administrators and are recognized leaders in U.S. public libraries. In our professional lives each has had direct experience with needs assessments, facility planning, developing building programs, and working with architects for multiple library facility projects.

Our own professional experience reflects the opportunities, challenges and issues facing our clients. We have actively coordinated and participated in numerous presentations and public events designed to involve library staff, library boards, community stakeholders and residents to gather ideas and ensure a building program that represent expressed service needs and expectations for both today and for the future. We have participated in and assisted with design charettes and have advised on building projects from inception through grand opening celebrations.

In our capacity as "Library Planners Consultants" PROVIDENCE is focused not only on key elements of library services, technology and design, but we are also aware of new services and service models and the way in which today's leading libraries are addressing these through space planning, design, technology, furnishings, fixtures and equipment. We bring to all of our projects knowledge of effective methods being used successfully by other progressive libraries throughout the nation in meeting the needs of their changing communities. In addition, we are keenly aware of and incorporate concepts of "green buildings" and sustainability into our building programs.

Our methodologies include research and analysis of existing sources of data combined with direct community input from focus groups comprised of targeted categories of area residents and library users, and through "town hall meetings." We estimate that in our 27 years of library facility planning we have facilitated well over

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2,000 focus groups and stakeholder interviews. We also have and, if desired, are able to offer web surveys, mail surveys, in-library surveys and community telephone surveys (especially when trying to reach non-library users) based on the client's desires.

We interact and communicate with local planning departments and state agencies to secure the best and most reliable information about population projections, demographic profiles, comprehensive plans and transportation plans for each service area. We often use the services of a demographic research firm to get a current demographic profile of each service area that reflects age breakdown, level of education attained, households by size, families with children, single parent households, income, ethnicity or race, percentage of home ownership, number of vehicles, etc.

Our philosophy of planning and programming library facilities is based first on identifying what members of the community want from their library in terms of services. We then determine what the community believes the strengths and weakness of the library to be, including aspects of the facility itself. We use this information as the starting point for determining if the existing facility is adequate to meets these expectations. Added to this assessment are projections for population growth and demographic changes that are likely to impact collection size, demand for technology, demand for different options of service delivery, a change in service emphasis, and impact on library staffing. With all this information in hand we then begin to determine the size facility needed for providing library services for at least the next twenty years. In other words, we strongly believe that to provide long-lived flexible library facilities, "form" (amount of space, design or space, etc.) "follows function" (services, collections, need for community meeting space, dedicated children's area, dedicated teen spaces, café or coffee carts, group and quiet study spaces, etc.).

All of our reports are prepared as drafts for thorough review and comment by the client, Boards of Trustees, local officials. We present our findings and recommendations in person to the client and Board, the community in Town Hall meetings and to local officials as needed. Our presentations are succinct and focus on information that helps the each audience understand the process, the identified need and recommended next steps. We use PowerPoint presentations combined with audience interaction through dialog and discussion. The purpose of our presentations is to justify recommendations, ensure consensus and identify the any need for revisions that add to both the credibility and support for the recommendations.

This will be a collaborative planning process where forward thinking and a variety of opinions are encouraged, which will lead to innovative and effective solutions. For this project we are teaming with Peter Bolek of Holzheimer Bolek Architects, LLC (HBA) of Chagrin Falls, Ohio and Richard Henes of Cornerstone Design Inc of Ann Arbor, Michigan. These firms will engage in the physical and environmental assessment of the Downtown Library and will work with PROVIDENCE and AADL in providing the documentation, from a building integrity perspective, that will justify recommended options concerning the existing Downtown Library facility. HBA has significant

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experience in both planning and designing public libraries in southeastern Michigan. Cornerstone Design has significant experience in physical and structural assessment of facilities in Michigan, specifically the Ann Arbor, Washtenaw County area.

Below is a select list of public library clients, over the years, for which PROVIDENCE has successfully conducted facility needs assessments and developed building programs.

Bay County Library System (MI)  
Grand Rapids Public Library (MI)  
Rochester Hills Public Library (MI)  
Boise Public Library (ID)  
Des Moines Public Library (IA)  
Howard County Library (MD)  
Jacksonville Public Library (FL)  
Louisville Free Public Library (KY)  
Memphis Shelby County Library (TN)  
Nashville Public Library (FL)  
Pikes Peak Library District (CO)  
Richland County Library (SC)  
Yuma County Library District (AZ)

We are pleased to present the following projects as recent (within the last five years) examples of our work with both clients and architects.

**FRISCO PUBLIC LIBRARY, FRISCO, TX**

PROVIDENCE Associates was first engaged to prepare a master plan for this fast growing suburb north of Dallas. The city anticipates an ultimate build out population of 250,000, up from a current figure of 58,000. Our study, and final report, addressed facility needs, collections, information technology, staffing, and capital and operational budget needs. During the course of the study we mapped the entire city, dividing the city into four quadrants due to the existing and planned roadway system, held several focus groups, conducted a telephone survey, and interviewed staff and the Library Board. We also held a one-day planning retreat with the Board, Friends, Mayor, members of the City Council, and Library staff. Following a successful bond election (success was forecasted in the telephone survey) we were hired to prepare the building program for the recommended new Central Library – a project that houses under one roof a 100,000 SF Library and a new City Hall of about 50,000 SF.

Please contact:

**Ronald R. Heezen**, Ph.D., Library Director, 6101 Frisco Square, Suite 3000, Frisco, TX 75034, Telephone 972.282.5669, e-mail [rheezen@friscotexas.gov](mailto:rheezen@friscotexas.gov)

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**GADSDEN PUBLIC LIBRARY, AL**

PROVIDENCE Associates was contacted by Mr. Lee Howington, Library Director, to enlist our services in a plan to renovate the 40-year old, four-level public library facility. Following the development of a space plan we met with the Mayor, some members of the City Council, the Library Board, and key Library staff to review the plan and outline the next steps and the probable costs. Based upon the presentation and resulting discussion the Mayor indicated his support for the project to move forward and expend \$2.5 million.

The Library then hired PROVIDENCE to prepare a building program for the renovation of the facility. During that phase of work, through additional contact with the Mayor and other officials in Gadsden an additional \$500,000 was appropriated for the project. In addition, we provide library technology consulting. The project was completed the spring 2006.

Please contact:

**Lee Howington**, Public Services Librarian, Gadsden Public Library, 254 College Street, Gadsden, AL 35901, Voice 256.549.4699 x 107, e-mail [lee@library.gadsden.com](mailto:lee@library.gadsden.com) *NOTE: Mr. Howington, who was the Director during our work with the Library, requested that he no longer be the Director of the Library following the completion of the project. The Library Board and City Council approved his request, hence his change in title.)*

**Grand Rapids, MI** - Grand Rapids was - in the mid 1990s -- one of the few cities in the country that did not have a major Central Library space problem. Their two-building complex of 100,000 SF was of adequate size. However, the 1967 addition was not well conceived and did not work well with the abutting 1904 Ryerson Building (an historic landmark). We were hired in 1994 to prepare a revised space plan, write a building program, and help develop a cost estimate for a renovation and very modest expansion of the building and the adjacent parking area. We hired a Philadelphia architectural firm, and worked with a local construction management firm. We also conducted focus groups and prepared a report on new and innovative services being offered by libraries. Our study was presented to the staff, Board, and Advisory Committee in March 1995. The project was funded via a vote of the people November 1997. We were subsequently engaged by the design team to assist with a revision of the building program in order to address changes that have taken place with library operations and staffing. The completed project was dedicated May 2003. Please contact:

**Robert Raz**, Director Emeritus, 60 Library Plaza, NE, Grand Rapids, MI 49503.3219, Telephone 616.456.3623.

**Denver, CO** - This was an expansion and renovation project. The new construction was dedicated March 1995, the renovation completed in 1996. The total building complex, 576,000 SF, cost approximately \$75 million. We were first hired to prepare

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a space needs assessment for the Central Library. Following completion of that phase of work we were asked to (a) conduct a site study, (b) analyze the existing building, (c) write a building program statement, (d) plan and accompany library staff and commission members on a national tour of other new large library buildings, (e) participate in the selection of architects via a design competition, (f) plan and accompany the staff, Commission, and selected architectural firm on a second national tour, (g) review all a/e plans and specifications, (h) consult with the library on the development of their system-wide technology plan, and (i) work with an environmental conditions firm to help achieve a "healthy" building.

Please contact:

**Rich Ashton**, Retired City Librarian, 217 S. Jackson Street, Unit A, Denver, CO 80209.3132, Telephone 303.322.9261, email [rickashton@msn.com](mailto:rickashton@msn.com)

**Santa Monica, CA** - We first reviewed and updated a Space Needs Assessment report prepared by a Los Angeles architectural and planning firm. We next prepared a new Space Needs Assessment for each department of the Library. Following agreement, we held a half-day workshop with the staff to explain our programming process and to answer staff questions. Next, we prepared a draft building program for a planned renovation and expansion of the existing building. Following a prolonged contractual process with the design architect, and the hiring of a construction manager, a decision was made to build a totally new building. A new program was prepared, and a revised cost estimate prepared. The building opened in January 2006.

Please contact:

**Greg Mullen**, Assistant Director, 1343 Sixth Street, Santa Monica, CA 90401, Telephone 310.458.8600.

**Holzheimer Bolek Architects Library Projects** see Appendix A

## **2. Description of methodology and plans, including estimated timetable for completing project**

The focus of the study is to determine the facility needs of the Downtown Library for at least the next twenty years. As part of the scope of work, the consultants will evaluate use of current space and assess future space needs for collections, public services and support functions for a minimum of 20 years. In addition, they will assess the physical and environmental conditions and functionality of the current facility including electrical, mechanical and HVAC systems. The assessment is designed to identify opportunities and constraints for future library services and use including technological applications. The consultant will develop alternatives and rough cost estimates for feasible options that will meet future space and building needs and will outline the opportunities and constraints for each.

The consultant selected for this project will engage in a thorough assessment of existing facilities and current library usage patterns. In taking a long range view of the future, the consultant will determine projected changes in demographics and in the manner in which library services are or may be provided. The consultant will identify and recommend specific library service areas defined by current and projected demographic profiles, library access via transportation corridors and traffic patterns, customer expectations, current and likely technological advances that impact delivery of library service to customers, and any other criteria determined important by the AADL and the consultant. We view the consultants' role in this project as helping AADL and other decision-makers look at library services, library service delivery, and the Downtown Library facility with new eyes.

The "outside" eyes supplied by the consultant are important in that they will be gathering and organizing a large quantity of information and offering a professional analysis and professional opinions of what *they* see in the existing services and library facilities. Nevertheless, what is just as important, if not more important, is the quality of the communication between the consultants and AADL and the local decision-makers. The consultants must effectively share their analyses and opinions so all stakeholders can fully understand the implications of decisions that need to be made. AADL must in turn help the consultants fully understand the local context within which decisions must be made. When the process is complete, everyone involved needs to have a new, clearer vision of what needs to be done based on an in-depth, professional assessment of the existing situation, a consideration of new and emerging trends in library service delivery, and an understanding of local realities and sensibilities.

In short, this project is about a new vision for the Downtown Library and the current and future services that will be provided. It is about fashioning a facility plan based on solid data and on sound professional judgment that also captures the imaginations of all involved. Public libraries are durable institutions. New and improved library facilities will impact the lives of the residents of the District for many years to come. It is important



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that planning for the Downtown facility be as thorough and comprehensive as possible. We believe that our team approach is well suited to accomplishing this goal.

The methodology PROVIDENCE Associates will employ has been devised to assure a fair and complete assessment of the Downtown Library as it exists today, including the factors that have contributed both to the library's strengths and weaknesses, and to plan for library services and facilities that will serve the needs of library users well into the future. A thorough evaluation will lead to well-reasoned and realistic service goals and objectives, facility recommendations, technology considerations, and a sound approach to implementation - not merely speculative advice.

As both public and staff input are critical to the ultimate success of the project, it is important to describe each phase of the PROVIDENCE methodology. These phases provide common threads that are interwoven throughout the duration of the planning process. They include:

- ***Phase 1 - Getting Acquainted and Further Understanding***
- ***Phase 2 - Public and Staff Focus Group Discussions***
- ***Phase 3 - Assessment of Physical Plant of the Downtown Library***
- ***Phase 4 - Preparation of a Program of Service for the Downtown Library***
- ***Phase 5 - Determining 20-Year Space Needs for the Downtown Library***
- ***Phase 6 - Preparation of Recommended Alternatives and Cost Estimates for the Downtown Library***

### **PHASE 1 - Getting Acquainted / Data Gathering / Technology Needs**

It is important that all parties "be on the same page" as this important project gets underway. Four tasks are proposed for Phase 1 that will provide for introductions, gathering information and learning more about AADL through the assessment of data, plan documents and more. It is also during Phase 1 that we will assess the District's use of and plans for library automation, networks and technology.

**Task 1.1** - Examine current and past library data. We will first request library data, community demographics, and economic development patterns of the Downtown Ann Arbor District Library service areas prior to our first site visit. The information required for the process will come from many sources. Documents which will be invaluable in providing the PROVIDENCE team with an understanding include, but are not limited to:

- Library organization charts and staff rosters for the Downtown Library
- Library policy and procedure manuals
- Usage statistics and collection inventories for the last five years

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- Short and long-range planning documents and reports for the last five years
- District and regional planning documents and demographics for the current and potential new service areas that make up AADL
- Inventory of technology, hardware, software and connectivity currently used by AADL
- As built plans for the Downtown Library facility.

**Task 1.2** - Become well acquainted with the AADL. The PROVIDENCE team will need to be well acquainted with the current direction of the AADL in general and the Downtown Library specifically. We intend to gain this understanding with a review of relevant planning and reporting documents described above and from a “kick-off” telephone meeting -- conference call -- with the AADL staff and others to be determined in consultation with Ms. Isenstein.

Deliverables - Summary report of our review of the planning documents and conference call with staff.

PROVIDENCE Staff Involved – Isenstein, Alsip, Bolek, Henes, Garvey

AADL Responsibilities - Provide requested documents, participate in proposed conference call, designate principal Library contact person who will manage this project including telephone number, e-mail address, etc.

**Task 1.3** – Gain a thorough understanding, through discussion with the District’s IT administrator of AADL’s Technology and Network for current and future needs, challenges and opportunities for enhancing access to and use of library services by communities served.

PROVIDENCE Staff Involved – Isenstein, Garvey, Bolek

AADL Responsibilities – Provide PROVIDENCE with requested documentation, assist and meet to discuss current and future District library automation and technology services needs.

## **PHASE 2 - Public and Staff Focus Group Discussions**

This is the all-important public input phase of the project. The AADL serves a diverse and growing community. There are undoubtedly many different points of view as to what services should be offered by the Downtown Library, which ones are of greatest importance, what kind of technology is needed, etc. The Focus Groups will enable us to systematically gather this critical input and in combination with your strategic plan, help us refine a Program of Service for the Downtown Library. This information will then be used in combination with demographic data to appropriately size the Downtown Library for at least the next 20 years. Laura Isenstein will take the lead for our team in this phase of the project.

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While the exact mix of focus groups will be a matter of discussion with the Library, we would typically general user sessions in each of the District's service areas. We also recommended facilitating sessions comprised of particular "targeted service populations" of importance in the area. Target service populations in this context are specific segments of the library's customer base. For example, there could be a focus group involving parents and caregivers of young children. Another session could involve senior citizens, another a group of middle school students and/or teens, and yet another a session involving owners downtown businesses. Determining both the target or affinity groups and the schedule will be achieved in consultation with AADL's administration.

The AADL staff will be asked to assist in the selection of individuals to participate in the focus groups. We also believe that the Library should consider conducting at least one focus group session in a language other than English, if there is a significant population of people for whom English may not be the primary language.

There will be between 6 and 8 focus groups consisting of general user and target populations. There should be at least two staff focus groups and one with the Library Board, Friends of the Library, etc. We propose a focus group or interviews, either in person or by phone, with approximately 10 key community stakeholders who are influencers within the Library District as identified by AADL. There will also be staff interviews with Downtown Library department heads as identified by the Administration.

A description of tasks follows.

**Task 2.1** – Determine, in consultation with the client, the exact number of focus groups, their composition, logistics, and questions to be asked at each discussion – public, Board(s), and staff. Concurrently, determine the logistics for the Town Hall Meetings.

**Task 2.2** – Determine, in consultation with client, the focus group meeting schedules.

**Task 2.3** – Conduct the focus group discussions including participant completion of the newly revised PLA Library Service Function rankings.

**Task 2.4** – Prepare written notes and conclusions, include Library Service Function priority rankings.

**Task 2.5** – Prepare an overall summary report of the Focus Group discussions and, the Library Service Function rankings.

These five tasks will be used to help us prepare the Program of Service for the Downtown Library. The Task 2.5 report will be included as an appendix in the final plan document.

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Deliverables – Public, Board(s), and Staff Input Summary Reports and recommendations for current and future service areas based on geography and demographics.

PROVIDENCE Staff Involved – Isenstein and Alsip

AADL Responsibilities - Provide names of persons and/or organizations to invite to Focus Groups, issue invitations, schedule location(s), extend invitations, record RSVPs, issue reminders, and provide appropriate refreshments.

### **PHASE 3 – Assessment of physical plant of existing Downtown Library Facility**

Working hand in hand with Providence, Cornerstone Design/Holzheimer Bolek Architects, will assess the current “as-is” building condition. Cornerstone will engage the assistance of local engineers to ensure the expertise needed for a thorough assessment of the building. Through review of existing building plans and on-site investigation, materials and assemblies will be investigated to determine adequacy, service life expectancy, past maintenance, repairs, and upgrades. The physical property will be reviewed for compliance with the Michigan Building Code, Americans with Disabilities Act, and Life Safety Codes. The structural system will be evaluated for integrity and the building plans notes will be reviewed to determine if the original structural design provided extra capacity for additional loads. Mechanical, electrical, and plumbing systems will be examined for adequacy, service life expectancy, past maintenance, repairs, upgrades, and replacements. All building contents including furnishings, equipment, shelving and collections will be inventoried, surveyed and shown on plans.

The facilities assessment will survey the current state of the Downtown Library structure. The degree of assessment for the building will be determined through discussions with AADL staff. This phase will occur simultaneously with Phases 1 and 2. The following building systems will be surveyed unless otherwise negotiated with the client:

- Roofs
- Drainage systems
- General structure
- Building openings
- Finishes
- HVAC
- Plumbing
- Electrical
- Building Code, Life Safety and ADA

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A report will be generated for each facility that will:

- Assess the building systems
- Discuss the need for replacement or repair
- Recommend solutions and establish order of magnitude costs

**Task 3.1** – Review documentation drawings and records from AADL regarding the existing Downtown Library.

**Task 3.2** – On site surveys of the existing Downtown Library to include:

- Roofs
- Drainage systems
- General structure
- Building openings
- Finishes
- HVAC
- Plumbing
- Electrical
- ADA and Building Code compliance.

**Task 3.3** – Develop reports regarding above items.

**Task 3.4** – Make recommendations based on these findings as to whether to

- Maintain the facility as is
- Renovate the facility without expansion
- Renovate and expand the facility
- Relocate the library to an existing building at another site
- Construct a new library on the same site
- Construct a new library at another site.

Deliverables – Draft report, final report including order of magnitude, and cost estimates.

PROVIDENCE Staff Involved: Rich Henes, Cornerstone Design and their selected expert engineers.

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#### **PHASE 4 - Preparation of Program of Service**

As mentioned previously, *PROVIDENCE Associates LLC* believes that the required size of any library building can only be quantified once the program of service has been determined. Services include everything the library offers or needs to offer to meet the be responsive to its customers. We are seeing smaller reference collections, non-fiction collections and significantly fewer years of periodical back files as library technology and electronic resources for both public and staff continue to develop and change rapidly. Media now accounts for the highest increase in circulation in public libraries today. The “virtual” user is increasing and accessing library resources and services remotely from home, school or business. Public libraries today are often viewed as the “third place” in the lives of its customers, the place they want to be when they are not at work or home. The public library is becoming the community’s ‘gathering” place offering comfortable seating, multiple meeting spaces, and engaging program offering appealing to a variety of age groups. The information learned from all the methods of community input will help identify services that need to be enhanced, added or those that are no longer needed.

For example, if the Program of Service calls for larger or more meeting rooms for use by community groups; for teen areas, and group study spaces, then sound library space planning guidelines (which we have developed over the years) can be utilized to determine the net, the net assignable, and the building gross square feet for such a space within the larger facility.

Therefore, the Phase 4 tasks are designed to develop the Program Plan of Service for Ann Arbor Library District for the next twenty years. The five tasks are:

**Task 4.1** – Review with Library the concerns and issues expressed by the general public and the staff during Phase 2 and discuss trends that have the potential to impact the Downtown Library’s service in the future e.g. technology, early childhood literacy, RFID inventory control, county economic development, potential growth of county, parking, etc. Review and confirm (or revise) Library’s mission statement, vision, goals and objectives based on all data and input gathered to this point.

**Task 4.2** – Draft a Program Plan of Service for the Downtown Library and send it forward to the AADL for review.

**Task 4.3** – Review the draft Plan of Service on site with AADL at least one week after receipt of the document by Library Administration.

**Task 4.4** – Make all needed changes in the draft document following the review.

**Task 4.5** – Prepare the final Program Plan of Service report.

As with the overall Public and Staff Input Summary Report, this report will also be appended to the Final Study Report.

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Deliverables - Assessment of current and library service areas and demographics and the recommendation of revised and new library service areas based on demographic projections for the next 20 years. The Program Plan of Service (draft and final) will include a clear statement of library service guidelines.

PROVIDENCE Staff Involved – Isenstein, Alsip, Garvey

AADL Responsibilities – Provide input via staff focus groups and interviews and review draft report. Provide any additional data or information as requested by the consultants.

### **PHASE 5 – Determining Downtown Library Space Needs**

Phase 5 tasks will focus upon the space needed for services and programs to be housed in and offered by the Downtown Library. A Space Needs Requirements process will provide the necessary information to determine the space requirements for each program and service to be provided in the library facilities. Combined with the findings and recommendations from the physical assessment of the existing buildings, this information will be used to prepare the initial suggestions for the ***Downtown Library Facility Plan***.

The Space Needs Requirements will provide an informed look at least 20 years into the future regarding space needs for the facility based on the agreed upon plan of service. For instance:

- How much space is needed to adequately house the collections and information technologies at least for the next 20 years
- How much space is required to seat library customers for the different types of services offered
- What are the space needs for staff in various workrooms and offices
- How many seats and how much space is needed for additional meeting/programming rooms and small group study rooms
- How many parking spaces will be needed to support the expanded size and usage projected for each library facility
- What is the relationship of current available space to space needs projected for the future?

Our Space Needs Requirements process starts with determining current (year 2007) space needs, and then projects at least 20 years forward in roughly five-year increments beginning with 2010 and concluding with 2030. This report becomes an appendix to the Study Plan. An example of our space needs requirements spreadsheet is to be found in Attachment B.

The Space Needs Requirements will be translated into a detailed performance specifications for reconfiguring, expanding, or replacing the Downtown Library based on

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the physical assessments and recommendations from Phase 3. Very rough cost estimates will be provided for each alternative recommendation at this time. The Space Needs Requirements will be an effective educational tool, and the foundation for seeking buy-in for the plan from library users and decision-makers.

Utilizing the written building program developed by Providence, HBA we will create graphic plans showing possible solutions to the projected needs. First with the development of plan vignettes which show all components necessary within each sub category of the program, then with overall building plans showing collection organization and building spaces together with their adjacencies. We will explore options to maximize utilization of the existing building and site. Should the existing building and site be found to be inadequate to meet projected needs other expansion options would be explored and possible solutions presented in the final report.

The specific tasks are:

**Task 5.1** – Prepare a draft of Space Needs Requirements for the Downtown Library and submit to Peter Bolek for review and to Joe O’Neal of O’Neal Construction for cost estimates as related to the southeastern Michigan construction climate and his direct experience in construction of branch libraries for the AADL.

**Task 5.2** – Present the space needs requirements, justification, and cost estimates to representatives of AADL, library customers, and other interested parties.

**Task 5.3** – Identify changes to be made in the space needs requirements based upon presentation and discussions.

**Task 5.4** – Prepare the first draft of the Study Report. The methodology we have followed in programming library buildings large and small throughout our 27-year history is to always first prepare a draft Plan statement and followed by a thorough review with our clients. The Plan is such an important document that AADL, and the users of the facility, must be as sure as possible that the Plan is right for them in their desire to deliver modern library services from a Downtown Library location.. The is best way we know to gather facts, listen very well, and work with you until the Plan is embraced by AADL and its customers.

A general description of spaces within the building will be drafted. We refer to these as the Assignable Spaces, "assigned" to a particular function such as Children's Services, as opposed to non-public space that supports the overall building, such as a mechanical equipment rooms, hallways, etc. The Assignable Spaces section of the Plan will provide:

- A description of functions and adjacencies (or proximity) for maximum efficiency
- General square footage requirements based on size of population



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- Occupancy level
- Preliminary listing of type of furniture and equipment,
- Shelving, filing, and other storage needs
- Seating capacity and/or work surface requirements, by type
- Staff workstations
- PCs, peripherals, and printers
- Other miscellaneous furniture and equipment.
- Information technologies and telecommunications
- Exterior and interior considerations, such as parking, and ADA accessibility,

**Task 5.5** – Meet with AADL and its Board to review and discuss in detail, the draft Study recommendations. Changes will be identified and made accordingly. If desired, as an additional service, a district-wide Town Hall Meeting may be held before the Study is finalized and adopted. All persons who participated in the Focus Group discussions, stakeholder sessions, and the general service area communities would be invited to this meeting to be informed of the consultants' recommendations and provide feedback related to those recommendations being proposed for the Downtown Library.

**Task 5.6** - Prepare the Space Needs Report. Once the total team has had an opportunity to review the draft report we will proceed to make any needed changes in the draft.

Deliverables – Space Needs Requirement report (draft and final) that will include:

- Statement of terms, definitions and guidelines and assumptions used in analyzing library spaces
- Analysis of:
  - square footage allocations at each library as an expression of total net square feet; total net assignable square feet, and total building gross square feet
  - physical plant condition of each facility
  - current and projected space needs for personnel, collections, equipment, program space, seating and parking for all existing locations based on sound building programming standards.
- Guidelines for optimal selection of sites for new library, if applicable

PROVIDENCE Staff Involved – Isenstein, Alsip, Bolek, Garvey

AADL Responsibilities - Review draft Space Needs Assessment and provide feedback.

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**PHASE 6 – PREPARE AND PRESENT THE STUDY FINDINGS AND  
RECOMMENDED OPTIONS, COMPLETE COST ESTIMATES.**

At this juncture, HBA in consultation with PROVIDENCE will prepare and present the entire Study Findings and Options/Alternatives for the Downtown Library along with cost estimates provided by Joe O’Neal to the Library Board for approval.

**Task 6.1** Prepare graphic plan vignettes illustrating the various options for meeting Main Library service and space needs for the next twenty years along with corresponding cost estimates for each scenario. See Appendix D for samples.

- Site Development Costs, if applicable
- Construction Costs
- Furniture and Equipment
- Information Technology
- Moving and storage, if applicable
- Proportional Costs, including
  - Planning Consultant Fees
  - Design Consultant Fees
  - Testing and Administrative Fees (Owner's Costs)
  - Design and Construction Contingencies

**Task 6.2** Present recommended options to AADL for review, discussion and consensus.

**Task 6.3** Prepare final draft of facilities assessment, findings and recommended options for meeting the 20-year service and space needs of the Downtown Library

**Task 6.4** Present summary of findings and options to AADL Board, Staff, and community according to direction of the AADL.

Deliverables – Graphic Plan vignettes of options, Cost estimates of each options, visual presentation of the final draft of the Findings and Recommended Alternatives and cost estimates for each.

PROVIDENCE Staff Involved – Isenstein, Alsip, Bolek, Garvey, Henes and O’Neal

AADL Responsibilities – Assist by scheduling the session and providing projection equipment to accommodate a PowerPoint presentation.

**Proposed Time Table for Completion of Work**

**Phase 1** February 19 – March 2, 2007

**Phase 2** March 5 – April 6, 2007

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<b>Phase 3</b>	<b>March 1 – 30</b>
<b>Phase 4</b>	<b>April 9 – April 23, 2007</b>
<b>Phase 5</b>	<b>April 23 – May 11, 2007</b>
<b>Phase 6</b>	<b>May 14- June 1, 2007</b>

**3. Description of past work illustrating similar studies and projects, including copies or excerpts from at least two comparable space studies and/or building programs.**

**HOWARD COUNTY LIBRARY, COLUMBIA, MD**

Between March and October 2004 we were engaged in developing a twenty-five year Comprehensive Facilities Master Plan for this suburban library system located between Washington, D.C. and Baltimore, MD. While the focus of this effort was projecting space needs, the process included significant elements of strategic planning. We facilitated focus groups with public, staff, community leaders and Library Board, engaged in detailed mapping and demographic analysis of each of six existing libraries, benchmarked the Library with its peers in areas of usage, assessed the available space of each building and presented our findings and recommendations to the Library Board, public at large and elected officials. A special aspect of the project was writing a full scale building program for a proposed new combined Miller Branch Library and Ellicott City history center totaling 89,000 SF. In July, 2006, the County approved funding to purchase land on which to build this facility.

PROVIDENCE Team members for this project were Laura Isenstein, Richard Waters, James Alsip, Linda Miller and Edmeades-Stromdahl Architects/Engineers Ltd. (Edmeades services involved assessing the structural, mechanical, electrical and physical integrity of all existing facilities.)

Please Contact:

**Valerie Gross**, Library Director, 6600 Cradlerock Way, Columbia, MD 21045.4912.  
Telephone 410.313.7750, e-mail [grossv@hclibrary.org](mailto:grossv@hclibrary.org)

See Appendix B – Final Power Point Presentation to County Administrator and Community

**YUMA COUNTY LIBRARY DISTRICT, YUMA AZ**

Beginning in 2003, for this large (geographically) county we conducted a countywide study of services and facilities. We facilitated focus groups throughout the county, administered an in-library survey throughout the system, and held several meetings with a large library planning committee comprised of Board, Friends, staff, and

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community members. Our final report was presented to the Yuma Board of Supervisors in 2004. In 2005 residents of Yuma County approved by 54% a \$53.7-million bond for the library system, which would pay to convert the current Downtown Library into a branch, construct a new 80,000-square-foot central facility, expand two existing branches, and build two new ones.

Currently, Laura Isenstein is serving as a consultant to the Library's architects, VCBO Architects of Salt Lake City, UT and the Library District for the programming and design of the new Downtown Library and one of the branches that is a joint use facility with several other County departments.

Please Contact:

**Susan Evans**, Library Director, 185 S. Main, Yuma, AZ 86364.  
Telephone 928.782.1817 X 104, email [sevans@yumalibrary.org](mailto:sevans@yumalibrary.org)

See Appendix C – Focus Group Summaries and Space Needs Requirements for Main Library

#### **4. Resumes of proposed consultant team.**

For this project we have assembled a team of six outstanding individuals who bring experience:

- a. with Michigan libraries,
- b. in leading public libraries in new service and facility models,
- c. as nationally recognized leaders in the transformation of public library service for the 21<sup>st</sup> century,
- d. in library automation and in technology and network needs of public libraries assessing library infrastructure, planning for renovation and expanding of existing libraries, and constructing new libraries.

Complete resumes for each team member are found in Appendix E

**Laura Isenstein**, President of PROVIDENCE Associates will manage the project and will serve as Principal Consultant. She will coordinate all aspects of the scope of work and will be the “contact person” for the AADL. Laura will participate in all aspects of the project, including presentations of draft and summary information to AADL. Laura brings over thirty years of public library experience to this project including significant experience in facility needs assessments for Main or Central libraries.

**James Alsip**, Associate Consultant will assist with focus groups facilitation and stakeholder interviews and will engage in discussions and overall assessments. Jim retired as the Director of the Grace A. Dow Memorial Library in Midland, Michigan. He is familiar with Alden B. Dow buildings and with the general Michigan public library arena.

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**Peter Bolek**, Principal, Holzheimer Bolek Architects will take the Space Needs Requirements and work with PROVIDENCE consultants to develop a series of recommended scenario/options for the Downtown Library including cost associated with each option. He will create a number of design vignettes to demonstrate creative use of public and staff spaces required for optimal service delivery from the Downtown Library for the next 20 years.

**Toni Garvey**, Associate Consultant, will assist with assessing services and providing ideas and approaches for new ways to deliver services. Toni is the director of the Phoenix Public Library which includes the Burton Barr Central Library. Toni is a

former PLA President and is Library Journal's 2004 Librarian of the Year. She serves on the Board of the American for Libraries Council. Toni is very aware of the innovative service approaches of AADL.

**Richard Henes**, Principal, Cornerstone Design will provide all services related to the assessment of the current facility from a structural, engineering, system and physical integrity perspective. He will identify challenges and opportunities specific to the existing Downtown Library building.

**Joe O'Neal**, Owner, O'Neal Construction in Ann Arbor will provide construction cost estimating services for the various recommendations provided in the report. Mr. O'Neal has owned and operated O'Neal Construction for over 40 years and has been the construction contractor for at least two of the new branch libraries for the Ann Arbor Library District.

**5. Assessment of expected support from staff of AADL, including amount of time for meetings.**

AADL staff will need to provide the consultants with requested documentation, usage data and other information identified in the various task listed under project methodology. District staff will identify and invite focus groups participants and provide space, refreshments and token of appreciation to those participants. In addition, they will be asked to identify stakeholders to be interviewed.

We would ask the District to appoint one individual to be the point of contact for the project to ensure effective communications between the consultant project manager and the client.

District staff essential to the project will need to be available for mutually scheduled meeting and presentations.

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**6. Cost proposal including # of days and fees for each consultant, number of proposed site visits, estimated travel and reimbursable costs.**

The PROVIDENCE team proposes to devote 600 hours of our professional time for this very important project. Of that total, approximately 214 hours or 27 days will be spent on site, and 386 hours or 48 day off site. The Library professional contingent of the team will make seven (7) visits. HBA and Cornerstone will make a total of 6 trips.

The total proposed *not to exceed* cost proposal for this project is \$72,860. Of this total 85 percent is dedicated to professional services and the remaining 15 percent accounts for travel related, clerical and communications costs.

Professional Services	\$62,600.00
Travel Expenses	\$8,590.00
Clerical and Communications	<u>\$1,670.00</u>
Total Cost	\$72,860.00

As has been the long-standing policy of PROVIDENCE Associates, we are always willing to negotiate proposed costs with our prospective clients. A detailed breakdown of our fee proposal follows.

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**Professional Fees and Expenses**

PROVIDENCE Associates LLC proposes the following *not to exceed* Budget for the Ann Arbor District Library Downtown Library Needs Assessment.  
As with all of our scope of work and fee proposals, these are subject to negotiation.

activity	Hours off-site	Hours on-site	Total Hours	hourly rate	total fees	airfare	travel expenses	other expenses*	total expenses	Total fees/ expenses
<b>Downtown Library/Community/Staff Analysis</b>										
Phase 1 Kick-off, Gathering & Analysis of Data	20	0	20	\$90	\$1,800	\$0	\$0	\$120	\$120	\$1,920
Phase 2 Focus Groups (two consultants)	36	24	60	\$90	\$5,400	\$660	\$1,790	\$35	\$2,485	\$7,885
Phase 2 Key Staff & Stakeholder Interviews (two consultants)	12	8	20	\$90	\$1,800	\$0	\$0	\$10	\$10	\$1,810
<b>Facility Assessment</b>										
Phases 3&5 Existing Conditions & Scenario Planning**	130	130	260	\$120	\$31,200	\$0	\$2,300	\$1,150	\$3,450	\$34,650
<b>Plan of Service</b>										
Phase 4 Library Mission, Roles & Goals Review	20	0	20	\$90	\$1,800	\$0	\$0	\$10	\$10	\$1,810
Phase 4 Library Services/Program Plan & Review	40	16	56	\$90	\$5,040	\$660	\$780	\$45	\$1,485	\$6,525
<b>Twenty-Year Space Needs Projection and Program Statement</b>										
Phase 5 Space Needs Requirements Spreadsheet	16	0	16	\$90	\$1,440	\$0	\$0	\$25	\$25	\$1,465
Phase 5 Building Program Statement & Review	30	8	38	\$90	\$3,420	\$330	\$470	\$110	\$910	\$4,330
<b>Draft Final Report, Recommended Options &amp; Cost Estimates</b>										
Phase 6 Recommended Options-Graphic Vignettes and Cost Estimates for Each**	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Phase 6 Cost Estimates for Each Vignette	\$0	\$0	\$0	\$0	\$3,500	\$0	\$0	\$0	\$0	\$3,500
Phase 6 Review of Options	12	8	20	\$90	\$1,800	\$330	\$470	\$15	\$815	\$2,615
Phase 6 Final Draft Downtown Library Study & Recommendations	32	0	32	\$90	\$2,880	\$0	\$0	\$100	\$100	\$2,980
Phase 6 Present Final Draft of Findings & Options	20	8	28	\$90	\$2,520	\$330	\$470	\$50	\$850	\$3,370
TOTALS	368	202	570		\$62,600	\$2,310	\$6,280	\$1,670	\$10,260	\$72,860
<b>PROPOSED "NOT TO EXCEED" TOTAL BASE BUDGET (before facility planning details)</b>										

\* Communications, photocopies, clerical

\*\*Fixed Price for HBA and Cornerstone Design Services