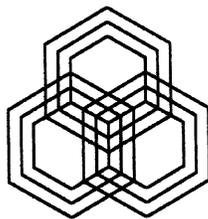


Proposal for Service

prepared for the
Elm Grove Public Library
Elm Grove, WI



Library Planning Associates, Inc.

P.O. Box 406
Normal, IL 61761

309.846.2836
www.libraryplan.com

Introduction to Library Planning Associates, Inc.

Name: Library Planning Associates, Inc
Address: P.O. Box 406
Normal, IL 61761
Lead consultant: Anders C. Dahlgren
anders@libraryplan.com
309-846-2836

Library Planning Associates, Inc. was established in 1984 to provide planning support to local libraries. In order to deploy operating or capital resources wisely, a library needs a road map, needs an understanding of service options and priorities. LPA provides that guidance. Our planning efforts are rooted in the pragmatic assessment and evaluation of library service needs and the projection of actionable future service goals, which become the basis for the library's space needs.

An Emphasis On Library Service

While LPA is often engaged as a library starts to consider building improvements, all our studies focus on the *services* the building needs to house. As planners and librarians, LPA's staff training and expertise emphasizes the assessment of services offered and how those services determine and condition a library's space needs.

A Tailor-Made Approach

Recognizing that every community has different needs and priorities, LPA tailors its methods to the specific requirements of each setting. By developing a final workplan in concert with the library, we assure an effective, economical method and outcome.

Leadership

LPA's founding principal, Anders Dahlgren, has been active in professional associations at the state, national and international levels, focusing his energies on units and committees that deal with long-range and facilities planning. While on the staff of the Wisconsin state library agency, he wrote *Public Library Space Needs – A Planning Outline*, one of the core contributions to the literature on library space planning.

LPA’s planning studies are often a precursor to a library’s efforts to improve or expand its facilities. A successful building plan must be grounded in an understanding of the *service goals* the library aspires to. A building plan grows from the resource and service inventory the library should provide to meet its community’s needs. Every examination of a library’s space needs necessarily begins with an assessment of its library service goals. Expanding the library is not just about making the building bigger, it’s about making sure the building will support the right balance of resources and services for the community the library serves. Every library can and should seek its own proper balance.

For the Elm Grove Public Library’s facilities assessment study, LPA founding principal Anders C. Dahlgren will be the lead consultant. He will be the library’s primary contact and will be responsible for coordinating planning activities with the library. He will conduct all data gathering efforts, assimilate and distill the information gathered, prepare recommendations and draft the report on the library’s service goals and space needs.

The Library of Hattiesburg, Petal & Forrest County (Hattiesburg, MS)



Overview / Scope

The Elm Grove Public Library serves the Village of Elm Grove and surrounding areas. The 2020 census reports the current population of the Village at 6,513. According to the latest public library dataset released by the WI state library agency, in 2019 the municipal population was 5,884, which suggests a prospect for future growth. According to state library agency data, Elm Grove’s municipal population represents 97% of its effective service population (reported as the “extended service population” in the state agency database).

The library maintains a collection of 64,300+ items – 48,500+ print volumes, 15,700+ nonprint items. In the latest reporting year, the library recorded 109,500 circulation transactions. 109,500 circulation transactions translates to a turnover rate (circulations per item held) of 1.70; nationally, the aggregate rate of circulation per item held is 2.72. 109,500 circulation transactions translates to 18.05 circulations per capita; the aggregate rate of circs per capita nationally is 6.71. The library sponsored 260 programs, drawing 7,500+ attendees – roughly 28 per program. The library’s rate of registration as a percent of population is 77.97%; nationally, the aggregate rate of registration as a percent of population is 53.51%.

The library occupies 9,100+ square feet in the Village Hall building. It’s important to recognize that the space allocation does *not* include meeting and program spaces, but the library does have access to two meeting rooms in the Village Hall building. It’s unclear whether the 9,100 square feet includes any allocation for nonassignable purposes (mechanicals, restrooms, and such), which *would* be included if the library occupied a stand-alone building, but usually in a joint use building, the library allocation does not make any allowance for nonassignable functions.

The core question raised in the library’s Request For Proposal has to do with the adequacy of the existing facility. **The library seeks an evaluation for the optimal use of space to meet the service and resource needs of the community over the next ten years.** This question can be approached from two distinct vectors:

- Given the menu of the optimum resource and service inventory that will be needed to meet the community’s service needs over the next ten years, how much space should the library occupy?
- Given the area available to the library today, what is the optimum blend of resources and services the library should provide?

The following work plan anticipates exploring both of those perspectives: how much space is needed to support an optimum resource and service inventory; and what is the optimum resource and service inventory that can be supported in the existing space?

These core concerns are perfectly suited to an analysis based on *Public Library Space Needs: A Planning Outline*, which was written by LPA founding principal Anders Dahlgren while he was on the staff of the Wisconsin state library agency and published by the Department of Public Instruction. The language used in the RFP (collection space, reader seating space, staff work area space, and so on) suggests that library representatives are already familiar with the *Space Needs Outline*.

In addition, the library's Request For Proposal highlights additional specific concerns, including:

- proposed improvements to the overall current layout
- an assessment of technology capabilities over the next five years
- an evaluation of the current circulation and reference desk configurations

All of the recommendations emerging from this study should and will be based on current best practices in library service.

In response to these concerns, LPA will:

- review existing documentation to garner an understanding of current conditions at the library and in the service community
- visit the library to observe current conditions and experience the space
- interview library trustees, library staff (and, at the library's option, selected local opinion leaders)
- prepare a summary of local library service trends over time to understand how the library has grown and developed in recent years
- conduct a peer comparative analysis, using the combined experience of peer libraries to define service benchmarks that in turn provide insight into the library's current and projected resource and service inventory goals
- report on broad national service trends, which condition any resource and service inventory goals that are established
- prepare recommendations regarding the optimum menu of resource and service inventory goals and the corresponding space needs emerging from the library's service goals
- analyze service capacities within the existing space to define an optimum menu of resource and service inventories that can be supported within the existing space
- make recommendations regarding the use of existing space, technology improvements to pursue, and improvements to the configuration of the

circulation and reference desks

Deliverable

The deliverable is a written report recommending fundamental resource and service inventory goals for the library based on an assessment of community needs. Those recommended service goals form the basis of an estimate of library space need. That estimate of space needs in turn will inform an assessment of options and factors that will condition the library’s ability to meet the recommended space needs. The report will also evaluate resource and service inventory capacities within the existing space, make recommendations regarding use of the existing space, technology enhancements to pursue, as well as improvements to the configuration of the circulation and reference desks.

Calendar / schedule

Assuming award of the commission by mid-November, LPA will be ready to start in earnest no later than December 1. Past experience suggests that year-end holidays can complicate ramping up any project, but staff can use the attached “Checklist of Documentation” to jump-start the process and gather requested documentation as soon as the project is awarded, concurrently with finalizing the contract. The site visits and teleconferences proposed in the following workplan are key benchmarks. They need to be scheduled at a reasonable interval, with enough intervening time to allow all parties involved in the study the opportunity to assimilate and reflect on the preceding discussions and interactions, but not so much time as to lose momentum. This study can easily be concluded within a three to four month window. If local circumstances suggest a shorter window, let’s discuss that prospect.



Workplan

This workplan is organized around a series of opportunities for library representatives (staff and trustees) and the consultant to engage and exchange observations, ideas and possibilities – to gather information, explore findings, develop recommendations, and review and fine-tune those recommendations.

In the pre-pandemic time, these opportunities would take place during in-person meetings held on site. In our current era, some of these opportunities will occur in the context of a site visit – it remains absolutely essential that the consulting librarian be *in the space*, to experience the space – but some of these opportunities will likely morph into teleconferences. LPA will work with the library to determine the best strategies to support these interactions.

Be aware that the sample workplan focuses on what LPA refers to as “internal” resources – direct on-site observations, examination of existing documentation and data resources, interviews and discussion with library staff, trustees, and Friends members. Every planning study LPA has ever conducted has been grounded in this kind of internally-focused examination. The typical library is a data-rich environment and over the course of almost forty years of practice, we have learned that the most effective, efficient way to learn about a library and its community is to plumb existing resources exhaustively.

At the library’s option, these internally-focused efforts can be complemented with “external” data-gathering activities. These may include structured group interviews, public hearings, key informant interviews, surveys, and such. A selection of external data-gathering options is most often incorporated into a study workplan for a community with a history of strong community engagement in community decision-making. Wholly reliable results accrue to internally-focused studies *and* to studies with external engagement component(s). The key is matching the right blend of study strategies with each setting. If external components are of interest to the Elm Grove Public Library, LPA is ready to have that conversation.

Also be aware that, while the following workplan reflects almost forty years of lessons learned as a consulting librarian, LPA understands it is not the *only* way to address the library’s concerns. We are open to additional discussions to fine-tune and re-direct the specifics as may be needed.

Task 1: Review existing documentation

Library staff will be asked to assemble a variety of existing documentation – recent annual reports to the state library, past internal annual reports, long-range planning documents, demographic reports and forecasts, etc. – for the consultant’s review by way of getting acquainted with the Elm Grove Public Library and its service community. A sample checklist of documentation is appended.

Task 2: Local / national trend summary

Annual report data will be compiled into multiple charts tracking the library’s use and development over the last ten years. The consultant will review this data, looking for patterns and trends that may affect the service goals chosen by the library.

A similar summary of broad developments in national service patterns will be compiled, as a means of enhancing our collective understanding of general trends impacting library services.

Task 3: Site visit – introduction / investigation

This site visit provides an opportunity to meet with key library staff (most likely the management team) and begin discussions with staff regarding growth patterns in library use,

resource inventories, etc. A thorough tour of the existing building will be conducted, during which the consultant will be able to gather additional input from more staff. Ideally, one or two additional sessions can be scheduled to gather



input from the staff at large. A meeting with the board should be scheduled as well – or, if such a meeting cannot be scheduled easily, we would seek to reserve a couple time slots during the day when board members could visit the library for an opportunity to share ideas and concerns and aspirations. .

Task 4: Comparative analysis / benchmarking

Using a library statistical database developed by the Institute for Museum and Library Services (IMLS), a comparison between the subject library and other

groups of “peer” libraries will be completed. This analysis defines benchmarks useful in assessing the present condition and possible future goals for the library. We expect to define three peer cohorts – state, regional, and national – in order to triangulate this analysis more effectively. The specific cohorts will be defined in concert with the library during the preceding site visit.

Task 5: Assimilation / resource and service inventory goals

These initial observations and analyses, along with an application of the WI public library standards, will inform a preliminary assessment of broad resource and service inventory goals. These provisional service goals will include an expression of the library’s optimum collection size, the recommended inventory of technology, reader



Poetry Foundation Library (Chicago, IL)

seating, staff work stations and meeting / gathering spaces. This will be assembled into a working paper and conveyed to the library.

Task 6: Teleconference

The consultant will meet remotely with the library director and the library’s management team to review the working paper on preliminary resource and service inventory goals, soliciting any adaptations or additions that need to be made. During these discussions, Anders will facilitate initial brainstorming regarding re-use of existing space, service desk configuration, and more.

At the library’s option, a teleconference with trustees may also be scheduled as well.

Task 7: Assimilation / space needs forecast

The resource and service inventory goals devised in the previous steps become the basis for an estimate of space needs. This will be assembled into a working paper and conveyed to the library.

Task 8: Current space use options

A working paper on current space use options will also be prepared, along with preliminary recommendations regarding technologies and service desks. This working paper will likewise be conveyed to the library.

Task 9: Teleconference

The consultant will meet remotely with the library director and the library's management team to review the working papers previously conveyed to the library. At the library's option, a teleconference with trustees may be scheduled.



Task 10: Prepare service and space needs assessment report

The consultant will use the preceding working papers as the basis for a report on recommended resource and service inventories for the Elm Grove Public Library and the corresponding space needs based on the defined service goals. Based on topics of interest identified during the preceding teleconference, this draft report will also discuss strategic planning issues that emerge from an understanding of the scale and scope of the library's long-term facilities needs. The draft report will be conveyed to the library for review and comment.

Task 11: Site visit – presentation

The consultant will meet with staff to present the draft report, review findings and recommendations, and solicit elements that may need further elaboration and attention. A similar presentation will be made to the board. Additional presentations to other individuals or community groups may be made, as needed and as schedules allow.

This task is described as a site visit, but it may be suitable for another teleconference. At the library's option, that alternative may be explored.

Task 12: Revise and deliver the service and space needs assessment report

Based on commentary received following delivery of the draft report, the consultant will make further edits to the text and deliver the completed report to the library.



Budget

Based on the workplan presented above, time allocations can be made to the respective tasks, and a fee for the study can be established.

| | |
|--|-----------------|
| | Dahlgren |
| <i>Task 1: Review existing documentation</i> | 10 hours |
| <i>Task 2: Local / national trend summary</i> | 8 hours |
| <i>Task 3: Site visit – introduction / investigation</i> | 8 hours |
| <i>Task 4: Comparative analysis / benchmarking</i> | 10 hours |
| <i>Task 5: Assimilation / resource and service inventory goals</i> | 7 hours |
| <i>Task 6: Teleconference</i> | 3 hours |
| <i>Task 7: Assimilation / space needs forecast</i> | 7 hours |
| <i>Task 8: Current space use options</i> | 10 hours |
| <i>Task 9: Teleconference</i> | 3 hours |
| <i>Task 10: Prepare service and space needs assessment report</i> | 18 hours |
| <i>Task 11: Site visit – presentation</i> | 8 hours |
| <i>Task 12: Revise and deliver the service and space needs assessment report</i> | <u>6 hours</u> |
| TOTAL TIME | 98 hours |

The budget is predicated on an estimate of the number of hours required to complete each task. The basic fee is calculated at a rate of \$150.00 per hour. To that basic fee allocations are added for various expenses, including clerical support, travel, and postage / copying / communications. Postage / communications / copying costs anticipate delivering all interim and final reports in electronic form only (pdf files, most likely).

PERSONNEL

| | |
|------------------------|---------------------------|
| Dahlgren: | 98 hours @ \$150 per hour |
| Clerical: | 22 hours @ \$25 per hour |
| TOTAL PERSONNEL | \$15,250.00 |

TRAVEL

| |
|----------------------------|
| Task 3: Site visit |
| Mileage @ \$225 |
| Lodging @ \$150 x 2 nights |

| | |
|--|-------------|
| Meals & misc @ \$50 x 1 day | |
| Total site visit #1 | \$575.00 |
| Task 10: Site visit | |
| Mileage @ \$225 | |
| Lodging @ \$150 x 2 nights | |
| Meals & misc @ \$50 x 1 day | |
| Total site visit #2 | \$575.00 |
| TOTAL TRAVEL | \$1,150.00 |
| POSTAGE / COPYING / COMMUNICATIONS | \$100.00 |
| <hr/> <hr/> | |
| TOTAL NEEDS ASSESSMENT BUDGET | \$16,500.00 |
| <hr/> <hr/> | |



Durango Public Library

Personnel

As the founding principal of Library Planning Associates, Inc., Anders Dahlgren brings to your project a depth of relevant experience that may be unparalleled. Given that the Space Needs Study hinges on an assessment of library service goals, perhaps his most relevant qualification is the fact that he is a librarian, which means he's trained to assess and evaluate library services. He has worked in libraries for almost 50 years. He has been a librarian for almost 45 years, and he has worked as a consulting librarian for more than 35 years, conducting just the kind of examination the Elm Grove Public Library is asking after.

As a consulting librarian, he has worked primarily with public libraries primarily in the Midwest, but his portfolio extends to libraries of all types – school, academic and special – in all corners of the country and abroad. He has worked with more than 150 libraries, planning services and facilities in settings ranging in size from 2,000 square feet to more than 400,000 square feet. (During his tenure with the Wisconsin state library agency, he visited and worked with more than two-thirds of the state's libraries.) That kind of wide ranging client experience is perhaps the most important single asset a consulting librarian can offer.

Moreover, throughout his career, he has participated actively in the workings of professional associations relating to library facilities planning. Association work affords the best forum for exchanging ideas and keeping current. He has served on committees in ALA's Building and Equipment Section since 1982, currently completing service on the Library Building Awards Committee. He has been elected by his peers in the Building and Equipment Section to the BES Board three times, including once as Chair. And he served two terms as an ALA delegate to the Standing Committee on Library Buildings and Equipment in the International Federation of Library Associations. Anders's CV follows.



Madison (WI) Public Library



Anders C. Dahlgren

President and Founding Principal
Library Planning Associates, Inc.

Anders Dahlgren is an acknowledged leader in planning library services and spaces. He founded Library Planning Associates, Inc. (LPA) in 1984 and has since consulted with more than 150 libraries across the country and internationally. As the building consultant for the Wisconsin State Library (1984 to 1998), he worked with more than two-thirds of the state's 380+ libraries. He has planned libraries ranging in size from less than 2,000 square feet to almost 400,000 square feet and prepared program for more than 5 million square feet of library space.

Education

University of Iowa,
B.A. in English,
1976

University of Illinois,
M.S. in Library
Science, 1977

University of
Wisconsin,
Certificate of Prof'l
Development
Program in Library
Management,
1990.

Professional Background

July 1984 to date
Library Planning
Associates, Inc.
Founding principal
June 1996 to Dec 2006
Dominican
University Library
School
Adjunct Professor
Oct 1985 to Dec 2002
University of

Among his accomplishments and contributions:

- 14 years on the staff of the Wisconsin state library agency as the state's recognized authority on long-range and facilities planning
- created *Public Library Space Needs: A Planning Outline* while on the staff of the Wisconsin state library agency (the most referenced library space planning tool, often referred to as "the Wisconsin model," it became the basis for the space planning methodology recommended by the International Federation of Library Associations)
- two projects recognized by *Library Journal* as Library of the Year – The Blair Library (Fayetteville, AR) and the Laramie County Public Library (Cheyenne, WY)
- three projects recognized by *Library Journal* as a New Library Landmark – Poplar Creek Library District (Streamwood, IL), Durango (CO) Public Library, Madison (WI) Public Library
- two projects recognized by the American Institute of Architects with its Honor Award – Cambridge (MA) Public Library, the Poetry Foundation (Chicago); the Poetry Foundation headquarters was also cited by *Architectural Record* in its recent list of the "Top 125 buildings" of the last 125 years

Wisconsin
Instructor
Oct 1984 to July 1998
Wisconsin Division
for Library Services
(state library)
Consultant for
Public Library
Construction and
Planning

- elected by peers three times to the Executive Board of the American Library Association’s Building and Equipment Section (BES)
- twice elected to the Standing Committee on Library Buildings and Equipment in the International Federation of Library Associations (IFLA)
- named by the American Library Association five times to serve as a juror for the Library Building Award, jointly sponsored by the American Library Association and the American Institute of Architects to recognize excellence in library design – in the history of the LBA program, no one has served on this jury more

Selected project experience

Jackson-Madison County Public Library, Jackson, TN
Service and space needs assessment study. Delivered 2020.

Joliet Public Library, Joliet, IL
Service and facilities conceptual study, updating and re-deploying services in the library’s two buildings – the 74,000 square foot Ottawa Street facility and the 36,000 square foot Black Road facility, delivered 2018. Building program describing renovation of the Ottawa Street facility delivered 2019.

Scarborough Public Library, Scarborough, ME
Service assessment and building program describing an addition to the existing 12,500 square foot building, bringing the gross area to 30,800 square feet. Delivered November 2019.

Peoria Public Library, Peoria, AZ
Service and facilities configuration study for a rapidly growing community in the Phoenix metro area. In association with Engberg Anderson’s Tuscon office. Delivered March 2019.

Fayetteville Public Library, Fayetteville, AR
Building program statement for expansion of main library to

168,000 square feet, in association with MSR Design.
Delivered December 2017.

Jefferson College Library, Hillsboro, MO
Building program statement for renovation of library /
learning center / center for teaching & learning – 32,000
square feet total, in association with TR,i Architects.
Delivered May 2016.

Harper College, Palatine, IL
Programming for remodeling and expansion of the library,
incorporating Student Success Services, the Writing Center,
the Tutoring Center, the Center for Innovative Instruction,
the Center for Adjunct Faculty Engagement, and the Academy
– more than 110,000 square feet total – in association with
Legat Architects. Delivered November 2015.

Cleveland Park Branch, DC Public Library, Washington DC
Building program and plan review for the 25,000 square foot
Cleveland Park Branch, in association with Perkins Eastman
DC. Delivered August 2015.

Barrington Area Library District, Barrington, IL
Multiple projects over 30+ years. In 1988, LPA was engaged
for a needs assessment and building program study, leading to
an expansion designed by Ross Barney Jankowski. In 2002,
LPA examined the feasibility / desirability of developing
branch service. In 2011, LPA led a strategic facilities study in
collaboration with Engberg/Anderson. In 2012, those roles
were reversed and LPA developed program for a renovation
of the existing building as a subcontractor to Engberg /
Anderson's prime. In 2019, LPA again collaborated with
Engberg/Anderson to update the library's facilities master
plan.

References

Jackson-Madison County Public Library

433 E Lafayette Street
 Jackson, TN 38301
 Dinah Harris, director
 dharris@madisoncountyttn.gov
 731-425-8600

In 2019-2020, LPA conducted a service and space needs assessment study for the Jackson-Madison County Public Library. The study defined systemwide resource and service inventory goals, and explored variations in how those resources might be deployed in a single-building service configuration, a main + branch configuration (the library’s present status), and a main + two branch configuration. Based on those variations, space needs at each location were estimated. The library is presently working with city and county officials to acquire needed parcels to realize an expansion.

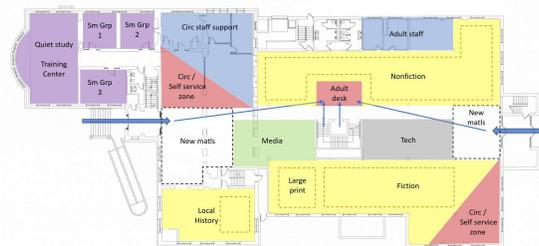
Joliet Public Library

150 N Ottawa Street
 Joliet, IL 60432
 Megan Millen, executive director
 mmillen@jolietlibrary.org
 815-740-2670

In 2018, LPA was selected to conduct a concept plan study. With the support of

Wight & Company, LPA explored strategies to reconfigure existing space at the library’s downtown Ottawa Street location and its Black Road Branch. The goal of the reconfiguration was to deploy resources and services more effectively and create “found” space to develop new services. Based on the findings of the concept plan study, the board voted to proceed with renovation of the Ottawa Street building. LPA developed building program for that 60,000 square foot project and provided plan review support while the library worked on design with its project architect. The project is presently under construction.

OTTAWA STREET BRANCH – BURNHAM BUILDING



Sun Prairie Public Library

1350 Linnerud Drive
Sun Prairie, WI 53590
Svetha Hetzler, director
shetzler@cityofsunprairie.com
(608)825-0900

In 2018, as part of a study team led by FEH, LPA completed a service and space needs assessment study for the Sun Prairie Public Library, identifying essential resource and service inventory goals and the corresponding space needs. This analysis formed the basis for a design charrette facilitated by FEH. As the library’s planning process evolved, questions emerged as to how the possibility of developing a branch or branches in the future might impact space needs at the “main” library. LPA helped staff and trustees develop service scenarios to examine that question. Further questions emerged regarding how adhering strictly to the Dane County Library standards would affect space needs. LPA assisted with that recalibration.

LPA is presently working with the library, as part of an FEH design team, to update the previous planning efforts to reflect the updated census report from the 2020 census. The current planning effort also factors in new service protocols resulting from services in the pandemic age.

DOCUMENTATION CHECKLIST

- * annual reports to the state library agency for 2019 and 2020
- * the library’s mission statement
- * any formal long-range plan / statement of goals & objectives adopted by the library board
- * a copy of the current operating budget
- * current organization chart
- * summaries of any recent community and / or user surveys
- * current floor plans with a furnishings layout
- * any demographic overview for the library’s service area, such as may be available from a county or regional planning agency or whomever
- * available demographic *forecasts* for the community, anticipating population growth (to the year 2040 preferred) as well as notable shifts anticipated within the composition of the community.
- * a map of the community (note location of current library)
- * the current comprehensive master plan for the community indicating how the area is expected to be developed

For documentation available electronically, send files (or URL pointers) to:
anders@libraryplan.com

For any documentation available in hard copy, mail to:
 Anders C. Dahlgren
 Library Planning Associates, Inc.
 P.O. Box 406
 Normal, IL 61761

Bear in mind that LPA is a BIG believer in the Use Whatcha Got School of Data-Gathering. If an item on this list isn’t readily available, don’t make any great effort to dig it up. Just let us know its unavailable and let’s do what we can to work around its absence. If we really do need the errant item, we’ll let you know, and *then* it’ll be time to move mountains!

At the same time, feel free to supplement this list with *any* additional documents you feel would be helpful. The list is rather generic and there may be additional, unique infobits that provide insight into the library or its community. Add on, as you see fit!

