



**Josephine Community Library Foundation**

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## **Library Facilities Master Plan, Phase 2**

### **Request for Proposal**

**July 12, 2018**

Josephine County Library Foundation (JCLF) is requesting a proposal from qualified architectural firms to develop the Josephine Community Library District (JCLD) Facilities Master Plan. This plan will include pre-design packages for four library buildings including assessment of existing structures, cost estimates to remodel or replace buildings, and evaluation of possible building sites.

Rather than a formal procurement process, this RFP is an invitation sent to selected architectural firms.

Josephine County Library Foundation looks forward to receiving your proposal on or before August 6, 2018.

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### **Proposal schedule**

The following are key dates for the JCLF Facilities Master Plan proposals and selection process.

Thursday, July 12, 2018	RFP sent to invited architectural firms
Monday, July 30, 2018	Deadline for emailed questions about proposals sent to Library Director Kate Lasky at <a href="mailto:jobs@josephinelibrary.org">jobs@josephinelibrary.org</a> ; please do not mail or call with questions about proposals
Monday, August 6, 2018	Emailed proposals due at 5 pm PT to Library Director Kate Lasky at <a href="mailto:jobs@josephinelibrary.org">jobs@josephinelibrary.org</a>
Monday, August 13, 2018	Proposal review by Facilities Oversight Task Force complete
August 14-15, 2018	Top-rated candidate interviews conducted
Wednesday, August 15, 2018	Architectural firm selected
Friday, August 17, 2018	Contract awarded and work begins

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## **Background**

The Josephine County Library System was funded and operated by county government until May 2007, when the libraries were all closed due to a county funding crisis.

Later that year, volunteers formed Josephine Community Libraries, Inc. (JCLI), a nongovernmental, nonprofit organization. They raised funds and trained volunteers to reopen the libraries, and from 2009 through 2017, the libraries in Josephine County were supported by donations and volunteer effort.

In May 2017, voters passed a ballot measure to form a library district serving 39,000 residents in the noncontiguous areas surrounding the branch libraries in Grants Pass, Illinois Valley, Williams, and Wolf Creek. The Josephine Community Library District (JCLD) is now funded by a taxing rate of 39 cents per \$1,000 of assessed value for property within the boundaries of the library district. After a six-month startup and transition period, JCLD assumed full library management and operations on January 1, 2018. The district is governed by a five-member elected district board of directors.

Now that stable funding is in place for regular library programs and operations, the robust fundraising operation developed by JCLI has been transferred to the Josephine County Library Foundation (JCLF). The foundation has made library facilities a top priority and is therefore funding the development of this Facilities Master Plan.

Although the district's tax revenues are not sufficient for capital building or renovation projects, the district board has adopted as part of its three-year strategic plan the goal of enhancing library facilities. To achieve this goal, in partnership with JCLF, the district has committed to the development of a Facilities Master Plan which will form the basis of a community capital fundraising campaign.

Phase 1 of the Facilities Master Plan effort has been completed. Library facilities planning firm Penny Hummel Consulting has conducted a service evaluation — including community stakeholder meetings as well as assessments of the building, technology, and collection — of the four library buildings in Grants Pass, Illinois Valley, Williams, and Wolf Creek. The firm has prepared the Josephine Community Library District Facilities Master Plan Phase 1 Report dated June 18, 2018, which is an appendix to this RFP. The report includes facilities recommendations for the four library branches, as well as proposed details for all library spaces.

At its meeting on June 21, 2018, the JCLD Board of Directors endorsed the report's recommendations. The Phase 1 Report will be combined with the architectural firm's Phase 2 work to comprise the final Facilities Master Plan, which is the key deliverable for this project.

The following summarizes the four buildings included in the Josephine Community Library District:

	Built	Square feet	Notes
<b>Grants Pass main library branch</b>	1959	15,470	The children’s library was renovated and modernized in 2016. The building is owned by the county and leased to the district for a nominal fee, under terms that will expire January 1, 2020.
<b>Illinois Valley branch library</b>	1959	4,264	The children’s area was renovated and modernized in 2017. Ownership of the building and land was transferred from the county to the district on January 1, 2018.
<b>Williams branch library</b>	1977	864	This structure is a converted manufactured home and has no plumbing. Ownership of the building was transferred from the county to the district on January 1, 2018. The land is leased to the district by Three Rivers School District.
<b>Wolf Creek branch library</b>	2002	2,594	This is the newest building, built with funds raised by Josephine County Library Foundation. The foundation leases the land and building to the district.

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## Program goal

The four library branches of the Josephine Community Library District are worn down, outdated, and in various levels of disrepair. For the district board to make informed decisions about deferred maintenance, regular maintenance, building lifecycle improvements, renovations, and new buildings, a Library Facilities Master Plan is needed.

The Library Facilities Master Plan will be the result of the Phase 1 needs assessment and initial program specifications and the Phase 2 pre-design package including specifications and costs for renovating or replacing the four library buildings.

With this Facilities Master Plan in place, library leaders will be poised to launch a library capital campaign to raise funds for facilities.

Implementation of the Facilities Master Plan will include the following efforts, which are based on the Phase 1 recommendations:

- Replace the existing Grants Pass library branch building with a new facility at a new location.
- Replace the existing Williams branch building with a new facility at the current location.

- Explore the viability and cost of expanding and renovating the Illinois Valley branch building.
- Evaluate the roof and mechanical, safety, and security systems to identify and prioritize repairs and improvements at the Illinois Valley and Wolf Creek branch libraries.
- Update the furniture and fixtures at the Illinois Valley and Wolf Creek branch libraries.
- Improve the Internet bandwidth and reliability at the Illinois Valley and Wolf Creek branch libraries (not included as part of this RFP's scope of work).
- Analyze the current use of the collection at all four branches, with the goal of maximizing return on shelf space (not included as part of this RFP's scope of work).

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## Scope of work

The architectural firm selected to implement Phase 2 of the Library Facilities Master Plan project will be expected to produce the following deliverables:

- Pre-design package with initial concepts for a new Grants Pass library branch building, including:
  - An estimate of the costs to replace the existing Grants Pass library branch building with a new facility, including furniture, fixtures, and equipment
  - Criteria for site selection
  - Evaluation and recommendation for potential building sites
  - Early general conceptual drawings to be used for community fundraising
- Pre-design package with initial concepts for an expanded and renovated Illinois Valley library branch building, including:
  - A structural assessment of the building which evaluates the roof and mechanical, safety, and security systems to identify and prioritize repairs and improvements
  - An assessment of the viability of expanding and renovating the existing facility, including the size and layout of an addition
  - An estimate of the costs to expand and renovate the existing facility
  - An estimate of the costs to update furniture and fixtures
  - Early general conceptual drawings to be used for community fundraising
- Pre-design package with initial concepts for a new Williams library branch building, including:
  - Working with the property owner Three Rivers School District according to the intergovernmental agreement (currently in development) about the library building placement and boundaries
  - An assessment about the maximum building size and a general concept of building layout on the existing land with existing features

- An estimate of the costs to replace the existing Williams library branch building with a new facility at its current location, including furniture, fixtures, and equipment
- Early general conceptual drawings to be used for community fundraising
- Assessment and estimates for the Wolf Creek library branch building, including:
  - A structural assessment of the building which evaluates the roof and mechanical, safety, and security systems to identify and prioritize repairs and improvements
  - An assessment of the viability of updating the interior
  - An estimate of the costs to update the interior, including furniture and fixtures
- The final Facilities Master Plan, including the assessment and initial program specifications developed by Penny Hummel Consulting as part of Phase 1 of this project, initial building concepts, revisions to the program specifications to reflect the building concepts with drawings, cost estimates, and recommendations for decision points and next steps
- A summary of recommendations, specifications, and costs to library leadership, along with explanations and background for any decision points
- A summary of recommendations for the next steps for the design and construction phases after fundraising is achieved

The selected architectural firm will work with Penny Hummel Consulting, which implemented the stakeholder meetings, assessments, and library program specifications as part of Phase 1 of this project. It's expected that Penny Hummel Consulting will have a separate contract with Josephine County Library Foundation for this work.

After receiving these deliverables, along with information from JCLF about fundraising capacity, the JCLD Board of Directors will decide on next steps, project priority, and sequence to implement the Facilities Master Plan. The first step will likely be to conduct a feasibility study to determine fundraising capacity for the recommendations in the Facilities Master Plan.

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## Available resources

The following resources are available for this project:

- The initial program specifications for the four library buildings developed by Penny Hummel Consulting as part of Phase 1 of this project, detailed in the Josephine Community Library District Facilities Master Plan Phase 1 Report dated June 18, 2018. This report is included as an appendix to this RFP.
- The Facilities Oversight Task Force, which includes two board members each from the Josephine County Library Foundation and Josephine Community Library District and the library director. The committee is responsible for

representing patrons, volunteers, donors, staff, and other library and community stakeholders as it considers library facilities. The task force will review and consider input from the architects and make its recommendations to the JCLD Board of Directors for decisions and approval.

- The library director, along with district staff and volunteers as approved by the library director.
- Josephine County Building Operations and Maintenance department, through the County Commissioners’ library liaison, with details about the Grants Pass, Illinois Valley, and Williams library buildings, their lifecycle issues, and maintenance planning.
- The library district’s three-year strategic framework including vision, mission, values, reputation, position, imperatives (goals), objectives (measurements), and initiatives (activities), adopted by the district board November 9, 2017.

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## Roles and responsibilities

The following identifies the stakeholders and their responsibilities throughout the process of developing the Library Facilities Master Plan.

No.	Activity	Responsible stakeholder(s)
1	Review proposals from qualified architectural firms, conduct interviews as necessary, and recommend the selected firm to the JCLF board for contract approval and the JCLD board for endorsement.	Facilities Oversight Task Force
2	Provide funding for the Facilities Master Plan, enter into the contract with the selected architectural firm, pay invoices.	JCLF Board of Directors
3	Coordinate and manage the project, directing the efforts of and receiving deliverables from the architectural firm, serve as liaison to the Facilities Oversight Task Force.	Library Director
4	Implement the Facilities Master Plan project, producing all deliverables as outlined in the Scope of Work.	Selected architectural firm
5	Complete the draft of the Facilities Master Plan, including initial program specifications (Phase 1) and cost estimates and pre-design packages (Phase 2).	Selected architectural firm and Penny Hummel Consulting
6	Present the Facilities Master Plan to Facilities Oversight Task Force and the JCLD board.	Selected architectural firm and Penny Hummel Consulting
7	Review the deliverables from the architectural firm; report to the JCLF and JCLD boards; make recommendations about the Facilities Master Plan to the JCLD board.	Facilities Oversight Task Force

8	Make decisions regarding the direction of the Facilities Master Plan; review and adopt the Facilities Master Plan; determine next steps.	JCLD Board of Directors
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## Proposal submission

To receive consideration, proposals must be submitted as follows:

1. Proposals should include a cover letter to the attention of the JCLD Library Director Kate Lasky. The cover letter must include the firm name, principal's name(s), email address, address, telephone and fax numbers.
2. Proposals should include a narrative that speaks to the Scope of Work and the Proposal Content and Evaluation Criteria sections outlined in this RFP.
3. A representative of the architectural firm submitting the proposal should be available by phone on August 14 or 15 as scheduled to answer questions from the Facilities Oversight Task Force. Include the contact information and a direct-dial phone number for this representative for scheduling purposes.
4. Proposals must be a single PDF file with electronic signatures as applicable, no larger than 6MB, sent to Library Director Kate Lasky at [jobs@josephinelibrary.org](mailto:jobs@josephinelibrary.org). Mailed, hand-delivered, or faxed proposals will not be accepted. Late proposals will not be accepted.
5. Proposals must be received by email by JCLD by 5 pm on Monday, August 6, 2018. Proposal receipt will be acknowledged by email.
6. All proposing firms will receive email notification regarding the outcome of the review and contract award process by Friday, August 17.

There will not be a pre-proposal conference. Questions received by July 30, 2018 will be answered via email and made available to all responders. Direct all questions to Library Director Kate Lasky at [jobs@josephinelibrary.org](mailto:jobs@josephinelibrary.org).

To learn more, click to visit the [Josephine County Library Foundation](#) web page, [Josephine Community Library District](#) website, the JCLD [Facebook page](#), and JCLD [YouTube channel](#).

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## Proposal content and evaluation criteria

JCLD shall evaluate all qualifying proposals to determine which proposal best meets the needs of the libraries in Josephine County. Top candidates might be contacted for an interview. Proposals should include a narrative that addresses the following information, as JCLD shall make its selection according to this criteria:

**1. Experience of the firm and prior experience with library facilities design: 30 points.**

- Identify the architectural firm principal(s) and provide a professional biography of less than 500 words for each, specifying library facilities design experience within the past five years.
- Describe relevant project examples, preferably for library facilities design, within the past five years.
- List three references with contact information, including other libraries the firm has designed. References will be asked about work schedule adherence, quality of work, flexibility, and responsiveness to client inquiries.

**2. Firm's approach to the facilities master plan: 30 points**

- Describe the approach to producing the deliverables outlined in the Scope of Work including the Facilities Master Plan. Estimate the percentage of the work that will be performed onsite.
- Specify the availability of the firm's staff to complete the Facilities Master Plan, ideally before November 30, 2018 so that community awareness and fundraising can begin before year-end.
- Identify and describe any known or anticipated issues with developing the Facilities Master Plan, the firm's approach to resolving those problems, and any special assistance that will be requested from the district or foundation.

**3. Project timeline and cost proposal: 30 points.**

- Submit a work plan with a timeline of the deliverables and presentations outlined in the Scope of Work; the ideal is to complete the Facilities Master Plan before November 30, 2018, in time to start the capital campaign with an end-of-year fundraising drive.
- Provide not-to-exceed fee estimates for developing the Facilities Master Plan and other specified deliverables. The not-to-exceed fee estimates must detail all fees including travel, telephone, and other anticipated expenses.
- Describe the method to be used in charging for any special request, reports, or broadening of the scope. Indicate how such a request would be handled and the rates.

**4. Proposal submission requirements: 10 points.**

Adhere to the proposal submission requirements specified in this RFP.

**5. Additional information**

Provide any other information that might assist the district in making its selection.

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## Contract terms and conditions

Based on recommendations from the Facilities Oversight Task Force, Josephine Community Library District will select the architectural firm best qualified for this project, and Josephine County Library Foundation will award the contract and pay invoices. The successful bidder and the JCLD library director will then mutually discuss and refine the scope of work for the project and shall negotiate final conditions, compensation, and performance schedule for the subsequent contract.

The contract between the selected architectural firm and JCLF shall include the following terms and conditions:

- The term of the contract will cover the time span for developing the final Facilities Master Plan.
- The Facilities Master Plan and associated deliverables must be complete by the mutually agreed deadline.
- The contract will be with a specific principal, and the engagement may not be subcontracted to another firm.
- The contract will specify whether travel expenses and other out-of-pocket expenses are included in the fee. If such expenses are separate, then the proposal and agreement should stipulate the amount expected, along with any specifics or limitations on the amount of those expenses.
- Should the firm fail to perform the identified scope of work or meet the established performance and quality standards, payment may be reduced or withheld; the firm may be required to perform, at the firm's expense, additional work necessary to perform the identified scope of work or meet the standards; and/or the contract may be terminated and JCLF may seek damages and other relief available under the terms of the contract or applicable law.
- Either party may cancel the contract with a 30-day written notice.
- Materials submitted after a contract is signed shall be subject to the ownership provision of the executed contract.
- The firm will work with various stakeholder entities as follows:
  - Josephine County Library Foundation (JCLF) president, who will award the contract and pay invoices
  - Josephine Community Library District (JCLD) director, who will serve as project manager and liaison
  - Facilities Oversight Task Force, to which the firm will present the Facilities Master Plan for review and recommendations to the JCLD board of directors.
  - Penny Hummel Consulting, which produced the initial program specifications as part of Phase 1 of the project.
  - JCLD Board of Directors, which will hear the presentation of the Facilities Master Plan, review and endorse the plan as appropriate, and determine next steps.

## **Appendix A.**

Josephine Community Library District Facilities Master Plan Phase 1 Report, prepared by Penny Hummel Consulting, June 18, 2018.