

March 13, 2024

AGREEMENT FOR A STRATEGIC FACILITY PLAN LAKE BLUFF PUBLIC LIBRARY

between Board of Library Trustees of the Lake Bluff Public Library of Lake County, Illinois 123 E Scranton Av Lake Bluff, IL 60044 Attention: Renee Grassi, Director and Engberg Anderson, Inc.

8618 West Catalpa Avenue, Suite 1116 Chicago, IL 60656

Engberg Anderson Project No. 243729

Dear Renee,

Engberg Anderson is pleased to submit this proposal for a Strategic Facility Plan. This proposal is based on our current understanding of the project. We ask that you review the scope, schedule and fee proposed and identify any concerns or questions in this regard.

PROJECT UNDERSTANDING

The Library is seeking a Strategic Facilities Plan (SFP) to evaluate options related to (1) maintaining, (2) improving in various ways, and (3) preserving the opportunity to expand the facility at some point in the future. The Library has yet to make a determination as to the best approach to overcoming a presumed shortfall in quantity and quality of space in the current facility. While recognizing the value of previous planning efforts, this SFP is to evaluate the strategic space issues with fresh eyes, develop a tiered approach addressing those needs, and provide comparative cost and performance data to assist the library in determining the best approach to solving the space needs.

A series of grouped investigations and options is envisioned to include:

- 1. Tier 1 Projects Address Aging Mechanical Systems and Accessibility
 - a. Address aging HVAC and electrical system components serving the building.
 - b. Address accessibility issues at the building entry, restrooms, and mezzanine
- 2. Tier 2 Projects Do More with the Existing Space: Service Enhancements Driven by Space Improvements
 - a. Improve/relocate staff workroom
 - b. Move Community Room
 - c. Move public service point(s)
 - d. Improve Children's Library
 - e. Do something with the Museum
 - f. Enhance technology within the building
- 3. Tier 3 Projects Review of Expansion Potential and potential limitations based on the recommendations made in the Tier 1 and Tier 2 groups of projects.

ARCHITECTURE | INTERIOR DESIGN | PLANNING

METHODOLOGY

Engberg Anderson proposes to meet this need by working with the Library to complete a multi-step process leading to a Strategic Facility Plan. Based on the project understanding we propose a series of several on-site workshops. The workshops are envisioned to include sessions with the library's management team, key staff, and trustees as appropriate to the stage of the project. Public engagement can be incorporated at key points in the process to set the stage, gather insights into needs and expectations, solicit feedback on various options, and build awareness and support. We anticipate 4 engagement sessions as part of this process.

Part 1 Programming: Identify strategic space needs to serve the community for the next 10 years

We will conduct a series of discussions with the management team to further the list of issues included above. Various exercises will be used to help imagine and prioritize a range of possible improvements. These exercises may include "Keep, Toss, Create", "Semantic Differentials", "Headlines", or "Pictures from the Future" to help cast a wide net and prioritize the concepts. The Library's previous planning efforts and recent customer comments will be actively used as guides to the discussion.

- Public Sessions as deemed appropriate by the Library (arranged in virtual and in-person forms to support broad participation)
- Staff Sessions (arranged to support participation while maintaining operations)
- Museum Session
- Board Session

The goal of this activity is to define community specific service-based space typologies, sizes & quantities Utilizing the results of the Investigations portion of the study, we will formulate a series of space typologies and sizes to support various parallel, sequential and independent or dedicated use patterns that fit the library's current service model and evolution as the needs of the community change. This will involve discussion of broad trends as well as the local experience with each. Our approach is to acknowledge the relationship of space to patrons:



We will use these discussions to formulate a list of public and staff spaces to support the Library in meeting its mission. Our typical Program of Spaces defines library space use in seven major space categories:

- 1. Arrival | Enter, Orient, Greet, Exhibit.
- 2. Places to Gather | Multi-purpose, large group, flexible, connected.
- 3. Places to Get Things | Showplace for curated collections of various materials and objects
- 4. Places to Do Things | Individual and small or medium group spaces for hands-on learning, social learning, innovation, content creation, incubation.
- 5. Special Spaces | Community specific spaces for the needs of your community. Literacy, food literacy, artist in residence, social services access, economic development, visitor center are examples from other libraries. "Room of Requirement" to support pop-up services, emerging trends, special needs user populations.
- 6. Staff Spaces | Flexible and scalable to respond to changes in services, expertise, work styles, and staffing

shifts, from materials handling to collaborative customer services.

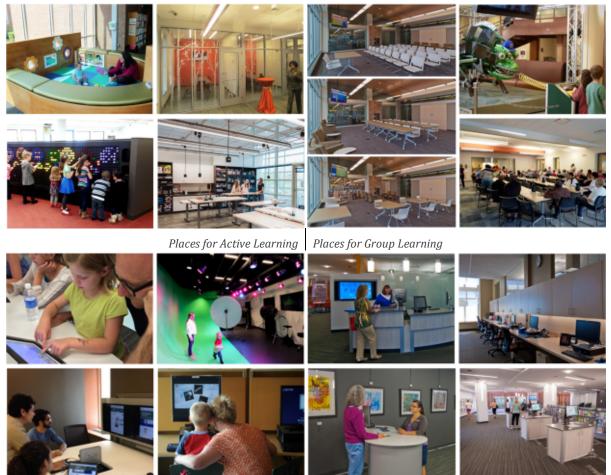
7. Building Support Spaces | Future-friendly infrastructure to support continuing evolution in the services.







Places to Browse, Discover, Discern Places to Sit, Read, Contemplate



Places to Engage Technology Places to Engage Staff

This is the translation of the Strategic Plan into actionable steps for the renovation or expansion of the facility. It will anticipate the continuing impact of patron needs that are diverse, dynamic, and evolving; the general impact of technology. It will recommend furniture, fixtures, and equipment to support these needs.

Part 2 - Facility Effectiveness Assessment

An evaluation of existing space will be a key component of the study. The spaces will be evaluated twice – once in preparation for the initial discussions – and a second time following those discussion to refine the evaluation in light of the newly framed objectives. Along with tours of the building, we envision a conversation with various members of the Library's management team to further our observations of staff and patron behavior.

 We will review the existing layout, condition, character and effectiveness of the library building to determine the how the current facility can be better adapted to emerging and traditional service patterns. The evaluation will include flexibility, technology, programming spaces for all age groups, public library trends such as hands-on and collaborative learning, special collections, genealogical research and preserving local historical archives, and other aspects of the library's role as a community center.

a. Customer Mapping

We will map customer use of the building an a typical day and index these to various customer satisfaction comments collected by the Library. We will look for patterns of use by various groups and identifying when and where parallel or adjacent uses can be compatible or in conflict. We will look at utilization of various seating types and environments.



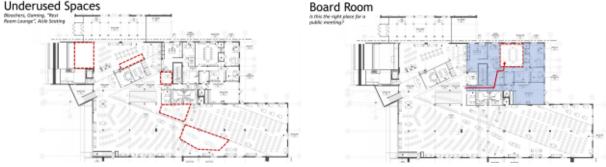
10 am Use Pattern

6 pm Use Pattern

Sample Mapping Diagrams Illustrating Use Patterns at Different Times of Day

b. Space Utilization Diagrams

We will diagram spaces that have limited utility or are not meeting potential based on location, access, technology, shape or other physical attribute.



Sample Space Use Diagrams (Barrington Area IL Library)

We will assess how well each facility performs in terms of essential library planning parameters:

- Site organization.
- Collection organization
- Observation
- Adaptability
- Security
- Self-help
- Materials processing
- Lighting

- Building zoning / adjacencies
- Technology integration
- Control
- Expandability
- Way finding
- Accessibility
- Acoustics
- Image
- 2. In the staff zone, shared service elements and workflow that support the library will be considered to maximize operational effectiveness and to repurpose duplicative space and create more or more efficient public or staff zones.

Part 3 - Strategic Facility Concept Definition and Evaluation

Depending on the results of the Programming and the Facility Effectiveness Assessment, a number of possibilities may arise. This portion of the process will enable the Library to understand how to get from what is in place to what is needed. This level of detail often suffices for most libraries and is much more rigorous than generic and rule of thumb and use of cost indexes. This part consists of multiple activities including visualizing improvements suggested by the Facility Effectiveness Assessment.

We do not prejudge and allow the Needs Assessment and Facility Effectiveness Assessment guide the definition of which options need to be included in this portion of the study. We approach each option with the same "get as much as you can for the money" and "what if this was the only option" mentality. Only once the options are defined do we work with you to compare options and define a recommendation.

Define Renovation Options

It may be appropriate to repurpose various spaces to take better advantage of their size, location, character or other attribute. Various "work with furniture as much as possible" and "stay within the existing building shell" concepts will be considered.



Sample concept diagrams

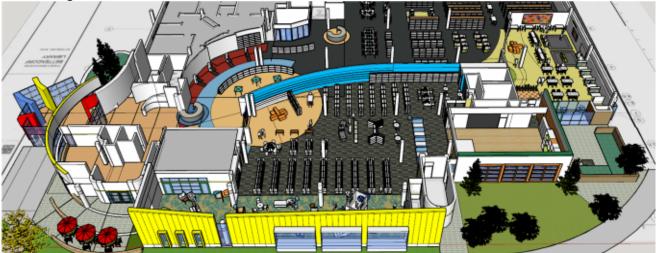
Define Remodeling Options

It may be better to adjust the physical attributes of a space to meet the performance goals associated with a particular service. This is envisioned as more complex set of changes and might include moving walls, changing ceiling heights, relocating portions of the mechanical or electrical infrastructure, or reconfiguring spaces entirely. The recommended near-term improvements would be arranged to balance the immediate needs with a future friendly remodeling concept. Any such assessment would be supported with various diagrams, an assets and liabilities matrix, and a cost model.

Define Expansion Options

The nature of the space use and need may be beyond what can be addressed by shifting uses or improving space attributes. We will assess the feasibility of expanding the existing building (or buildings depending on

the early findings). The recommended near-term improvements would be arranged to balance the immediate needs with a future friendly expansion concept. Any such assessment would be supported with various diagrams, an assets and liabilities matrix, and a cost model.



Sample Expansion Diagram (Bettendorf IA Public Library)



Sample Rendering (Lake Bluff IL Public Library)

Compare Options

The various concepts generated in early discussions will be tested against the Library's mission, priorities, and fiscal resources. An assets and liabilities matrix will be prepared to define an objective performance level for each concept.

Part 4 – Cost Modeling

A detailed, a la carte cost model will be prepared by an independent cost estimating consultant familiar with library renovations. We will frame this data for each concept. Operational cost implications of each concept will be reviewed with the Library's management team. Cost Models will be grouped to fit with designated budgets.

Cost Models / Planning Budgets

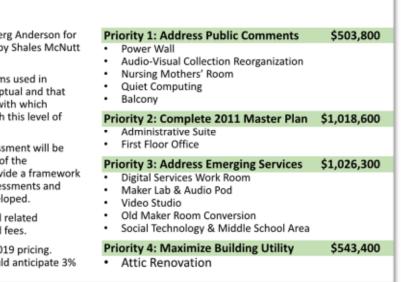
Cost models were developed by Engberg Anderson for the full set of priorities and reviewed by Shales McNutt Construction.

It is important to note that the diagrams used in developing the cost models are conceptual and that there are limitations to the precision with which probable costs can be determined with this level of information.

More planning and detailed cost assessment will be needed if the Library embarks on any of the components. The cost models do provide a framework upon which return on investment assessments and large scale financial planning can developed.

Costs are inclusive of construction and related expenses, furnishings, supervision and fees.

All costs are based on 4th quarter of 2019 pricing. Projects planned for future years should anticipate 3% escalation per year.

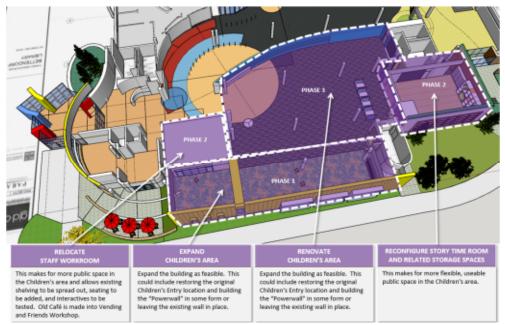


Sample Summary Budget

Part 5 – Implementation Strategies

Based on the cost models and the elections made by the Library, we will organize immediate, intermediate and longer-term components of the plan into a sequence of discrete but related projects that may include repairs/replacements, improvements to the existing buildings, expansions, or other strategies as deemed appropriate.

Likely groupings of improvements will be defined and indexed to likely funding strategies. A recommended path to achieving the Library's goals will be among multiple paths forward (all at once, phased improvements).



Sample Multi-Phase Implementation Strategy Diagram

Part 6 - Recommendation

With the testing completed, we will reconvene to identify a recommended course of action. With the agreement of the trustees and management team, we will prepare a final report.

SCHEDULE

We propose to provide the normal scope of services within 150 days of receipt of authorization to proceed. We will work with the Library to meet schedules for planning and funding.

BUDGET

The Library intends to implement the highest priority improvements using reserves and other funds. One goal of this study is to identify the scope of work that will fit with the resources available to the project.

OWNER SUPPLIED INFORMATION

The following are of use in preparing the drawings and cost models included in these cope of this agreement.

- Existing building drawings from the original construction or any subsequent renovations
- Environmental Assessments or Hazardous Materials Reports
- Other condition studies
- Contacts at various agencies having jurisdiction over the project

FEE PROPOSAL

This estimated fee is comprised of an initial allocation of fees:

| ٠ | Part 1 – Programming | \$2,000 |
|---|---|----------|
| ٠ | Part 2 – Facility Effectiveness Assessment | \$1,000 |
| ٠ | Part 3 – Strategic Facility Concept Diagrams and Evaluation | \$10,000 |
| ٠ | Part 4 – Cost Modeling (SMC Construction Services) | \$2,500 |
| ٠ | Part 5 – Implementation Strategies | \$2,000 |
| ٠ | Part 6 – Recommendation & Report | \$1,000 |

As noted, each Strategic Facilities Plan needs to be tailored to the Library. We are happy to discuss your specifics and can adjust the scope and focus of the effort to meet your needs.

Reimbursable Expenses

In addition to the Fees, expenses incurred in the course of completing the work will be invoiced to the Client. Detailed records of reimbursable expenses shall be included in monthly invoices.

Expense of professional liability insurance dedicated exclusively to this Project or the expense of additional insurance coverage or limits requested by the Owner in excess of that normally carried by the Architect. The Architect currently maintains the coverages identified in the *Insurance Coverages Exhibit*.

Incidental expenses will be invoiced in accordance with the attached *Reimbursable Expenses Exhibit*. Incidental Expenses shall be invoiced at our cost.

Progress Payments

Invoices shall be submitted monthly and shall reflect the status of the work at the time of the invoice.



Additional Services

No additional service will be undertaken without a defined scope and written authorization. Any Additional Service will be itemized and invoiced against a limit established and agreed to in writing by both parties. Any additional service shall be invoiced separately to allow tracking of project expenses.

ATTACHMENTS

The following Exhibits are made part of this agreement:

• Current Rate Schedule; Insurance Coverages; Expenses

ACCEPTANCE

We ask that an individual authorized to bind the Library to this agreement sign two copies of the agreement. This Acceptance covers the scope of work defined for Engberg Anderson and an hourly not to exceed fee of \$18,500. Keep one for your records and return the second to us. We will begin work upon receipt of a signed copy.

| For | For | |
|-------------------------|---------------------------|--|
| Engberg Anderson, Inc. | Lake Bluff Public Library | |
| | | |
| Signature: Xufulew ty. | Signature: | |
| Name: Joseph M. Huberty | Name: | |
| Title: Principal | Title: | |
| Date: March 13, 2024 | Date: | |

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Exhibits

CURRENT RATE SCHEDULE

Invoices for basic and additional services will be based on time charged to the project during the invoice period. The time will be invoiced based on the following schedule up to the limits specified for each service or phase of the project.

| Category | Hourly rate | Category | Hourly rate |
|--------------------------|-------------|---------------------------|-------------|
| Principal | \$165 | Senior Interior Designer | \$115 |
| Senior Team Leader | \$125 | Project Architect | \$105 |
| Team Leader | \$120 | Project Interior Designer | \$105 |
| Senior Project Architect | \$115 | Designer | \$95 |
| Senior Interior Designer | \$115 | Administrative Support | \$65 |

INSURANCE COVERAGE

Engberg Anderson currently maintains the coverages shown, the costs of which are included in the base fees proposed for the project. Additional coverage is negotiated on a project by project basis.

- Commercial General Liability: \$2,000,000 each Occurrence; \$4,000,000 Annual Aggregate.
- Business Automobile: \$1,000,000 Combined Single Limit, coverage includes hired and non-owned vehicles.
- Workers Compensation: Statutory requirements, \$1,000,000.
- Umbrella/Excess Liability: \$5,000,000 per Occurrence/Annual Aggregate
- Professional Liability: \$3,000,000 per Claim; \$3,000,000 Annual Aggregate
- Expense of professional liability insurance dedicated exclusively to this Project or the expense of additional insurance coverage or limits requested by the Owner in excess of that normally carried by the Architect will be a reimbursable expense.

REIMBURSABLE EXPENSES EXHIBIT

In addition to the Fees included in the Agreement, expenses incurred in the course of completing the work will be invoiced to the Owner in accordance with the following parameters.

- Transportation in connection with the Project including authorized out-of-town travel, lodging and sustenance.
 - Mileage is calculated using the prevailing IRS reimbursement rates.
 - Sustenance is limited to \$10/\$15/\$20 or \$45 per day.
- Reproductions, plots, standard form documents, postage, handling and delivery of instruments of service.
- Renderings, models and mock-ups other than those normally produced by the architect as a part of the process and requested by the Library will be provided as an additional expense.
- Expense of professional liability insurance dedicated exclusively to this Project or the expense of additional insurance coverage or limits requested by the Owner in excess of that normally carried by the Architect. The Architect currently maintains shown in the Insurance Coverages Exhibit:

Similar Strategic Facility Plan Projects

| Appleton (WI) Public Library | ☑ Facility Effectiveness Assessment, |
|---------------------------------------|---|
| · · · · · · · · · · · · · · · · · · · | ✓ Facility Condition Assessment, |
| | \square Accessibility Assessment, |
| | ☑ Strategic Space Needs, |
| | ✓ Concept Development & Testing: Renovation, |
| | |
| | Renovation/Expansion, Adaptive Reuse, and New Building |
| | concepts for 140,000 sf. |
| Auburn (AL) Public Library | ✓ Facility Effectiveness Assessment, |
| | Facility Condition Assessment, |
| | Accessibility Assessment, |
| | Strategic Space Needs, |
| | Concept Development & Testing: Renovation, |
| | Renovation/Expansion, Adaptive Reuse, and New Building |
| | concepts for multi-building system. |
| Barrington Area (IL) Library | 🗹 Customer Mapping, |
| | Facility Effectiveness Assessment, |
| | Facility Condition Assessment, |
| | ☑ Strategic Space Needs, |
| | Concept Development & Testing: Renovation concepts for |
| | 60,000 sf facility. |
| Beloit (WI) Public Library | ☑ Facility Effectiveness Assessment, |
| | ✓ Accessibility Assessment, |
| | ✓ Facility Condition Assessment, |
| | ☑ Strategic Space Needs, |
| | ✓ Concept Development & Testing: Renovation, |
| | Renovation/Expansion, Adaptive Reuse, and New Building |
| | concepts for 57,000 sf facility. |
| Bettendorf (IA) Public Library | ✓ Facility Effectiveness Assessment, |
| | \square Accessibility Assessment, |
| | \square Strategic Space Needs, |
| | |
| | Concept Development & Testing: Renovation, |
| | Renovation/Expansion concepts for 52,000 sf facility. |
| Bloomington (IL) Public Library | ☑ Facility Effectiveness Assessment Update, |
| | Facility Condition Assessment Update, |
| | Strategic Space Needs Update, |
| | Concept Development & Testing: Renovation, |
| | Renovation/Expansion concepts for 51,000 sf facility expanded |
| | to 70,000 sf. |
| Crystal Lake (IL) Public Library | Facility Effectiveness Assessment, |
| | ✓ Facility Condition Assessment, |
| | |
| | ✓ Accessibility Assessment, |
| | ✓ Accessibility Assessment, ✓ Strategic Space Needs, |
| | ☑ Strategic Space Needs, |
| | |

| Educandouille (II) Dublic Libuaru | |
|---|--|
| Edwardsville (IL) Public Library | ✓ Facility Effectiveness Assessment, |
| | ☐ Facility Condition Assessment, |
| | Accessibility Assessment, |
| | ✓ Strategic Space Needs, |
| | ✓ Concept Development & Testing: Renovation, |
| | Renovation/Expansion concepts for 20,000 sf facility expanded |
| | to 36,000 sf. |
| Evergreen Park (IL) Public Library | Facility Effectiveness Assessment, |
| | Concept Development & Testing: Renovation concepts for |
| | 23,000 sf facility. |
| Helen Plum Memorial (IL) Public Library | ✓ Facility Effectiveness Assessment, |
| | ✓ Facility Condition Assessment, |
| | Accessibility Assessment, |
| | ☑ Strategic Space Needs, |
| | Concept Development & Testing: Renovation, |
| | Renovation/Expansion, Adaptive Reuse, and New Building |
| | concepts for 37,000 sf facility expanded to 52,000 sf. |
| ndian Trails (IL) Public Library | ✓ Facility Effectiveness Assessment, |
| | \square Strategic Space Needs, |
| | ✓ Concept Development & Testing: Renovation, |
| | Renovation/Expansion concepts for 40,000 sf facility expanded |
| | to 60,000 sf. |
| oliet (IL) Public library | |
| onet (IL) Public library | ✓ Facility Effectiveness Assessment, |
| | Facility Condition Assessment, |
| | Accessibility Assessment, |
| | Concept Development & Testing: Renovation concepts for |
| | 74,000 sf facility. |
| isle (IL) Public Library | ✓ Facility Effectiveness Assessment, |
| | Facility Condition Assessment, |
| | ✓ Accessibility Assessment, |
| | ✓ Strategic Space Needs, |
| | ✓ Concept Development & Testing: Renovation, |
| | Renovation/Expansion, Adaptive Reuse, and New Building |
| | concepts for 29,000 sf facility expanded to 51,000 sf. |
| Marion (IA) Public Library | ✓ Facility Effectiveness Assessment, |
| | ✓ Facility Condition Assessment, |
| | ☑ Strategic Space Needs, |
| | Concept Development & Testing: Renovation, |
| | Renovation/Expansion, Branching, Mobile Library, and New |
| | Building concepts for 24,000 sf building replaced by 50,000 sf |
| | facility. |
| Palatine (IL) Public library | ✓ Facility Effectiveness Assessment, |
| | \square Facility Condition Assessment, |
| | \square Accessibility Assessment, |
| | |
| | Strategic Space Needs, |
| | Concept Development & Testing: Renovation concepts for |
| | 96,000 sf facility and two branches. |

| Poplar Creek (IL) Public Library | ✓ Facility Effectiveness Assessment, ✓ Facility Condition Assessment, ✓ Concept Development & Testing: Renovation concepts for 98,000 sf facility. |
|--|--|
| Rockford (IL) Public Library | Facility Effectiveness Assessment, Facility Condition Assessment, Accessibility Assessment, Strategic Space Needs, Concept Development & Testing: Renovation, Renovation/Expansion, Adaptive Reuse, and New Building concepts for Interim and new Main Library; Consolidation from 80,000 sf to 68,000 sf. |
| Waukesha (WI) Public Library | Facility Effectiveness Assessment, Facility Condition Assessment, Accessibility Assessment, Strategic Space Needs, Concept Development & Testing: Renovation, Renovation/Expansion concepts for 71,500 sf facility. |
| Winnetka Northfield (IL) Public Library District | Facility Effectiveness Assessment, Accessibility Assessment, Strategic Space Needs, Concept Development & Testing: Renovation, Renovation/Expansion, Branching, concepts for 22,000 sf building renovated and 4,000 sf facility expanded to 10,000 sf. |
| Academic Library Master Plans | |
| Hudson County (NJ) Community College Libraries • North Hudson Library • Gabert Library | Customer Mapping, Facility Effectiveness Assessment, Strategic Space Needs, Concept Development & Testing: Renovation concepts for 7,000 and 33,200 sf libraries. |
| University of Wisconsin – Green Bay Cofrin Library | Customer Mapping, Facility Effectiveness Assessment, Facility Condition Assessment, Strategic Space Needs, Concept Development & Testing: Renovation, Renovation/Expansion, and New Building concepts. Recommend replacement of 185,000 sf building with new facility of 180,000 sf. |
| University of Wisconsin – Madison Memorial Library College library Steenbock Library 24 building system assessment and system redevelopment plan | Customer Mapping, Facility Effectiveness Assessment, Facility Condition Assessment, Strategic Space Needs, Concept Development & Testing: Renovation, Renovation/Expansion, Adaptive Reuse, and New Building concepts. Recommend overall restructuring from 782,000 sf and 24 locations to 595,000 sf in 7 facilities. |