



San Francisco Public Library

Strategic Planning, As-Needed Consulting, & Facilitation Services

PROPOSAL • SEPTEMBER 2, 2022

Gensler



contigo.



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September 2, 2022

Marcus Lange
Contracts Manager, San Francisco Public Library
100 Larkin Street
San Francisco, CA 94102

Subject: San Francisco Public Library Strategic Planning Proposal

Dear Mr. Marcus Lange:

We are delighted to respond to the request for proposal from qualified teams to provide strategic planning and as-needed consulting, and facilitation services for the San Francisco Public Library (SFPL) system and the City and County of San Francisco. SFPL seeks to become an equity-minded and service-driven organization to meet the needs of tomorrow. Considering rapid and disruptive cultural, technological, and climate changes, SFPL needs a strategic plan that can be readily used not only for its core mission but also to become a “third place” for residents of all generations — a community center, technology access point, and climate resilience hub.

The spirit of this request presents a unique and comprehensive approach for SFPL to become accessible, resilient, and flexible. The proposal seeks to engage a broad set of stakeholders, analyze the regional context, and deliver a transformative strategy and an adaptable roadmap. In response, we have galvanized a collaborative partnership of local and national expertise to present our customized approach to specifically respond to the goals of SFPL.

Gensler, Margaret Sullivan Studio with Harmonic Design, CC&G, and Contigo Communications collectively bring a depth of strategic work, strategic thinking, inclusive community engagement processes, quantitative and qualitative analyses, master facilities planning, and sophisticated project management to ensure project success. Additionally, we bring a passion for public libraries to be co-created with the community and designed by the community's voices to constantly evolve to serve San Franciscans' ambitions. With deep compassion, intellectual curiosity, and an “imagine the possibilities” spirit, we will inspire all participants to “bring their best selves” to this work!

This will be demonstrated in a highly participatory, engaging, challenging, and process-driven work approach that will result in a bold vision, clarity of purpose, and a flexible strategic roadmap to guide an adaptable organization through the times of immense change, growth, and uncertainty that San Franciscans will experience.

Furthermore, as San Francisco enters a post-pandemic recovery, how SFPL can serve its diverse communities is even more urgent. This work will result in SFPL becoming a critical foundation to the City's social infrastructure, embodying SFPL's human- and community-centered equitable values, and providing social and physical resiliencies for a thriving, just, and prosperous community.

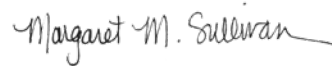
In short, our Project Team and SPFL will together strategically dream and articulate the vision (the preferred future) of what SFPL must become in order to meet the needs of tomorrow. We will also then create the strategic roadmap to realize the vision step by step. Simply put, we will teach you to fish. Our approach is to deliver a process, co-created and tailored, to build up SFPL's own capabilities to become self-reliant. By the end of the engagement, we will have confidence in the integrity of the roadmap because it is the result of deep community listening blended with data analysis and rigorous refinement. We'll have confidence in the ability to achieve the strategic plan because of newly developed capabilities co-created with staff.

We understand the urgency of this time and the opportunity for SFPL to lead the equity-minded and service-driven community economic development agenda for the City. We will bring our team's collective horsepower to meet this moment on behalf of current and future generations of San Francisco Public Library patrons. Our team looks forward to the next step.

Sincerely,



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Proposal

We are pleased to outline our responses to the proposal questions as provided in the Written Proposal Template. The language and order is the same. For the template format, please see the Appendix: Proposal Template Format.

1. Business Profile

Question: Provide a brief description of the Proposer's size and organization structure, and include a listing and description of any lawsuit resulting from (a) any project undertaken by the Proposer or by its subcontractors where litigation is still pending or has occurred within the last five years or (b) any type of project where claims or settlements were paid by the Proposer or its insurers within the last five years. If none, note that neither the Proposer nor any of its subcontractors have any such projects. Proposers should attest in their Business Profile whether or not the Project Team has availability to commence work as of the contract start date, anticipated in January 2023.

Our Project Team attests to being able to start January 2023. The following organizations will collaborate to form the Project Team, each bringing significant expertise and experience that collectively will achieve the best outcomes to fulfill the project objectives:

Gensler – project lead, project management, strategic design, analytics, equity-driven urban planning and placemaking

Margaret Sullivan Studio LLC (MSS) – library expertise

Corey, Canapary & Galanis (CC&G) (Micro LBE) – community research and staff engagement research, quantitative and qualitative expertise

Contigo Communications (Micro LBE) – community outreach and engagement and equity, diversity and inclusion

Harmonic Design, Inc. – change management service design, staff co-creation, and readiness for change

Gensler

Founded and headquartered in San Francisco in 1965, Gensler has successfully developed our practice and services to deliver projects around the world. With over 6,700 employees in 52 offices worldwide, we collaborate with corporate, government, institutional, and not-for-profit clients to achieve measurable business and organizational results through strategic planning and design. Our “one-firm firm” approach focuses on design's impact on human experience across the globe. Our core services include consulting and real estate services, sustainability, urban strategies, architecture, interior design, brand design, and digital experience design.

Our cross-disciplinary expertise helps connect the pieces. Our teams include a panoramic range of talent: strategists, economists, technologists, planners, experience designers, analysts, researchers, as well as architects and interior designers, and more — all working together to create thoughtful and compelling experiences. The Gensler team for

this effort will have project management, strategists, urban planners, and analysts as part of the team.

We are recognized for our project leadership and consistency. Gensler is the only firm in the nation to be named by its peers for 20 consecutive years as the firm most respected for the consistent quality of its strategic design work. Since the category was first initiated, we have been the only firm named the best-managed design firm in the nation. The company has successfully delivered strategic planning services to a list of client organizations, including the City and County of San Francisco, Santa Clara County, Prince George's County Langley Park Library, and Enoch Pratt Free Library.

Gensler has performed literally tens of thousands of jobs throughout the United States and abroad, and we are very proud of our record and ability to resolve disputes quickly and amicably. Over the past five years, Gensler has been involved in a few cases as a defendant. None of these cases has had a material impact on Gensler's financial standing, and current pending litigation is being covered by insurance and will not have a material impact on Gensler's financial standing. The particulars of these cases are confidential.

Margaret Sullivan Studio

Margaret Sullivan Studio is a mission-driven firm dedicated to advancing the impact of public libraries through community-driven, human-centered strategic planning, facilities design, community co-creation, staff engagement, and partner impact. Since the firm's founding in 2014, the Studio has become the industry leader in re-envisioning the 21st century library for diverse and complex contemporary communities.

The Studio is nationally recognized as a thought leader in the industry, connecting innovators, futurists, and relevant ideas to librarians and community leaders. Specifically, in the past eight years, MSS has revolutionized the industry by introducing equity-driven community economic development techniques to achieve strategic and master facilities goals. As a result, MSS has been a catalyst for over 40 library systems to confidently activate four million square feet of public library experiences through strategic planning and facilities design, fostering conditions for diverse communities to flourish nationwide.

The Studio is based in New York City with a team of fourteen multidisciplinary designers. MSS singularly employs women, people of color, and LGBTQ+ to align with clients goals to represent the voices and perspectives of those often under-represented in civic work. The Margaret Sullivan Studio team will include Margaret Sullivan, supported by her Director of Strategic Design, Chad Thomas, as well as design strategists, architects, and interior designers.

MSS does not have any projects where (a) litigation is still pending or has occurred within the last five years or (b) any type of project where claims or settlements were paid by the Proposer or its insurers within the last five years

Contigo Communications

Contigo was founded in January of 2018, and is a certified micro-LBE, micro SBE, WMBE and DBE certified firm located in San Francisco. Susana Razo and Milton Reynolds are community engagement and racial equity experts. Owner and Principal Susana Razo was born and raised in San Francisco and continues to reside in the City. She brings over 15 years of





consulting expertise, and works with a multidisciplinary team of 5 consultant professionals and 2 administrative supports.

The team prides itself for its ability to co-construct with clients engagement approaches that help to elevate the voices and needs of community members that have historically been left out of program and policy planning processes. These approaches help to pave the way for long-term systemic changes in community engagement for our clients.

Contigo does not have any projects where litigation is still pending or has occurred within the last five years or any type of project where claims or settlements were paid by the Proposer or its insurers within the last five years.

Harmonic Design, Inc.

Founded in 2018, Harmonic Design uses service design to inspire more human, cooperative, and sustainable services for society. We are headquartered in Atlanta, GA, and are the largest independent service design firm in the United States with a team of more than 20 service designers located from east to west coast.

Harmonic clients include for-profit, not-for-profit, and government organizations seeking to align strategy and service offerings with the needs of people. Our co-design process brings employees deep into understanding the needs and behaviors of all service actors, envisioning possible

futures, and identifying how service delivery, operations, and competencies should evolve to achieve strategic outcomes.

Libraries have partnered with our founder, Patrick Quattlebaum, and the Harmonic team to rethink strategies, reimagine service models, and expand their service design capacity to support their mission. Clients include: Salt Lake Public Library, Forth Worth Public Library, Richland Public Library (Columbia, SC), District of Columbia Public Library, Las Vegas Public Library, and several other urban library systems. Through consulting, training, and coaching, library leaders have transformed their customer experiences and equipped their staff to be more creative, collaborative, and outcome oriented.

Corey, Canapary & Galanis

Corey, Canapary & Galanis (CC&G) (Micro LBE) is a San Francisco based research firm incorporated in 1969. CC&G has a staff of 10. All research implementation is conducted by in-house staff. The firm is certified as a San Francisco Micro LBE, a California SBA, and a certified member of the California Green Business Network.

No lawsuits or litigation resulting from any project where litigation is still pending or has occurred within the last five years or any type of project where claims or settlements were paid by the Proposer or its insurers within the last five years.

2. Team Members Narrative

Question: Provide the role, responsibilities, qualifications, and company affiliation of every individual on the Proposer team who will perform the services outlined in this Solicitation. Discuss each team member's background and experience in order to demonstrate a strong ability to successfully perform the work.

Our team will bring a wealth of complementary and specialized experience and skills to developing the strategic plan, in addition to training, and outreach services, in collaboration with SFPL leadership, staff, and stakeholders, that will drive the transformation required to achieve SFPL's strategic goals.

The Project Team is composed of:

Gensler — Midori Mizuhara and Michelle Lee will be primary Points of Contact supporting project management and team coordination/ engagement. Lisa Cholmondeley, is a principal in the San Francisco office and will serve as principal oversight. Elaine Asal will be a strategic advisor to the project supporting with her strong experience in equity-driven development, civic engagement and urban planning efforts. The Gensler team also includes an analyst, urban planner, and support strategists.

MSS and Harmonic Design — Margaret Sullivan and Patrick Quattlebaum as project library experts, supported primarily by Chad Thomas, Director of Strategic Design, Shuyu Fang, Social Impact Designer, and Annika Northland, Urban Placemaker

CC&G — Jon Canapary and Carol Anne Carroll as quantitative and qualitative research experts

Contigo Communications — Susana Razo and Milton Reynolds as community engagement outreach expert

As Project Co-Leads, Elaine (Strategic Advisor), Michelle (Lead Strategist), and Midori (Project Manager) will guide the team to strategically approach the overall project including audits and assessments, outreach engagement, and qualitative and quantitative data analyses to generate strategies for the SFPL to enhance neighborhood social infrastructure through its library system with an eye towards equity, inclusivity, and climate resilience. They, along with the Project Team, will

develop the strategic plan documents to meet the City's requirements. Midori and Michelle will be the primary points of contact for the team. Gensler excels at complex and challenging projects, specifically efforts that combine a wide range of stakeholders, quantitative and qualitative analysis, as well as high targets for positive impact. Our project co-leads are well versed in these types of engagements and lead the firm in equitable engagement and planning efforts. Midori has a long history in California, working with community organizations and public engagement around equity driven planning efforts. Her background in architecture, urban planning, program development and community engagement equips her to think systematically about our built environment. She is highly organized, and a strong team leader with excellent communication skills. Michelle is based in San Francisco and has deep experience in the design and facilitation of inclusive workshops and strategy expertise leading a wide range of project types and engagements. Elaine, has a long history supporting complex equitable development projects and leading long range strategic efforts for non-profits, corporations, developers, and public sector clients. Her most recent collaboration with Margaret Sullivan Studios has demonstrated a highly effective partnership to deliver a thoughtful, and comprehensive strategic plan for the Enoch Pratt Free Library System in Baltimore. In addition, the Gensler team has a deep bench of strategists, analysts, and planners to support the project as may be needed over the course of the engagement.

Margaret, Project Library Expert, will lead SFPL staff and leadership participation, the mission and values audit and development, demographic and trends analysis, and bring industry best practices to the process. She has collaborated with over forty public library systems, helping them to re-envision the 21st century library for diverse and complex contemporary communities, with a focus on America's urban cities. Her work can be seen in public library systems from New York to Chicago, from the District of Columbia to Los Angeles.

Patrick, Project Library Expert, will work with SFPL leadership, staff, and the consultant team to foster a co-creative process that will create momentum for understanding, creativity, and change. His approaches will help the greater team

synthesize the community's stories, needs, challenges, and ambitions to envision new or reimagined services, journeys, and experiences. He brings a human-centered service design mindset and shares methods for sustained organizational transformation to each project, including his work with public library systems in the District of Columbia, Salt Lake City, and Las Vegas-Clark County.

Jon Canapary, Project Research Lead, will design and execute a robust research effort that will be implemented as part of this project. Carol Anne Carroll, Research Director, will lead sampling, scheduling and quality checks for the project's research components. The research approach will include statistically reliable data collected from both internal and external stakeholders. Jon and Carol are uniquely qualified to lead this effort for the SFPL having served as Project Leads for both the City Survey on which the SFPL scored an A- rating and on the SFPL Open Hours study which was last completed in 2018. As key leaders of a local micro-LBE firm, Jon and Carol have also lead numerous research efforts in which data was used in strategic planning. This includes work for the SF Municipal Transportation Agency, SF International Airport, the SF Public Utilities Commission, SF Paratransit and others. The research design for the 2022 SFPL strategic plan project will be led by seasoned leaders who have expansive local knowledge. This will ensure the research conducted will be inclusive and representative of the City as a whole.

Susana Contigo Razo, Community Outreach Lead, will raise awareness about the SFPL equity goals and project purpose; provide consistent/easy-to-understand communications regarding the SFPL's strategic planning process; collaborate with the staff, partner organizations and community to develop a shared vision and action plans for establishing and/or improving the SFPL's equity metrics; engage with, and solicit input from, policymakers, the general public, and stakeholder groups as part of the strategic process, and in particular develop methods to obtain meaningful input from an array of stakeholders and possibly hard-to-reach-population segments. Susana specializes in strategic communications, outreach and meaningful engagement of diverse hard-to-reach communities and stakeholders. Contigo, means "with you" in Spanish, and it is the firm's belief that engagement begins and ends with deep listening. Contigo

has extensive experience planning and facilitating productive engagement of diverse stakeholders on challenging projects. Projects have ranged broadly and include, school relocations, school resource planning, equity program planning and implementation, real estate mixed-use development projects, infrastructure and public space planning and strategic planning. This range of experience, accompanied by a proven track record, makes Contigo a nimble and capable partner in effective internal and external community engagement.

Strategic Planning Task Chart

Collectively we have done over 22 projects of similar ambition. For quick reference, please see the chart on page 12.

We are an unparalleled team of leading national thought leaders and practitioners who are re-envisioning the library for the 21st century, pioneering equity and inclusion strategies for organizations, and engaging and activating communities in San Francisco and across the nation. We have extensive experience working on projects of similar complexity to San Francisco Public Library's project that address strategic visioning, stakeholder trust building and outreach, quantitative and qualitative data capture and analysis, and sustainability for impactful results within a context of rapidly changing circumstances and unknowable futures.

Motivated by our aligned values, we will drive a visionary yet actionable strategic planning process in partnership with SFPL that can be readily used to inform service-driven, equity-minded programming and capital investments.

Building Strategy Through an Implementation Perspective

When we design a plan, it is much more than a material product that is delivered — it provides a direction and capability for an organization to grow. For SFPL, the strategic planning process will become a preliminary journey and experiential learning tool enabling the Library to confidently rethink strategies, reimagine service models, and grow service design capacity in support of sustained transformation. Additionally, since we are planners and designers, as well as implementers, we bring a rare perspective to the strategic planning process that is informed by current, real world

knowledge and that allows us to always hold implementation in mind as the final outcome.

Leveraging Strengths through Experienced Project Management to Foster a Culture of Collaboration

Strategic and innovative work is a team sport. We value co-creating and partnership. Our methodology is participatory and interactive. Strong project management is about communication, leveraging the talents of the team, and supporting every team member to ensure the process runs at the agreed upon pace. In strategic work, this requires sophisticated project management expertise. SFPL will benefit from the experience and breadth of Gensler, the expert experience MSS and Harmonic Design has had at creating new methodologies that require real time re-direction, the deep community trust of Contigo Communications, and the market analytics expertise of CC&G. Clear communication protocols will be established early on in the project in collaboration with SPFL, supported by consistent check-ins and tracking of tasks and engagements.

Designing Strategies and Service Design Experiences for Urban Libraries

Our team is passionately driven by our desire to create change for social justice, inclusivity, and the environment. MSS is dedicated almost exclusively to advancing the role of the American Public Library as a vehicle for inclusivity and community transformation—the only firm distinguished as such in the country. MSS has become the industry leader in re-envisioning the 21st century library for diverse and complex contemporary communities, with a focus on



RELEVANT PROJECT EXPERIENCE

INSTITUTION'S NAME	DATES	SIZES	FIRM	STRATEGIC PROFESSIONAL SERVICES
PRINCE GEORGE'S COUNTY MEMORIAL LIBRARY SYSTEM	2019 - Present	\$33 Million / 19 Facilities / 217 Employees	MSS with Harmonic Design and Gensler	Strategic Planning, Facilities Planning
ENOCH PRATT FREE LIBRARY	2022 - Present	22 Facilities	MSS with Gensler	Strategic Planning, Master Facilities Planning
OMAHA PUBLIC LIBRARY		N/A	MSS with Harmonic Design	Strategic Planning, Master Facilities Planning
SALT LAKE CITY PUBLIC LIBRARY	2014 - Present	\$16 Million / 8 Facilities / 335,000 SF/ 300 Employees	MSS with Harmonic Design	Strategic Planning, Master Facilities Planning, Community Engagement, Architecture and Interiors, Staff Day
LAS VEGAS-CLARK COUNTY LIBRARY DISTRICT	2015 - Present	\$59 Million / 26 Facilities / 1,000,000 SF/ 700 Employees	MSS with Harmonic Design	Strategic Planning, Master Facilities Planning, Community Engagement, Architecture and Interiors, Staff Day
FORT WORTH PUBLIC LIBRARY	2017 - 2018	\$17 Million / 16 Facilities / 143,000 SF/ 207 Employees	MSS with Harmonic Design	Strategic Planning, Staff Day
NEW YORK PUBLIC LIBRARY	2016 - 2017	\$300 Million / 92 Facilities / 646,000 SF/ 3150 Employees	MSS with Harmonic Design	Strategy, Master Facilities Planning, Architecture and Interiors, Leadership & Staff Engagement
DC PUBLIC LIBRARY	2019	\$65 Million / 25 Facilities / 900,000 SF/ 600 Employees	MSS with Harmonic Design	Strategy, Visioning, Facilities Planning
RICHLAND (SC) LIBRARY AS STUDIO	2015-2020	\$26 Million / 13 Facilities / 300,000 SF/ 300 Employees	MSS with Harmonic Design	Strategy, Master Facilities Planning, Architecture and Interiors, Leadership & Staff Engagement
THE BRONX COMMUNITY FOUNDATION'S NETWORK	2012 - Present	N/A	MSS with Harmonic Design	Strategy, Organizational Development, Coalition Building, Community Engagement, Pro-Bono Design
ALTADENA (CA) LIBRARY DISTRICT	2019	\$4 Million / 2 Facilities / 24 Employees	MSS	Strategic Planning, Community Engagement, Board & Staff Engagement
ANNE ARUNDEL COUNTY (MD) PUBLIC LIBRARY	2015 - 2019	\$29 Million / 27 Facilities / 300 Employees	MSS	Strategic Planning, Community Engagement, Architecture and Interiors
BOULDER PUBLIC LIBRARY	2016	\$10 Million / 3 Facilities / 41 Employees	MSS	Strategic Planning, Community Engagement, Master Facilities Planning
CONTRA COSTA COUNTY (CA) LIBRARY	2018 - Present	\$57 Million / 26 Facilities / 194 Employees	MSS	Customer Experience Guide, Community Engagement, Architecture and Interiors
FRESNO COUNTY PUBLIC LIBRARY	2017	\$24 Million / 34 Facilities / 700 Employees	MSS	Strategy, Master Facilities Planning, Leadership & Staff Engagement
GRAND RAPIDS PUBLIC LIBRARY	2018	\$9 Million / 8 Facilities / 102 Employees	MSS	Strategic Planning, Community Engagement, Architecture and Interiors
PORT OF SAN FRANCISCO RACIAL EQUITY TRAINING AND COMMUNITY ENGAGEMENT	2020 - 2021	N/A	Contigo	Port Racial Equity Consulting and Training
PG&E POTRERO AND HUNTERS POINT POWER PLANT CLEANUP PROJECTS	2009 - 2017	N/A	Contigo	Strategic Planning for Community Engagement, Plan Development & Execution
OAKLAND UNIFIED SCHOOL DISTRICT (OUSD) FACILITIES	2019 - 2020	N/A	Contigo	Community Engagement
CITY AND COUNTY OF SAN FRANCISCO 2020 CENSUS	2019 - 2020	N/A	Contigo	Community Engagement
SAN FRANCISCO PUBLIC LIBRARY OPEN HOURS ASSESSMENT	2017 & 2012	N/A	CCG	Strategic Planning, Community Engagement, Community Research
OFFICE OF THE CONTROLLER: SAN FRANCISCO CITY SURVEY	2019, 2017, 2015	N/A	CCG	Strategic Planning, Quantitative Research by Supervisorial District

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America's urban cities. The Studio has collaborated with over forty public library systems, along with the following urban library systems, to provide strategic planning, facilities master planning, visioning, programming, curriculum development, architectural design, and staff professional development: New York Public Library, DC Public Library, Chicago Public Library, Cleveland Public Library, Charlotte-Mecklenburg Public Library, Fort Worth Public Library, Las Vegas-Clark County Public Library, Los Angeles Public Library, Prince George's County Memorial Library System, Richland (SC) Library, Salt Lake City Public Library, and Salt Lake County Public Library.

Our team is joined by Patrick Quattlebaum, Harmonic Design, a firm specializing in human-centered service design and a long-time collaborator with MSS, such as with Richland Library's Executive Director, Melanie Huggins to develop the innovative "Library as Studio" model, which provides a variety of creative spaces to strengthen community connections and catalyze a creative economy. Patrick and his team have also trained staff at many libraries and at the state level in service design, building capacity to reimagine service models, services, and customer and staff experiences.

The 21st Century Library in 2022

The 21st century public library repositions itself from a well-intentioned passive entity into an active, intentional, and synergistic force providing meaningful community impact. Today, libraries are expected to offer a spectrum of services and functions for a variety of users influenced by myriad conditions — all for the diverse communities they serve. Major urban libraries such as SFPL have enormous responsibilities to fulfill, yet today especially, there is also an incredible opportunity for libraries to positively influence communities and foster economic development.

Yet to be truly transformational institutions, the public library must adopt new approaches that radically depart from the standards, benchmarks, metrics, and trends of the past. SFPL is already embracing the 21st century library paradigm across its 27 branches. The BLIP campaign has successfully revitalized the majority of its branches, all while receiving consistently excellent ratings from its users.

The Urban Impact Model

MSS stands out as an industry leader that activates the 21st century library to achieve significant social outcomes by generating connections, building coalitions and revitalizing economies.

The Studio's revolutionary mission-driven industry projects include:

- ImaginOn, the Joe and Joan Martin Center, "the first library of the 21st century"

- DreamYard Arts Center in the South Bronx, YOUMedia/Connected Learning prototype, with Chicago Public Library
- Library as Studio, an innovative methodology for human-centered 21st century facilities design, with Richland Library and Harmonic Design
- Here-to-Here—aka Grit Lab—a collective impact youth career pathways non-profit forging financial sustainability and economic impact for The South Bronx
- Salt Lake City Public Library's groundbreaking Strategic Roadmap, with Harmonic Design

These mission-driven models produce meaningful outcomes by using programming and place to foster community connections and coalition building. They weave together a social infrastructure of partnerships that enables them to forge collective action and collaborative advocacy that soon become deeply embedded in their communities, enriching them and in some cases sustaining them. Our outcome-focused process has proven to leverage community leaders, organizations and assets for a collaborative impact model that, if successful, takes on a life of its own.

In 2020, at the height of the pandemic, funding was cut for Youth Empowerment Summer (YES), New York City's Summer Youth Employment Program and the largest youth employment program in the US. This triggered a rapid response ecosystem of advocates, educators, community leaders, and youth activists who mobilized to leverage a wide array of collective action interventions. Here-to-Here, designed by MSS, was one of those players.

YES's work to restore funds for the City's youth employment program employed collaborative advocacy - from SYEP providers, informal community learning organizations, and teen activists. As an effective model that engendered meaningful connections, Here-to-Here, revealed how such networks can make movements happen.

Urban Planning from an Equity Lens

We understand the importance of both quantitative data, and qualitative engagement in creating an informed, and tangible outcome rooted in equity and inclusion. We apply an equity lens to our studies and planning approach - giving SFPL the tools and context it needs for clear and intentional decision making. The Library Urgency Index mapping methodology helps to illustrate need, relative to other planning parameters such as branch walksheds, areas of investment, political districts, schools or recreational centers. Layering this information together provides useful context in one clear visual. Connecting the physical mapping to a quantitative understanding of economic development factors, community health needs, arts and culture further allows us to explore gaps, challenges and opportunities for the libraries to provide meaningful support and engagement.

Engaging Community through the Lens of Justice, Equity, Diversity, and Inclusion

We also know that equity goes beyond physical planning. An inclusive process will be necessary to an inclusive outcome. The how of our inclusive process is a vital part of building capacity, support, and fundamentally building a community-centered solution that engages and builds its audience along the way. A good strategic plan doesn't stop at the physical assets, it understands the programming, activation, and community curation necessary for it to thrive. We will collaborate with SFPL staff, partner organizations and the community to advance its equity metrics,

Connecting, Engaging and Communicating with SFPL's Stakeholders

Our approach to the strategic process ensures that SFPL's plan will be guided by the voices of all of San Francisco's diverse communities and residents. The Contigo Team knows and appreciates the varied richness of San Francisco and its micro-communities. Also, key team members, from Gensler and Harmonic Design have considerable outreach experience and alignment with the City's people and neighborhoods.

Qualitative and Quantitative Data Gathering and Analysis

Gensler, MSS, and CC&G will all contribute their considerable resources and capabilities for the qualitative and quantitative data analysis required for SFPL's Plan. Gensler will also provide additional capacity to the team's data collection and analysis resources via its in-house data analytics team. MSS will deliver benchmarking studies, in addition to case studies of public libraries that have embraced similar bold visions.

Strategic Plan Document Materials Development and Presentation Support

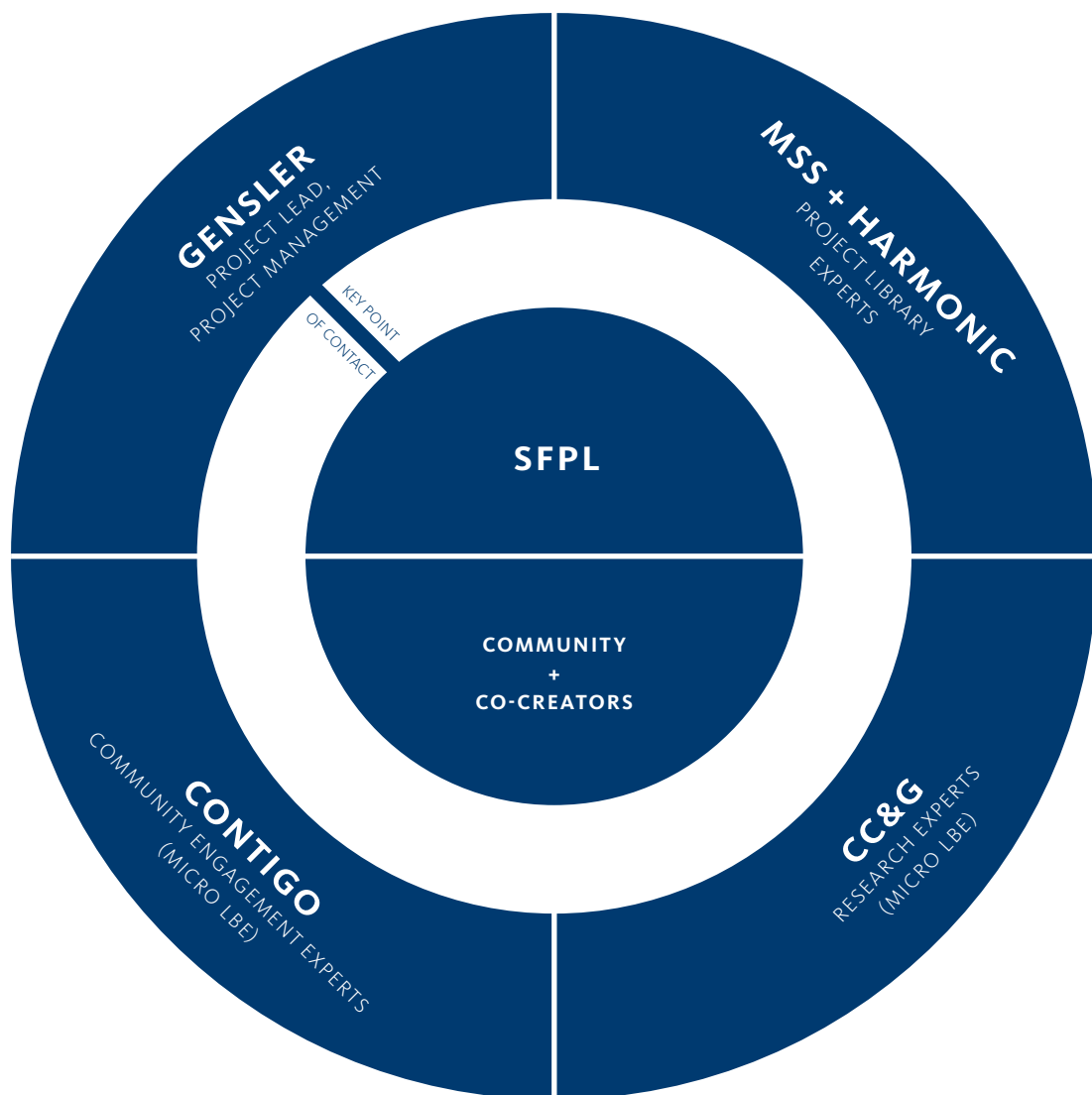
For SFPL, Gensler and MSS will produce thoughtful and creatively designed strategic plan documents, including toolkits, workshop books, and strategic road maps, in support of innumerable public library planning projects. All Team Partners are exceedingly qualified to provide presentations.

As-Needed Consulting

All team members take on extended as-needed consulting work that often follows intense engagements and are available to continue to offer such services to SFPL.

3. Team Organizational Chart

Question: Insert JPEG (or other common electronic picture) into proposer response.



4. Key Team Members

Question: Identify and provide resumes for all staff who will serve as the Key Team Members so that the Evaluation Panel can evaluate the ability of each team member to successfully fulfill their project roles and complete the scope of services. If attaching resumes via a separate attachment please indicate below below of proposed Organizational Chart that illustrates the team structure (include the integration/interaction with City project team staff). Note the Proposer name and title/role for each team member.



Lisa Cholmondeley

PRINCIPAL-IN-CHARGE, GENSLER

Lisa is a highly accomplished design leader whose work reflects her passion for architectural theory and design while making a positive impact on communities. She leads with purpose, guiding teams to reach the ideal solutions aligning clients' vision and goals to physical space. Lisa has developed a skillset and an in-depth knowledge of a project's lifespan – from inception and far past completion. Her recent focus on diversity, equity, and inclusion across the architecture industry has generated a movement devoted to the strength of a team and people with diverse backgrounds to create positive results.

26 years experience

CDT, LEED AP BD+C, LEED AP, RA

Master of Architecture, Histories & Theories, Architectural

Association of School of Architecture, London, UK

Bachelor of Architecture, Cornell University, Ithaca, New York, NY

Selected Project Experience

Confidential Technology Client, Oakland, CA

Fivetrans, Oakland, CA

City of San Jose On-call Urban Design Review, San Jose, CA

County of Santa Clara, Reid-Hilview Site Planning, San Jose, CA

Schools of the Sacred Heart, Theater Makerspace,

San Francisco, CA

USF McLaren Conference Center, San Francisco, CA

Barclays Capital, London, UK

KAFD, Cloud 9-Children's Interactive Museum, Riyadh, SA

Msheireb Downtown Doha, Phase 2, Doha, Qatar

Msheireb Downtown Doha, Phase 3, Doha, Qatar

Urban Planning Council HQ, Abu Dhabi, UAE



Midori Mizuhara

PROJECT MANAGER, GENSLER

Midori is a multi-disciplinary designer whose work spans planning, urban design, and architecture. Her work focuses on creating well designed and activated public spaces and creatively engaging communities to shape their city. From plazas, parks, sidewalks, streets, and leftover urban spaces, Midori works at multiple scales with a variety of stakeholders, and has honed her skills in leading community driven processes to create impactful public spaces. Midori has shaped public realm design projects locally and nationally. She has also led region-wide community outreach and creative marketing campaigns.

15 years experience

Master in City Planning (MCP), Massachusetts Institute of Technology, Cambridge, MA

Bachelor of Architecture (BArch), Southern California Institute of Architecture, Los Angeles, CA

Selected Project Experience

SCAG Go Human Tactical Urbanism & Active Transportation Series, Los Angeles, Fontana, Palm Desert, El Centro, Westminster, CA*

City of Citrus Height Sunrise Mall Specific Plan, Citrus Heights, CA

Los Angeles Metropolitan Transportation Authority (LACMTA)

Go Little Tokyo: Neighborhood Marketing and Community Outreach

Metro Integrated Station Design Solutions, Los Angeles, CA

Rethink Randolph: Randolph Street Rails-to-Trails Feasibility Study, Huntington Park, CA*

The Plaza at Santa Monica Vision and Public Realm Strategy, Santa Monica, CA*

City of Hope Master Plan, Duarte, CA 110 acres

Moorpark College Facilities Master Plan, Moorpark, CA 150 acres

Pasadena City College Master Plan, Pasadena, CA

*Experience prior to joining Gensler



Michelle Lee

LEAD STRATEGIST, GENSLER

Michelle creates holistic, regenerative outcomes for organizations using strategy and design. Michelle listens first to ask better questions and bring clarity from uncertainty. She creates space for clients and team members to see themselves in a new light and in turn what's possible. She is versed in leading projects from conception, clearly defining the opportunity, facilitating interactions, and guiding interdisciplinary teams to explore, prototype, and provoke unexpected outcomes. She has experience working with startups and global companies across industries.

13 years experience

Bachelor of Science in Business, University of California, Berkeley
International Business, American International University, Florence,
International Studies Program

Selected Project Experience

Google, Confidential Real Estate Strategy
Confidential Technology Client Inclusive Design Portfolio Audit and
Strategy, Global
Adobe Change Strategy, San Jose, CA
Adobe KPI Framework Pilot: Food, Wellbeing, Events and Community
Microsoft Wellness Care and Culture Research, Redmond, WA
Adobe Community Concepts, San Jose, CA
Adobe Neighborhood Pilots
Confidential, Strategic Vision & Planning Retreat, San Francisco, CA
Confidential, Futures Strategy for San Francisco Employees,
San Francisco, CA*
Kilroy 2nd Street Plaza Redevelopment, San Francisco, CA*
* Experience prior to Gensler



Elaine Asal

STRATEGIC ADVISOR, GENSLER

A connector, catalyst, instigator, and communicator, Elaine believes that positive impact comes from thoughtful, informed and tangible solutions, achieved when passionate people come together around a shared narrative and common goals. As a Consulting Practice Area Leader in Gensler's Southeast region, Elaine is a strong visual communicator that excels at visioning and facilitation, innovation strategy, community and stakeholder engagement, and equitable development strategy. She has worked across a wide-ranging portfolio of projects, expertly weaving best practices and research from across the firm, with her deep understanding of organizational culture.

20 years experience

Associate Member, American Institute of Architects
Bachelor of Architecture, Cum Laude, University of Oklahoma
International Studies Program, Fachhochschule/University of
Oklahoma Ausburg, German Study Abroad Program

Selected Project Experience

Enoch Pratt Free Library Facilities Masterplan, Baltimore, MD
Prince George's County Langley Library, Langley, MD
Confidential Mixed Use Development, Pittsburgh, Pennsylvania
Penn Station Redevelopment, Baltimore, MD
Eager Park, Baltimore, MD
ACLU, Hybrid Workplace Real Estate Study, New York, NY N/A
MICA, Creative Learning Center, Baltimore, MD
APTA Headquarters, Workplace & User Analysis, Alexandria, VA
Pittsburgh Int'l Airport, Innovation Workshop, Pittsburgh, PA
Cystic Fibrosis Foundation, Bethesda, MD



Margaret Sullivan

PROJECT LIBRARY DESIGN EXPERT, MSS

Margaret is a nationally recognized thought-leader in visioning, strategy, community engagement, and designing public library experiences. Collaborating with city leaders, she positions the public libraries to lead the social justice agenda. She skillfully collaborates with stakeholders to strengthen community trust, build coalitions, amplify community alignments, and re-imagine the 21st century public library to honor communities' aspirations. Margaret's depth of understanding of the contemporary public library's past, current, and future service models enables her to skillfully translate community goals into customized strategies.

25 years experience

Library Planning and Design Program, Harvard Graduate School of Design, Cambridge, MA
Bachelor of Architecture, Clemson University, Clemson, SC
Bachelor of Art, Art History, Wake Forest Univ. Winston-Salem, NC

Selected Project Experience

Altadena Library District Strategic Planning, Altadena, CA
Anne Arundel County Public Library Strategic Plan, Annapolis, MD
Bronx Community Foundation Strategic Planning, Bronx, NY
Fort Worth Public Library Strategic Services Plan, Fort Worth, TX
DC Public Library, Martin Luther King Jr. Memorial Library, Visioning & Programming, Washington, DC
Empire State Library Network, Strategic Plan | New York, NY
Enoch Pratt Free Library Strategy, Facilities Master Plan, Baltimore, MD
Fresno County Public Library Strategic Planning, Fresno, CA
Las Vegas-Clark County Library District, Las Vegas, NV
New York Public Library, Strategic Facilities Planning, New York, NY
Prince George's County Memorial Library System, Largo, MD
Salt Lake City Public Library, Salt Lake City, UT



Jon H. Canapary

RESEARCH EXPERT, CC&G

With 20+ years' experience, Jon brings an innate ability to create relevant and cost-effective studies for a multitude of clients, while also providing strong, positive leadership to the talented team of professionals at the company. Externally, he has provided clients with many first-of-its-kind questionnaires and study strategies. He has also been at the forefront of incorporating relevant technology into every study – while maintaining study integrity. Jon is responsible for client interface, team performance, study design, questionnaire development, and day-to-day oversight, and will be involved in all project tasks.

20 years experience

Bachelor of Art, English & History, Tulane University, New Orleans, LA
Served as Vice President of Marketing Research for the American Marketing Association's San Francisco Chapter
Served as a member of the Mayor's Tenderloin Task Force

Selected Project Experience

California Energy Commission – Vehicle Study (2015-2016)
Caltrain Recovery Survey (October 2020)
Caltrain Rider Surveys (Since 2007)
Capitol Corridor Surveys (Since 1999)
City Survey 2015, 2017, 2019
East Bay Paratransit Surveys (Since 1998)
Golden Gate Transit Recreational Survey (2015-2016)
Golden Gate Transit Focus Groups (2016)
MTC Onboard Transit Studies (Since 2017) including work on SMART, Sonoma County Transit, WETA (ferries), Union City Transit, Napa Transit, and Marin Transit
SamTrans Triennial Survey (Since 2006)
San Francisco Public Library Open Hours Study (2012, 2017)



Susana Razo

CO-FACILITATOR & COMMUNITY ENGAGEMENT EXPERT, CONTIGO

Susana has extensive experience with outreach and engagement with diverse audiences and communities for sensitive, public-facing projects. Attuned to social/racial equity and environmental justice issues in San Francisco and the workplace, Ms. Razo excels at effectively engaging diverse stakeholders, developing effective messaging, and building buy-in amongst diverse groups while identifying engagement challenges early to prevent and mitigate potential issues. Ms. Razo is a native San Franciscan, a first generation Mexican American, and the first in her family to go to college. She is fluent in Spanish.

15 years experience

Master in Public Administration, New York University
Bachelor of Arts, University of California at Berkeley

Selected Project Experience

- City and County of San Francisco, Port of San Francisco Racial Equity Consultant, San Francisco, CA
- PG&E Substation Modernization and Plaza Communications and Community Engagement Consultant, San Francisco, CA
- 7-11 Property Surplus Committee, Napa Valley Unified School District (NVUSD) Communications and Community Engagement Consultant, Napa, CA
- 2020 Census, Office of Civic Engagement and Immigrant Affairs Outreach Consultant, City and County of San Francisco, CA
- City of Richmond American Rescue Plan Act Needs Assessment Richmond, CA
- Oakland Unified School District (OUSD), McClymonds High School Modernization Project, Oakland, CA



Patrick Quattlebaum

SERVICE DESIGN & STAFF CO-CREATION EXPERT, HARMONIC DESIGN

Patrick Quattlebaum is a service design expert who uses innovative approaches for bringing staff into the process of understanding community needs, framing future possibilities, and adapting to change. As Harmonic Design's CEO, Patrick leads a team of service designers and consults to organizational leaders desiring to transform their service ecosystem to better meet the needs of people. He has taught thousands of practitioners (including hundreds of librarians) the craft of service design, design strategy, and design research. He is co-author of Orchestrating Experiences, which is used in design schools around the world.

25 years experience

Master of Science, Information, Design & Technology, Georgia Institute of Technology, Atlanta, GA
Bachelor of Art, English from the Honors College, University of South Carolina, Columbia, SC

Selected Project Experience

- Omaha Public Library, Service Model Alignment, Omaha, NB
- Maryland State Library, Service Design Learning Experiences, Maryland
- Charlotte Mecklenburg Library, Service Model Innovation, Charlotte, NC
- DC Public Library, Digital Fluency Strategy, Washington, DC
- Las Vegas-Clark County Library District, Service Model Innovation, Las Vegas, NV
- Fort Worth Public Library, Strategic Planning, Fort Worth, TX
- Do Good Columbia (Richland Library), Design & Facilitation, Columbia, SC
- Salt Lake City Library, Strategic Planning, Salt Lake City, UT
- Memphis Public Library, Service Design Capability Building Memphis, TN
- Richland Library, Library as Studio Strategy, Columbia, SC



Chad Thomas

DESIGN STRATEGIST, MSS

Chad has over 20 years of experience working within the built environment in fields spanning real estate development, sales, and affordable housing. As the Director of Strategic Design, he combines his professional experience with his foundation in social justice and culture to create innovative solutions around social justice and equity. His practice is grounded in design thinking methodology which he uses to add user-centric value and facilitate change through divergent thinking, creative facilitation, and design research.

21 years experience

Master of Arts, Design Management, Savannah College of Art & Design
Bachelor of Arts, American Studies, Wesleyan University, Middletown, CT

Selected Project Experience

Omaha Public Library, Service Model Alignment, Omaha, NB
Maryland State Library, Service Design Learning Experiences, Maryland
Charlotte Mecklenburg Library, Service Model Innovation, Charlotte, NC
DC Public Library, Digital Fluency Strategy, Washington, DC
Las Vegas-Clark County Library District, Service Model Innovation, Charlotte, NC
Sarasota County Library & Historical Resources, Strategic Planning and Visioning, Sarasota, FL
City of Buckeye Public Library, Facilities Master Planning, Buckeye, AZ
Hartford Public Library at SWIFT, Community Engagement, Hartford, CT
Richmond Public Library, Staff Development, Richmond, CA
Bartholomew County Public Library, Master Facilities Planning & Visioning, Columbus, IN



Milton Reynolds

PRINCIPAL FACILITATOR, RACE EQUITY TRAINER, CONTIGO TEAM

Milton develops innovative, research-based, approaches to equity and inclusion. By blending deep historical knowledge, theory and pedagogy he creates participant-centered learning experiences that consistently shift participants' understanding and practice.

Milton is a locally and nationally recognized facilitator, content design specialist, and critical race theory practitioner.

30 years experience

Bachelor of Arts, Sociology, San Jose State University
Minor in Communications, with Distinction

Selected Project Experience

City and County of San Francisco, Port of San Francisco Racial Equity Consultant, San Francisco, CA
7-11 Property Surplus Committee Napa Valley Unified School District (NVUSD) Communications and Community Engagement Consultant, Napa, CA
Antioch Unified School District (AUSD) Racial Equity Consultant Antioch, CA
City of Richmond American Rescue Plan Act Needs Assessment Richmond, CA
Oakland Unified School District (OUSD), McClymonds High School Modernization Project, Oakland, CA
MTC/ABAG Next Generation Freeway Study, 9 Bay Area Counties, CA



Carol Anne Carroll

RESEARCH DIRECTOR, CC&G

Carol is responsible for survey sampling, scheduling, and focus group recruitment and moderation, and shares responsibility for data processing and reporting/analysis. She is also a client contact and is involved in all project tasks. She is particularly known for great precision in her sampling and scheduling. She has performed such work for many clients, including Caltrain, San Francisco Controller’s Office, San Francisco Foundation, SamTrans, San Francisco Public Library, SFO, MTC, and many others. Prior to joining the field of research, she was a freelance writer and also worked with both adult and K-12 students as a private tutor.

25 years experience

Structure of Intellect (SOI) Certified
Precinct Inspector/Pollworker, San Francisco/Alameda
Alameda County Leadership Academy
NERT (Neighborhood Emergency Response Team)

Selected Project Experience

California Energy Commission – Vehicle Study (2015-2016)
Caltrain Recovery Survey (October 2020)
Caltrain Rider Surveys (Since 2007)
Capitol Corridor Surveys (Since 2006)
City Survey 2015, 2017, 2019
East Bay Paratransit Surveys (Since 2007)
Golden Gate Transit Recreational Survey (2015-2016)
Golden Gate Transit Rider Focus Groups (2016)
MTC Onboard Transit Studies (Since 2017) including work on SMART,
Sonoma County Transit, WETA (ferries), Union City Transit, Napa
Transit, Marin Transit, and SamTrans
Omniceil – qualitative medical studies (2020-Present)
San Francisco Public Library Open Hours Study (2012, 2017)



Shuyu Fang

SOCIAL IMPACT DESIGNER, MSS

Shuyu aims to amplify the voices of marginalized communities and address their needs through systemic and human-centered design interventions that drive collective action. She has served as a designer and design researcher for a variety of project types including community engagement, strategic planning and visual communication. Shuyu is skilled in synthesizing outcomes into informative and visually-provocative communication design. She is fluent in Mandarin.

5 years experience

MFA Design for Social Innovation, School of Visual Arts
BFA Jewelry Design, China Academy of Art

Selected Project Experience

Sarasota County Library and Historical Resources, Strategic Planning and
Visioning| Sarasota County, FL
Hartford Public Library, Programming | Hartford, CT
Pennsylvania Intergenerational Conference | State College, PA
Richmond (CA) Public Library, Staff Development | Richmond California
Bartholomew County Public Library, Master Facilities Planning and
Visioning |Columbus, IN

5. Past Projects

Question: Describe three (3) projects previously managed by the Proposer or proposer's project team within the last 10 years. Past work with library clients is highly desirable. Each project must be of the type and scope of services specified in this Solicitation. The descriptions shall include each item listed below.

- a. Project name;
- b. Project scope summary;
- c. Dates when the project was performed;
- d. Project costs;
- e. Proposer's role and responsibilities in the project;
- f. Proposer's performance on delivering the project on schedule and on budget;
- g. Proposer staff members who worked on the project; and
- h. Client name, reference, and contact info.

Enoch Pratt Free Library Master Facilities

BALTIMORE, MD

Library as a Community Platform: Baltimore's Marketplace for Healthy Community Growth

The Baltimore City, MD-based Enoch Pratt Free Library engaged Gensler, Margaret Sullivan Studio, and the Baltimore Neighborhood Indicators Alliance in a data-driven real estate and facilities master planning study to develop an extensive, system-wide plan that will provide analysis, guidance, and recommendations regarding service priorities with a focus on neighborhood community economic development catalyzed by a re-investment library facilities into the next 10 years. The Enoch Pratt Free Library sought a bold and aspirational plan that is future-focused and makes recommendations for services and library facilities growth by analyzing the existing 21 library neighborhoods EPFL serves and identifying service gaps and neighborhood development opportunities.

EPFL, under new leadership, had recently completed a strategic plan. Though our work was initially scoped as a Facilities Master Plan, our team applied a community-centric strategic planning approach to strengthen the outcome goals of the initial strategic plan. Our team re-positioned the strategic plan's operational framework to a Community Economic Development framework as a vehicle to position EPFL's embedded network of neighborhood branches as anchor institutions to contribute to upward mobility through place-based strategic initiatives strengthened by long term strategic partnerships. Additionally, our team created a recommended corresponding organizational structure, with updated staffing models and re-defined roles and responsibilities to activate the re-aligned system-wide re-imagining of people, places, and platforms.

Dates: 2022-Present

Cost: \$225,000

Role:

Strategist
Facilities
Master Planning

Staff:

Elaine Asal
Margaret Sullivan

**Project Delivered On
Time and On Budget**

Client Reference:

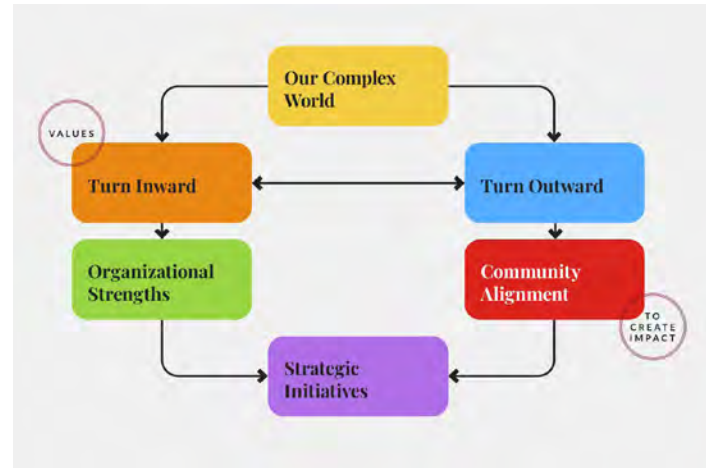
Heidi M. Daniel
Chief Executive Officer
Enoch Pratt Free Library/
State Library
Resource Center
hdaniel@prattlibrary.org
(410) 396-5395

The Context and the Call to Action

Although Baltimore has had a population in decline since 1950, there are signs of growth and re-investment that are contributing to a Baltimore renaissance. There is a citywide focus on digital equity, workforce development, and local entrepreneurship with a lens towards economic inclusivity. With a majority Black population, Baltimore's residents continue to suffer from significant segregation and wealth disparities as a result of historic red-lining and racist planning practices. The city agencies operate in a mindset of austerity, as a result of the diminishing population, diminishing tax base, and years of an entrenched "silo" mentality.

Despite these challenges, the city has many brightspots such as its vibrant arts districts, engaged institutions and community organizations, public space investments, and a healthy social innovation ecosystem as well as a stated desire for political leaders and non-profits to work collaboratively to achieve shared outcome goals. The MSS, Gensler, and BNIA Team implemented an asset-based approach that incorporated inputs and co-creation from a wide network of City Stakeholders at all levels of City and Library Leadership, and incorporated staff's creative contributions in their role as community advocates. This work coincides with a renewed energy of collaboration among all of the city agencies and partners our team engaged with.

Furthermore, EPFL had just completed a multi-million dollar restoration of the 200,000 square foot historic Central Library. This investment, made possible by State funding, created an equity challenge for EPFL. With little to no capital funding consistently allocated to capital improvements of neighborhood branches, the state of EPFL's facilities represented years of disinvestment that undermine the mission and values of the American Public Library. EPFL engaged our team to generate an aspirational vision to invigorate a re-investment strategy for a system-wide strategic facilities plan with a corresponding staffing model. Re-imagined with an abundance mindset for growth through building staff and partner capacity, this plan recommended that each location have a Director of Community and Culture; each location align staff skills and talents for the outcome goals of each neighborhood; and EPFL work with strategic partnerships to grow capacity and impact. As a result, this plan will strengthen EPFL's essential role as a convener,



connector and amplifier for all of the community-based assets in Baltimore to flourish in service to the community.

A Process Rooted in Urgent Needs and Imagining Possibilities

We implemented a methodology similar to what we are proposing for SFPL. This includes extensive qualitative outreach to understand current challenges and opportunities from a wide variety of perspectives (staff, leadership, community members). We worked with the Baltimore neighborhood indicators alliance to leverage local data and understand community health relative to each branch, as well as applying a 20-minute city lens to how the branches work together and support community health, education, and development. The team developed an urgency index to map neighborhood needs, relative to existing locations, in order to better understand opportunities for service growth. Deep dives and site visits helped build a holistic understanding of the existing branch needs, and what partnerships and activations may be valuable to increase overall utilization and community engagement. The urgency index provides a data driven lens for validating current growth opportunities and evaluating new community requests and proposals.

Field trips with leadership and staff to locations both in Baltimore and DC inspired new delivery and partnership models to learn from, while recognizing more adaptive and community-led modes of programming and event hosting. These case studies, as well as national examples culminated in a more intentionally partner driven approach for future

growth, in service of branches more focused on community programming and activation. Staff engagement was also critical to inform key placemaking components to consider across all branches.

An Aspirational Vision: Libraries as a Community Platform

The strategic goals for the library focused on Digital Equity and literacy justice, living your best life, being a center for culture and Community, Innovation and Entrepreneurship, and Youth Development/ Passion Based Learning. These strategic goals informed new roles and placemaking components that serve as launch points for community programming and engagement. System Wide partnerships with entities like Recreation and Parks, a local maker organization named Open Works, the Boys and Girls Club, or academic institutions such as Morgan State University could bring greater activation and alignment to existing branches.

For Enoch Pratt Free Library, the facilities master planning framework needed to be highly adaptable as well as practical. An ecosystem of Anchors, Nodes, Co-Locations, Storefronts, Mobile, Pop-Ups, and Program Partners provide a range of service location models and approaches across the system. Anchors functions as a sub-regional hub for EPFL programming and acts as a vital community resource point for both local and regional residents. With larger footprints, they can support more unique “destination features” ‘ such as incubator kitchens, co-working spaces, bi-lingual Storyville, climate justice lab, and a digital equity center. Nodes have a more consistent “one-room schoolhouse” footprint and support a wide variety of programming and activities with more multi-purpose spaces, embedded within their neighborhoods and supporting local residents. Co-Locations focus on future growth with greater alignment with new facilities either connected to Rec Centers, Academic institutions, schools, or non-profit organizations.

An Innovative Investment Strategy for Diverse Funding Sources and Sustainable Growth

Plagued by years of social infrastructure disinvestment, this plan will deliver an infrastructure for sustainable growth that will leverage all of Baltimore’s community partners to be active partners in the success. This will position the library as an essential connector and convener, contributing value to

the City to garner prioritized City funding. Furthermore, the plan delivered a comprehensive list of public, philanthropic, and public/private partnership funding sources for place-based and capital improvement plans in order to grow the library with all the funding sources available- federal, state, and local — to reverse the disinvestment due to years of systemically racist urban development practices.

[CLICK HERE FOR REFERENCE DOCUMENTS.](#)



Las Vegas-Clark County Library District Vision 2020 Strategic Planning & Implementation

LAS VEGAS, NV

We Don't Library Like We Used To!

The Context and the Call to Action

No other city, county or region in this country experiences the extreme booms and busts more than Las Vegas. The uncertainties and the exponential demographic shifts that occurred post 2008 in Clark County offers learnings relevant to understanding San Francisco's rapidly changing future demographic and the implications for social, learning, and workforce needs and, ultimately, for the city's library.

In 2015, Las Vegas was still coming out of the 2008 recession and continued to demonstrate stagnant recovery, growing economic disparity, a rapid increase in immigrant communities, and an immediate need to create pathways for middle class financial security.

In response, the Las Vegas Clark County Library District (LVCCLD) embarked on research with over thirty "early adopter" staff members to foster social impact in the context of an urban—or economic development—agenda that would galvanize recent program innovations, partnerships, and assets as well as activate the library's 30 urban and rural library buildings.

A Process for a Vision

This launched Vision 2020, which provided insights into customer demographic conditions; future competitors, such as Amazon, Google, Starbucks; and future growth and change for the library's business model. Needing a process for acting on these insights, the library was especially interested in Richland Library's "Library as Studio" methodology developed with Margaret

Dates: 2016-2021

Cost: \$200,000

Role:

Strategist
Designer
Professional
Development
Master
Facilities Planning

Staff:

Margaret Sullivan
Patrick Quattlebaum

**Project Delivered On
Time and On Budget**

Client Reference:

Danielle P. Milam
Former Director of
Development & Planning
(847) 302-5937
daniellepmilam@gmail.com

Sullivan Studio (MSS) , which is grounded in human-centered, community-driven and co-creation approaches aligned with a city's urban agenda.

MSS was engaged in 2016 to build on the Vision 2020 work, to design workshops with staff for co-creating strategic areas of focus, designing a system-wide implementation toolkit, and building the institutional confidence, competencies, and tools to activate the facilities 100% of the time for human-centered, community-focused experiences and strategic initiatives. MSS began by auditing and synthesizing a newly commissioned market segmentation analysis, a revolutionary approach for libraries, that revealed lifestyle behaviors combined with behavioral use-patterns of core customers.

With the synthesized analysis, MSS designed the second half of the strategic process to identify strategic areas of focus, such as defining future services, programs and collections to meet the needs of the complex community conditions. and to design workshops with staff for co-creating strategic areas of focus, designing a system-wide implementation toolkit, and building the institutional confidence, competencies, and tools to activate the facilities 100% of the time for human-centered, community-focused experiences and strategic initiatives.

MSS conducted a staff engagement workshop process to elicit deeper insights, asking: Who are we Designing for and Why? What are the Community Characteristics? What activities and programs will we provide? What are the outcome goals we envision for our community members?

A Bold Vision for Community Impact

It yielded a bold vision to grow the library business as a leader of the Vegas Valley, using the urban agenda concept as well as community economic development best practices, such as building and amplifying partnerships, aligning strategic priorities, and enhancing coalitions and funding sources.

Additionally, it:

- Provided LVCCLD leadership with knowledge for growing their market share, the ability to apply market segmentation patterns and behaviors to grow relevant services, and confidence for focusing their capital investment and facilities growth strategies.
- Allowed staff members to focus on their business growth

at a relevant localized community level while LVCCLD leadership developed curricula including for whole family development, new immigrant services, workforce development, and cultural programming.

- Set system-wide customer experience expectations and empowered the staff to design their customized community playbook, while aligned as a system.

Following this strategic work, MSS has continued to work with the District as library strategist, facilities designer, and staff development consultant. Serving as an integrated collaborator to the Executive Leadership Team, and in partnership with expert consultants for a series of consulting contracts, MSS's continuous engagement has been critical to the successful implementation of the Vision 2020 Strategy.

In 2018, MSS and Harmonic Design were engaged to work with LVCCLD and Nevada One Stop to generate a shared set of outcome goals, experience principles, and design a seamless service model. As partners to increase access to workforce development, Nevada One Stop was co-located in several District Library libraries. It was a win-win for families who could enjoy the library's family-centric and ESL services, but it was challenging for these two organizations, with vastly different institutional cultures and success metrics, to operate for the customer as an integrated partner. LVCCLD engaged

[CLICK HERE FOR REFERENCE DOCUMENTS.](#)



MSS and Harmonic Design to forge a new customer-centric service model co-created by the staff of both institutions.

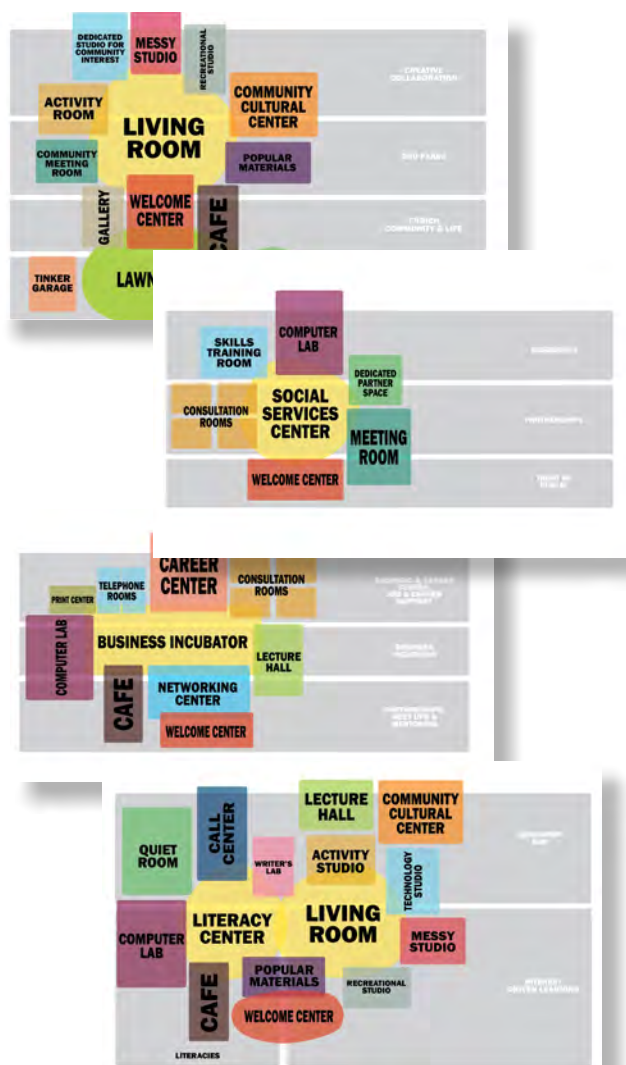
Subsequent projects have included the LVCCLD's innovative facilities master plan, its implementation and the design of two revolutionary facilities informed by placemaking and cultural relevancy—East Las Vegas and Mesquite. The trusted relationships, teachings, and inspiration MSS has contributed as an integrated collaborator and thought leader has allowed the ongoing professional growth and evolution of over 700 staff and strategic partners.

In a recent staff survey, 75% of staff believe this community-driven agenda is core to the library's role, and they are confidently aligned with Vision 2020's strategic areas of focus. Vision 2020 also grew foundation and development dollars, with an early childhood initiative based on Mind in the Making (Bezos Foundation), and teen and youth development out-of-school-time initiatives (Best Buy).

Most importantly for current conditions, Vision 2020 increased LVCCLD's visibility and credibility with the critical partners necessary for a collective impact model as Vegas comes out of the pandemic crisis. This includes working with Nevada One Stop to help significant numbers of unemployed find living wage work; and the Nevada Children's Museum on a strategy to address the 75% reduction in FNN early childcare providers for service industry families.

The strategy did what it was designed to do to generate a daily community impact: created adaptable facilities and a change-ready staff equipped to mobilize new services, as well as provided the tools for all staff to activate and optimize LVCCLD's resources.

VISION 2020 Strategic Activation Diagrams



Salt Lake City Public Library Strategic Visioning & Roadmap

SALT LAKE CITY, UT

Strategic Planning in a Deeply Weird World

Margaret Sullivan Studio (MSS) began working with Salt Lake City Public Library in 2016 with a Visioning and Programming contract to re-imagine three existing facilities. That work introduced The City Library to the human-centered, community-driven service design methodology. Informed by community needs research, community engagement synthesis, and an “imagining the possibilities” education, staff designed future customer experiences activating the library’s holistic service model (spaces, collections, technologies, staff skills and talents, and partnerships) in highly participatory workshops, designed and facilitated by MSS. Resulting in a deeper understanding the powerful role facilities perform to activate 21st century learning, staff were invigorated by their learnings, their contributions, and were affirmed when MSS was able to clearly

articulate their vision for the community’s future library experiences, rooted in patron’s needs and aspirations, in a qualitative and quantitative program narrative to inform future facilities design projects.

Peter Bromberg, Director of Salt Lake City Public Library, saw the value in this iterative and inclusive design methodology that built on the strengths and assets of the community and The City Library’s existing deep values-driven culture, and approached Margaret Sullivan with the following three “How Might We” challenges:

How might we apply this methodology to The City Library’s upcoming strategic planning process to create an adaptive organization to meet the needs of a complex, diverse community in a radically uncertain future world?

Dates: 2017-Present

Cost:
\$90,000 + \$300,000

Role:
Strategist

Master
Facilities Planning

Staff:
Margaret Sullivan
Patrick Quattlebaum

**Project Delivered On
Time and On Budget**

Client Reference:
Deborah Erhman
Acting Director
Salt Lake City
Public Library
801-259-1154
dehrman@slcpl.org



[CLICK HERE FOR REFERENCE DOCUMENTS.](#)

How might we professionally develop staff to be able to show up each day with strategic intention, and to confidently practice 21st century librarianship by adapting and responding in real time to the community's needs to create unique "customer services journeys," and "moments that matter?"

How might we use this process to co-create a flexible, adaptable Strategic Roadmap with Salt Lake City's community development ecosystem, including city leaders, community-based partners, staff, and board to embed collective impact, deepen the community feedback loops, and inspire strategic partnerships through shared social impact outcome goals?

Designing the Methodology: Setting a Revolutionary Process up for Success

MSS, having worked with Patrick Quattlebaum to create Richland Library's Library as Studio, invited his newly formed Studio to design the 1st of its kind Strategic Planning methodology to respond to Peter Bromberg's Call to Action. Over the next month, MSS, Studio PQ (Harmonic Design) and City Library leadership created a methodology, approach, tools, and five-phase, year-long work plan.

MSS and Harmonic Design managed the process, facilitated community engagements, designed the innovative participatory workshops and the innovative tools, and audited, analyzed, and synthesized the inputs to ensure the goals of each phase were met to meet the project's milestones. Because it was the first of its kind strategic

planning work undertaken by the library industry as well as the Salt Lake City Public Library, the team built in assessment and re-alignment procedures through weekly meetings to adjust the process as needed in real-time. Key to the success was creating a culture among the project leaders of encouragement, inspiration, openness, lack of judgment, collaboration, high trust, constant communication, and the "forgiveness of failing forward," critical best practices required of growth, change, and innovation.

The Impact: Revolutionizing the Library Industry through Community Co-Creation

The work resulted in the following:

A community and staff co-created a nimble Strategic Roadmap with a flexible set of guiding strategic areas of focus that have only been continuously "practice, prototype, assess, and refine" forming a dynamic adaptive organism in total service to the community.

Positioned The City Library as a lead convener, connector, and catalytic contributor in Salt Lake City's community economic development eco-system. SLCPL enjoys the community's trust, knows the community's needs, provides data-driven evidence in support of the community's needs, and brings partners together to design services to generate shared social impact outcome goals.

Professionally developed staff with human-centered service design techniques. SLCPL built radically inclusive practices of empathy, compassion, and sensemaking with storytelling and

designing customer journey narratives. This enables a “take action” entrepreneurialism through a culture of creativity, collaboration, and critical inquiry, rooted in designing experiences for all.

Professionally developed the staff to have the confidence, competencies and tools to embrace change, envision and design future patron services, and grow internal systems to create meaningful experiences for all patrons. This ensures short term and long-term work is in service to the community’s advancement.

Built in effective measurement and assessment tools in order to rapidly re-align institutional operations for relevant and specific strategic outcome goals, applying the deep understanding of the “in-real-time” aspirations, needs, challenges of patrons, partners, and the community to generate strategic impact.

Emboldened the value proposition of The City Library with a new Culture Statement (organizational values) Experience Principles (how to create differentiated and valuable customer experiences), and a re-commitment to the Mission. With these as the constants, The City Library staff is empowered with both a clear guide to how to approach services with shared expectations and accountability, and the entrepreneurial mindset, empowered by the tools and permissions to improve services, create new services, and to abandon services that are not impactful.

Generating Organizational Stability: An Adaptable Machine Embracing Change

MSS has been involved for over six years with The City Library, applying the inclusive design methodology as a library strategic consultant, community relationship building, designer, and inspirational staff facilitator. The City Library, led by Peter Bromberg and Deborah Erhman is also experiencing a leadership transition, as Peter Bromberg resigns to focus on his work with Every Library. It is through this that we are witnessing the most important aspect of this strategic work. With a confident Vision, Values, and Mission, the Strategic Roadmap is enabling a stable and healthy transition of leadership as Deborah Erhman becomes the Acting Director. The board, leadership, and staff continue to be guided by this groundbreaking work.

A Revolutionary Strategy creates a Revolutionary Master Facilities Plan: Library as Social Infrastructure

MSS continued to work with The City Library from 2020-2022 to generate the first Master Facilities Plan in the country to position the public library as an essential leader in equity-driven urban development. As a dense urban system facing affordable housing challenges, displacement and gentrification issues, and growing wealth and resource disparity, this plan built on the social impact strategic focus areas. The plan created a facilities approach to re-align existing facilities to be more impactful, and provided a growth strategy to introduce innovative typologies and services. Using the 15-Minute City structure, the design team and client team worked collaboratively to identify resource deficiencies related to quality-of-life needs. Additionally, a system of “Hubs, Branches, Sprouts and Seeds,” - mobile outreach vehicles, pop-ups, storefronts, and library-owned facilities - create an experimental system to “play” with ideas, co-create space with the community, and provide the library system a flexible framework for growth in a rapidly changing city. MSS continued to meet with community partners that informed the strategic work, strengthening shared impact goals. Furthermore, as a result of this work, the Mayor has championed the library as the development anchor in a series of city-wide development projects.

6. Work Approach Quality and Appeal

Question: Proposer must describe their overall work approach to successfully deliver the Scope of Work for this Solicitation, by addressing the quality and appeal of approach for delivering all work activities, including coordination and communication with Library staff, to meet project milestones and deliverable due dates within budget.

“WE HAVE TO IMAGINE A DIFFERENT FUTURE, EVEN IF WE WILL NOT EXPERIENCE THAT FUTURE OURSELVES.”

Dr. Angela Davis in conversation with Dr. Mary Wardell-Ghirarduzzi, President, San Francisco Public Library Commission

Today, our society is at a critical inflection point. The choices and actions we take will determine our collective future. Given the challenging and complex conditions in which we find ourselves, we understand this work to be a strategic planning process to align San Francisco Public Library’s 21st century library services with community ambitions and institutional goals. Recognizing the ambitious and impactful goals for this effort, we have assembled a uniquely qualified Project Team that will build on SFPL’s institutional strengths demonstrated in the 2016-2021 Strategic Plan, as well as champion SFPL staff’s deep commitment to their communities.

Our approach to managing the SFPL strategic planning process is tailored around co-creating a collaborative environment which is agile and fluid. Each activity builds upon previous activities to create ideas and deepen an understanding of the core issues that will inform the SFPL Strategic Plan. Through this process, we generate a variety of integrated deliverables including data analytics to provide clear evidence of current need and future demand, to illustrate the areas of San Francisco experiencing the most extreme social and economic disparities, library facility analysis to understand current use and future opportunities, and community asset maps to illustrate gaps and strengths of San Francisco’s current social impact eco-system. We will provide planning strategies to position SFPL as a leader in

equity-driven urban planning methodologies, prioritization diagrams and recommendations to launch a successful implementation strategy, partnering best practices and strategies to foster sustainable long-term partner successes, and clear guiding planning principles to create a shared decision-making structure when unexpected scenarios inevitably will arise. This process keeps the project moving forward within the defined schedule.

This strategic work will be conducted in six phases. The final strategic document will be delivered in December 2023.

- Phase I: Launch: Planning, Current State Research & Analysis
- Phase II: Discover: Information Gathering, Research & Analysis, and Community Outreach
- Phase III: Sensemake: Identify Strategic Alignments
- Phase IV: Iterate: Envision Future Community & Employee Experiences
- Phase V: Refine: Create Strategic Roadmap & Toolkits
- Phase VI: Document: Strategic Roadmap Feedback & Documentation

Phase I: LAUNCH

We begin planning with a process of collaboration to get to know each other and the details of each library’s objectives — goals, aspirations, current challenges, and a visioning session for the future. This stage helps determine the strategic vision and principles that guide decision-making throughout the process. We’ll develop a tailored engagement process to engage the community, SFPL staff and leadership, and stakeholder partners that sets up the next phase for success.

Key activities: planning and outreach; developing a communication and community outreach roadmap; analyze existing data and resources (mission and values; analyze emerging resilience needs as documented in the Hazards and Climate Resilience Plan and Climate Action Plan; etc.); bi-weekly meetings with client team.



Phase II: DISCOVER

This phase is where we deeply research and engage with the community, with SFPL staff and leadership, and stakeholder partners. Research takes the form of interviews, focus groups, workshops, surveys, and observational studies. We’ll uncover the challenges of existing facilities and current users; the condition and capacity of infrastructure, accessibility both physical and cultural/linguistic; and constraints. Our team will use a “data-driven, community-led” approach, working closely with community and key stakeholders to analyze the major drivers and needs of the project and devise strategies that are embraced and actionable. We’ll conduct site visits to understand local branch context and field trips to inspire next generation library experiences. We will continue community engagement throughout the duration of the project to refine and test strategic priorities.

Key activities: surveys and interviews with partnership stakeholders and key informants; surveys and workshops with staff and leadership; surveys and focus groups with external community; site visits to library branches; inspirational field trips; utilization studies; research library industry best practices; research city planning and development initiatives; bi-weekly meetings with client team

Phase III: SENSEMAKE

The synthesis of our research leads to insights and opportunities that drive towards strategic alignment. Sensemaking is captured in the form of a Discovery Report which may include library framework diagrams, identifying high-level ideas, areas of each library that are sacred spaces to be preserved, areas to be improved, opportunities as well as reimagining the future in our post-pandemic environment.

















Key activities: synthesis and analysis of qualitative and quantitative research; staff sensemaking and sensesharing; develop a Discovery Report to summarize insights and findings; recurring meetings with client team

Phase IV: IDEATE

We will test new ideas and concepts of how to organize the future strategic planning approach, accommodate new footprints, create new linkages, enliven the civic realm, consider resiliency approaches, and think about the library at different scales through an equity-driven lens. Through a deliberative, interactive, and collaborative process of evaluation, we can begin to select those strategies which merit further study and development.

Key activities: workshops with staff and leadership to strategically co-create vision and plan; recurring meetings with client team

WORK PLAN & PROJECT SCHEDULE

JAN	FEB	MAR	APR	MAY	JUNE	JULY
  KICK-OFF MEETING		  VISIONING WORKSHOP   KEY STAKEHOLDERS	  COMMUNITY-BASED ORGANIZATIONS	  INITIAL FINDINGS PRESENTATION   COMMUNITY MEMBERS		 
		COMMUNITY & STAFF ENGAGEMENT & RESEARCH				
PHASE I LAUNCH		PHASE II DISCOVER			PHASE III SENSEMAKING	
IDENTIFY STAFF & LEADERSHIP PARTICIPATION	UTILIZE SFPL DATA RESOURCES	INTERVIEWS & FOCUS GROUPS FOR STAFF, LEADERSHIP & STAKEHOLDERS		DESIGN USER INTERCEPTS / SURVEYS	ANALYZE QUALITATIVE & QUANTITATIVE DATA	
GENERATE STAKEHOLDER PARTICIPATION	MISSION & VALUES AUDIT	INCORPORATE THE STAKEHOLDERS		WRITTEN SUMMARY OF QUANTITATIVE DATA	BRANCH UTILIZATION STUDIES	
DEVELOP COMMUNICATION/ OUTREACH PLAN	REVIEW RELATED DOCUMENTS	USE DATA COLLECTION TOOLS			SOCIOECONOMIC MAPPING & URGENCY INDEX	
DEPLOYMENT PLAN WITH TIMELINE AND ENGAGEMENTS WITH SFPL LIAISONS	DEMOGRAPHIC ANALYSIS	COLLECT QUALITATIVE AND QUANTITATIVE DATA			SOCIOECONOMIC MAPPING & URGENCY INDEX	
	BEST & LEADING PRACTICES FROM PEER LIBRARIES				LOCAL PLANNING & STRATEGIC INITIATIVES	
	ANALYSIS OF CITY'S EMERGING RESILIENCE NEEDS					
PROJECT MANAGEMENT						

Phase V: REFINE

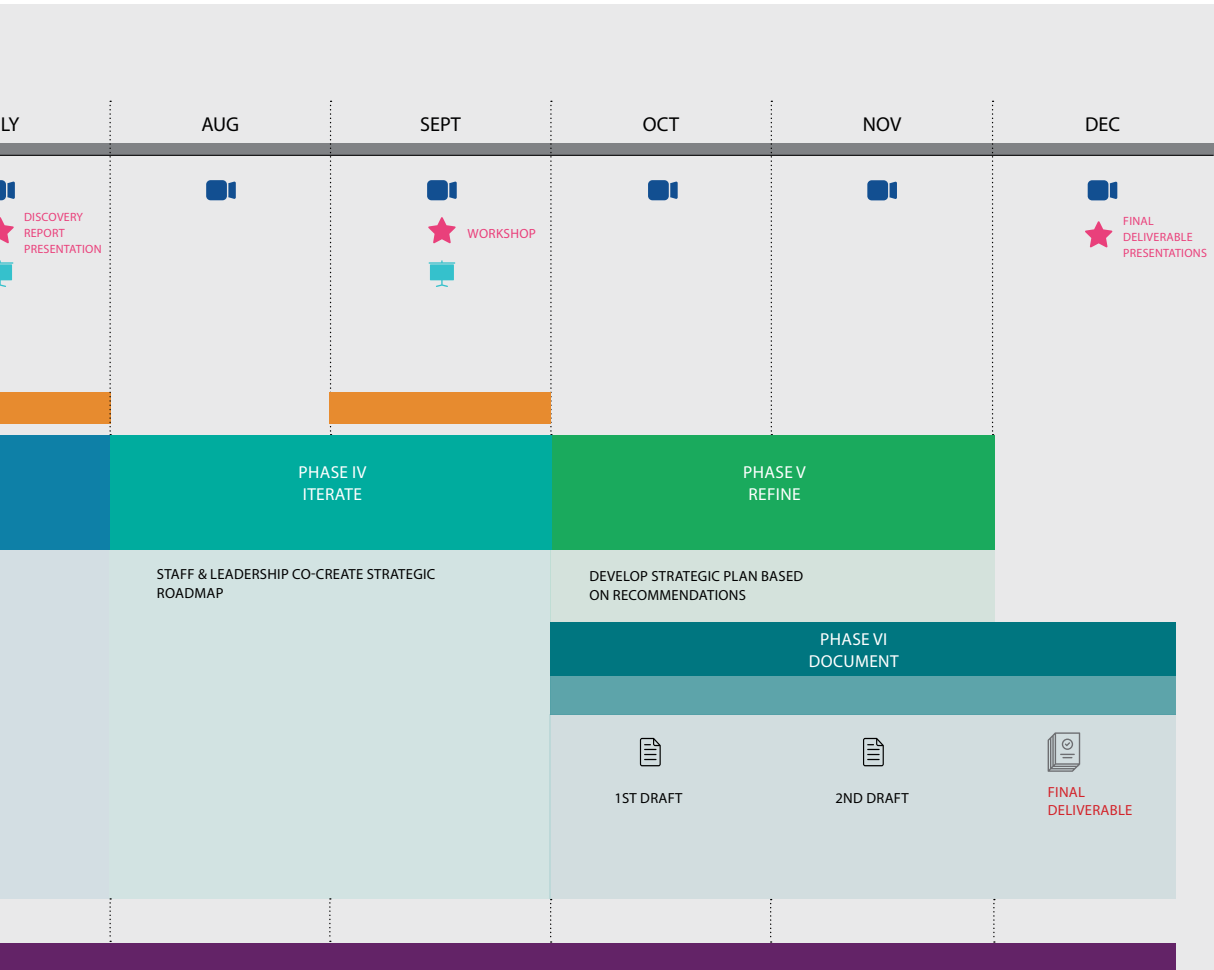
In this phase, the strongest concepts will undergo refinement. The plan takes shape, adding specificity through key principles, narratives, diagrams, and metrics. Community partners and members engaged during Phase II will be invited to help refine concepts. We will begin developing iterative drafts of the SFPL Strategic Plan for review.

Key activities: detailed development of strategic plan; workshop with staff and leadership to co-create and refine strategic vision and plan; workshop with community to refine strategic vision and plan

Phase VI: DOCUMENT

Upon approval of the strategic planning principles the documentation of the plan commences—preparing report drafts for review and feedback. Consultants will assist in preparing an implementation strategy with toolkits and resources for staff. The planning process and recommendations are documented in a report that captures the full analysis generated with a bold strategic vision for the future.

Key activities: draft final documents; working draft presentation to leadership; presentations to Board, Leadership, and the public



LEGEND

- VIRTUAL MEETING
- LEADERSHIP MEETING
- STAFF ENGAGEMENT WORKSHOP
- COMMUNITY ENGAGEMENT
- PROJECT MANAGEMENT

FINAL REPORT INCLUDES

1. Strategic Planning Document
2. Appendix



We will Deliver:

- A bold, inspirational Vision
- A confident Mission with a clear role and purpose for the San Francisco Public Library to lead a values-driven Social Infrastructure and Community Economic Development strategy, centering all.
- Values designed for radical inclusion, radical listening, and radical learning.
- An organizational operating system that will be the “Next Practice” for 21st century public library work in complex urban communities, embedding Coalition Building and Community Feedback Loops in San Francisco Public Library’s daily practice to continuously enable data and best practices to inform collections, programming, services, and capital decisions in a rapidly changing San Francisco.

This work will generate Strategic Outcomes:

- SFPL will be an institution designed by the community’s voices, adapting services in real time to evolving community conditions with creativity and collaboration.
- SFPL will connect, convene, and catalyze San Francisco’s public service ecosystem for amplified social impact in service to San Francisco’s diverse communities.

Empowering SFPL with an activation strategy outlined in the following Deliverables:

Strategic Planning Document

Vision

Mission

Values

Strategic Initiatives and Toolkits

Strategic Implementation and Assessment Goals

Facilities Realignment and Activation Strategy

Partner Relationship Strategies and Guidelines for Sustainability and Success

Appendix

Strategic Process Worksheets

Assessment Methodologies

Community Acknowledgments

About the Process (Discovery Summary)

Audits, Inputs, and Analysis (Discovery Summary)

Demographic Analysis (Discovery Summary)

System SWOT Analysis

Business and Operations Scenarios

Approach to Project Management

Strategic and innovative work is a team sport. We value co-creating and partnership. Our methodology is participatory and interactive. Strong project management is about communication, leveraging the talents of the team, and supporting every team member to ensure the process runs at the agreed upon pace. In strategic work, this requires sophisticated project management expertise. SFPL will benefit from the experience and breadth of Gensler, the expert experience MSS has had at creating new methodologies that require real time re-direction, the deep community trust of Contigo Communications, and the market analytics expertise of CC&G. Gensler will provide project management throughout the different phases of work, including managing the sub-consultants.

We believe in a consistent and streamlined communication approach to make sure information is shared as efficiently and quickly as possible. At project start-up, we will establish “ground rules” to govern communication and reporting throughout the project process. Once agreed upon, the Project Team will document the communication protocol and distribute for team use. Gensler will coordinate dissemination of information provided by Client to the project team, communications from the project team to the Client, and submission of all deliverables.

For the first two phases, we’ll create a rhythm of bi-weekly hour-long virtual meetings with SFPL’s strategic project management team. These touchpoints allow for planning, informal strategic conversations, clarifications, reflections, and re-directions in real-time, and will continue until Phase III, when the frequency will be assessed.

Our approach is to create space at the table for diverse perspectives to debate ideas and provide opinions and options when appropriate. We approach problems quickly, pro-actively, and with curious minds and compassionate hearts. We have developed tools and techniques to insulate our projects from pitfalls—daily communications, along with the close working relationship we establish.

We focus on project management with the following approaches:

Caliber of People. The team we have proposed for your project is highly qualified. As Project Co-Leads, Michelle, Midori, and Elaine are responsible for the day-to-day efforts. Midori will serve as the point-of-contact with SFPL and our team to keep the project on-schedule and within the established budget.

Solidify Scope. It is paramount to clearly define and agree to the project scope at the beginning of the project. Project goals and priorities, and the strategies to accomplish these are set from the start. Once defined, it is important to avoid or manage scope creep. Potential risks and mitigation actions will be identified and addressed, and changes from the baseline plan are evaluated for impact to schedule and cost.

Be Realistic. At project start, it is critical to set realistic completion dates to ensure we are working on an accurate and manageable schedule.

Clear Roles and Accountability. Workstreams and tasks will be aligned within the partner team through a roles and responsibility matrix. A roadmap and regular communication and check-ins will ensure a fluidity of conversations and efficient delivery. Gensler will help facilitate the decision-making process through an agreed upon “decision matrix” to target critical decisions at the correct time.

Building On Each Other's Strengths. This is a highly collaborative process and a highly collaborative team. Our goal is to make sure we are amplifying our relative strengths through the work, and bringing our best collective selves to this project. We will adjust as we go, to manage the complexity of the task at hand, and ensure the team is able to deliver effectively and efficiently.

Communicate, Communicate, Communicate. Team members are in constant communication with one another. Virtual communication is a natural part of our process. The team utilizes a variety of tools (such as Microsoft Teams and Sharepoint) to streamline project management and facilitate communication on projects—virtually and in person—tailoring the process to the client's preference. We use a virtual whiteboard tool (Miro) to collaboratively facilitate workshops, townhalls, or as an on-going communication

tool between stakeholders and the team. We also have the expertise to leverage tools like video, websites and apps, digital guides, QR codes, VR/AR for rich participant engagement.

Approach to Community Engagement

To ensure diverse and robust participation especially from disadvantaged and traditionally hard to reach communities, designing an equity-minded community engagement strategy with SFPL is critical. Every touchpoint with a San Franciscan is an opportunity to listen and learn. With the deep community knowledge that LBE's Contigo and CC&G will contribute, we will engage with additional community organizers and partners to galvanize the trusted networks that already exist in San Francisco's neighborhoods. Our community' engagement work with SFPL will not only be successful, but also visionary, thought-provoking and meaningful as it will help ensure library resources are designed to better serve diverse residents that are often left out of planning processes and as such denied access to available resources.

With a team that teaches organizations conflict resolution techniques and racial equity training, we are confident that we will create the conditions for all participants to feel valued. Holding tension with others that have different life experiences is essential to racial equity work and developing shared foundational understanding of the benefits of collective planning and work. Our racial equity experts will bring skillful facilitation and engagement practices that help participants hold tension as they envision better solutions and systems, learn to leverage the expertise of diverse staff, and better serve all users.

Successful engagement will connect with the broad diversity of users, nearby businesses, neighbors, and residents. We strive for a transparent public discourse that:

- Engages a Robust Dialogue
- Promotes Racial Equity, Diversity and Inclusion
- Establishes a Transparent Process
- Builds Trust and Relationships
- Flows Seamlessly from In-person to Online Tools
- Is Data-Driven and Human-Centric
- Targets Outreach to a diverse constituents
- Continues the Conversation Beyond the Project

Our team will integrate a variety of engagement and planning tools including user surveys, idea submission, feedback loops, and user voting, and using the interactive “town hall” techniques, we will encourage participation, inclusiveness, and transparency in the process. In addition, our team can assist SFPL in the design, launch, and maintenance of a website to distribute strategic planning information and serve as a repository for graphics, presentations, and reports.

Our team brings a dynamic set of tools, and a team of individuals with strengths to facilitate participatory, energetic, empathetic, and meaningful community engagement, executed with justice-centered inclusive practices. The process will also leverage community assets, including community leaders and community-based organizations alignments to result in a collaborative community impact model that strengthens the role of the library, facilities, and partnerships.

At the onset of the Project, we will collaborate with SFPL to develop a Public Outreach and Engagement Plan to outline responsibilities, communications coordination with SFPL, and plan deliverables. The key components of the outreach program will be:

1. Conducting a community scan of area stakeholders (forming the basis of our project’s communications and engagement list)
2. Identifying and enlisting the support of trusted community partner organizations to help engage hard-to-reach participating in the listening tour
3. Developing and maintaining regular and transparent two-way communications to effectively convey project progress, including meetings and communications prior key milestones and strategic plan approval

By identifying and engaging a few select key partners that have demonstrated success in serving and engaging diverse populations in San Francisco, such as low-income, non- and limited-English speakers, disables, seniors, LBGTQ+ and BIPOC community members, we will be better positioned to reach these groups. We also plan to compensate up to

five community nonprofit partners for their time, effort and possible use of their community non profits spaces.

Our team applies an Asset-Based Community Development approach that uses strengths, motivation, and small group conversations to create safe, comfortable environments to invite all to contribute. Our engagement techniques include Directed Storytelling, Customer Journey Mapping, AEIOU Observation techniques, Case Studies, Service Safaris, and potential tools designed with SFPL.

We are out-of-the box designers and consultants employing experience and “take action” techniques to build on these for outreach best practices. We will:

- Build from previous processes
- Utilize current SFPL structures spanning mobile, online, print and in-person methods
- Work with the SFPL to conduct multilingual approaches
- Amplify messaging using existing social media outlets (City & SFPL Communications Departments, Library, Parks and Recreation, etc.)
- Engage with existing City boards and commissions
- Develop engagement materials and collateral for events and organizations
- Engage SFPL’s community ecosystem: school districts, non-profits, business community

For **one-on-one key stakeholder conversations**, we apply a systemized approach, framed around the same questions, as designed with SFPL’s leadership team, to both encourage candor and to lift common themes. This will generate a data-driven input set to reveal key community alignments.

With **focus groups**, we apply best practices for communities to share their ideas and honest reflections through small group conversations. We recommend 8-10 participants per group to allow for all present to meaningfully participate, but will work together with SFPL to determine the target composition and number of participants for each group. Much has transpired since the pandemic, and some of our discussion will tease to what extent people’s understanding of “library services” has shifted since the start of the pandemic. Creativity in visioning the future will be encouraged through ideation, thought-starter worksheets or thought-provoking questions, and organizational brief exercises. This encourages



community learning, fostering deeper dialogue, to result in shared challenges, aspirations, and future library roles and services. Focus groups will primarily be held virtually as that has been the new norm in our post-pandemic environment, but some focus groups will be in-person for target populations that are not technologically literate or have access to the internet, such as seniors. We will work with SFPL and our engaged non-profit partners to identify what works best for each population target.

We plan to deploy both a library **patron survey** and a **community survey**. The surveys will be available in multiple languages and will be deployed in respondent-friendly formats, including in-person and online. Collectively, our team members are fluent in Spanish and Mandarin, and are able to source other language support as needed through the local Gensler office. Our questions garner valuable insight into community member's values, priorities, and challenges. We ask questions about their life priorities, hobbies, how they spend their free time, what they love about their communities and how they use, or would like to use, their neighborhood library. These questions can build on the behavior patterns of SFPL's current insight. From these robust research efforts we anticipate having ample data to be able to analyze the needs of both library users as well as community residents who do

not currently use the library but will likely be future users, as the SFPL branches evolve. Our two-pronged research effort will allow us to provide a quantitative research analysis which clearly identifies which library attributes are important to both library users and non-users. This will be a key finding since it will identify what features of the SFPL library are most valued by members of the community, whether they currently use the library or not. Additionally, the quantitative data will be segmented geographically by supervisorial district which will allow SFPL to visualize specific needs and preferences by geographic area. Each of these quantitative research efforts will provide important, statistically reliable, context that will play a key role in the development of the strategic plan for SFPL.

One of the most insightful tools we deploy is a **Leadership and Staff Questionnaire**. Staff members will complete these during Phase I. This set of nine questions, completed by Main and all neighborhood library location team members, reveals the deep knowledge that staff have about their communities, the user characteristics, existing and future partnerships, and their vision for their community members. This is one of the most important tools the team will use to understand and validate unique community characteristics and engage staff meaningfully at the beginning of the process.

Approach to Engaging Stakeholders and Partners to Identify Strategic Alignment

In addition to the learnings from the community, our process will learn from peer leaders across the City. These engagements are critical to educate peer leaders about the role of the 21st century library, communicate how the library can be synergistic and effective partners to amplify shared community outcome goals, and hear from them what their vision of a prosperous, just San Francisco will be.

These formats can be one-on-one key informant interviews, small focus groups conversations, and/or a series of workshops. We encourage the gathering of community-based organizations and library partners to participate in focus group conversations and workshops to articulate shared outcome goals and alignments, while also communicating strengths and gaps. As evident in all our strategic work with libraries, these conversations will reveal clearly SFPL's contributing role, leveraging SFPL's already trusted

position as a powerful convener, connector, and respected coalition builder.

Existing Documents and Local Initiatives Audit

Our team will collect existing relevant SFPL documents. We will conduct a systematic analysis of the documents using our tools, such as the team's archival analysis checklist tools and qualitative analysis technique. The analysis will uncover themes that capture the current alignment of policies, procedures, and communications with the library's mission and vision, as well as implications for meeting stated racial equity goals.

Examples of documentation include relevant policies, procedures, strategic plans, brochures, videos, flyers, research reports, demographic data, outreach communications, hazard resilience and climate action plans, and other documents deemed important to the project. This analysis will illustrate a baseline "current state" to serve as a marker for the "future state" visioning.

Readings & Research

Strategic work is a privilege enabling us to deepen our knowledge, and broaden our learning for what SFPL will be for future generations. In addition to the tasks outlined

in the RFP, we will encourage all team members to engage in readings of seminal industry papers, as well as engage in study about community economic development work, collective impact work, the United Nations vast body of work on human development, equitable practices, Sustainability Goals, and their recent Happiness Report assessments. Team members are well-versed in some of the most important recent research that can benefit this work, including social infrastructure, 15-minute cities, and the science of happiness. Gensler and MSS have also been investigating Enriched Environments, the science that proves that beautiful, natural, and active environments stimulate the brain to stimulate a sense of social safety and increased learning. These are the same principles that were applied to developing the Public Library Association's Every Child Ready to Read principles and can be powerful knowledge to deepen SFPL's Value Proposition.

The team is also deepening our research and knowledge around the role public libraries will play as community economic development engines, applying social impact metrics proven more effective at building social capital than conventional public library metrics. These practices are also already embedded in Connected Learning principles that center the teens, build their healthy eco-systems, and leverage partnerships. This is happening in The Mix daily, with poetry slams with Valencia 826, for example. With ten years of learnings, we can take the "Learning Lab" work to scale, applying practices to all ages and stages of growth.

Finally, the Federal Reserve Bank of San Francisco issued a monumental Call-to-Action two years ago that proves the impact of Creative Placemaking to foster community wealth and health, titled, "Creative Placemaking in Government: Past and Future"

Our team embeds these practices of Placemaking in our inclusive design methodology, and looks forward to amplifying SFPL's impact with the strategies outlined in this seminal body of evidence.

Designing an Organizational Strategy – Going Beyond Coordination and Communication with Staff

The Project Team will work with SFPL to create a successful SFPL internal organizational strategy. Ready implementation and sustained culture growth will result from service design



techniques this team will introduce to SFPL. Organizational change begins from Day 1 of this process as we will engage leadership, community, staff, and other actors holistically within a participatory design process.

We propose a series of highly participatory staff and leadership workshops to co-create strategy, applying human-centered service design techniques. We will carry over learnings from similar projects with Salt Lake City Public Library Strategic Roadmap, Las Vegas - Clark County Library District's Vision 2020, and Prince George's Memorial Library System's successful "Anti-Racist Library" strategic roadmap (see, Question 5), and use those engagement workshop "modules" as case studies, incorporate the plethora of experience this team brings, and customize a workshop strategy for SFPL. Our team will be able to continue the professional development through the iterative process, applying the exact methodology staff and leadership learned and applied.

Bold Visioning & Futures Strategy

The most successful strategic work is when the team engages in visioning at the beginning of the work. Our team brings a plethora of interactive worksheets and workshopping techniques to challenge ourselves to begin this work with the boldest, biggest, and grandest visions that will energize and encourage everyone to be their most creative, innovative contributors throughout the process.

This also provides the team time to understand the future social, technological, economic, environmental, and political forces that will disrupt the industry through future scenario-creating, applying research such as ALA's Future of Libraries to benefit this process. Scenarios are a great tool during strategic work. They are one of the best, and most fun, tools to prepare our institutions for uncertain futures. Our strategic approach is nimble and co-creative, involving the perspectives and talent of your organization and the greater community to explore possible futures together. As we partner closely, we will explore different models for how the library's services and ways of working may evolve to achieve strategic objectives.

Benchmarking, Case Studies, & Field Trips

Our team will deliver benchmarks and case studies of public libraries and community based organizations that have

embraced a community economic development strategy. This enables a more substantive critical inquiry approach by understanding peer organizations' community's conditions, that organization's "current state" when the strategic work began, and the time and processes it took (is taking) to achieve the strategic vision. Traditionally, in public library strategic planning, the "benchmarking" methodology is used to compare similar sized organizations for operational metrics and to identify "best practices." As our work focuses on "next practices," we will use these comparative studies to illustrate how impactful library strategic plans have propelled the industry forward. We will apply these learnings to this project, and build on the community-centered, outcomes-oriented goals to structure SFPL's, strategic work, as a national leader in innovative library initiatives, to continue to add "next practices" to the library industry's evolution.

What we have learned from analyzing peer library's strategic work is that Year One is focused on "Building the Culture." By the end of the first year of implementation the entire library organization is equipped to live the organizational values and know how to listen and learn from the community. Year Two is focused on "Prioritizing and Prototyping" strategic initiatives to "Really Know the Community," and learn how to assess and measure success with a service design, community-centered, "feedback loop" competency. And the final year is "Refine and Embrace" in order to "Build the Business." With this initial investment in organizational transformation, the library's impact will grow exponentially, based on evidence of this approach with peer urban libraries including Richland Library, Salt Lake City Public Library, Fort Worth Public Library, and Las Vegas-Clark County Library District.

Additionally, we will identify place-based local and regional organizations that are engaged in aligned mission-driven work to visit and analyze as case studies. These visits 1) enable our team to learn how aligned organizations in San Francisco excel at their work, and how they activate their staff, partners, places, and resources for success 2) enlighten the team with even more knowledge of community needs by seeing how these organizations are filling gaps in the community with their deep knowledge of overlapping constituents 3) create an opportunity for SFPL synergies,

partnerships, and program amplification to strengthen the City's social impact eco-system.

These benchmarks and case study visits have been important catalysts for organizational change. When Richland Library wanted to introduce a culinary kitchen into the design and programming for the Northeast location, we first did this benchmarking and case study research. The client and design team spoke to the leadership teams of the two "best practices" in library culinary kitchen programs at the time—the Philadelphia Free Public Library Culinary Literacy Kitchen and Hartford Public Library's workforce development partnership cafe with Forge City Works. We also visited the University of South Carolina's nutritional culinary kitchen to learn about their curriculum, which informed our program and facility design. The visit also resulted in a system-wide program partnership with Richland Library and the University of South Carolina's culinary programs.

Most recently, the Gensler/ MSS Design Team hosted the Enoch Pratt Free Library to two full days of Case Study visits in Baltimore and Washington, DC. These visits to Community-Partner Incubators (The Arc), Maker Spaces (Open Works, Fast Forward U), and Social Impact Co-Working Spaces (Impact Hub) were instrumental in re-aligning every team member's understanding, with shared language and experiences, of how the facilities could work harder for the communities through facilitation and activation.

Qualitative Analyses

Collectively, our team is expert at synthesizing complex data to reveal themes that are the clear inputs that drive the vision. This work starts with organizing the data in a meaningful and systematic way and can be strengthened with strategic frameworks that organize the information into goals, including social frameworks (affordable housing, food justice, child-care, transportation, etc.), experiential frameworks (educational, social, workforce, cultural, etc.), and operational frameworks (collections, technologies, partnerships, and staff skills and talents).

Resulting in clear themes of need, alignments, opportunities, and pattern of communities, human behaviors, and individual's common aspirations, these data sets will inform the exciting parts of this work: Envisioning the Future! Armed with evidence, educated with possibilities, the strategic

framework and re-imagined SFPL service model for a bold vision will emerge in Phase III, and the services will be designed to "test" and operationalize this vision in Phase IV.

Quantitative Analyses

Quantitative data will be analyzed in multiple ways. The survey data will be analyzed and described with descriptive statistics. Document audit and interview data will be categorized into themes and described according to communications, equity, and inclusion barriers. Branch utilization metrics such as circulation data, door counts, wifi or computer usage, as well as active cardholders will serve to capture existing strengths and weakness, and reflect bright spots or pattern shifts. Existing service locations may be overlaid on other community development parameters such as demographics, anticipated growth, or areas of investment. These maps serve as a strong foundation to determine future growth opportunities, and align future typologies in a data driven way.

Presentations

Our team will look forward to presenting this bold vision in support of its successful implementation to boards, staff, community members, City leaders, and community partners. Our report deliverables will be provided at milestone phases in digital formats, as outlined in our deliverable schedule. Presentation and report documents will be provided in a graphically compelling and clear way, with clear documentation of process and inputs to support transparency and clarity in communications. Presentation of content will be done by a mix of in-person and virtual participation with travel as required by non-local team members.

7. Work Approach Problem Solving

Question: Proposer must describe their understanding of potential project/task issues and constraints and approach to encouraging diverse, robust participation, including participation from disadvantaged and traditionally hard-to-reach communities.

It is critical to ensure diverse and robust participation especially for disadvantaged and traditionally hard-to-reach communities. This is why we start with a community scan and the identification of trusted community organizations, which includes developing working partnerships with them in a formal way. These will be selected based on their ability to engage traditionally hard to reach communities. This strategy helps to mitigate the issue of many people not being or feeling meaningfully engaged, as those helping to facilitate the engagement will be trusted partners.

Our approach is built on creative problem solving, sitting at the intersection of deep and broad experience, nimble and adaptive response, and a learning and empathetic mindset.

The engagement approach will start with community building exercises designed to establish an environment of shared knowledge construction as it relates to racial equity, diversity and inclusion. This will reframe the conversation and understandings regarding racial equity and how race has historically disproportionately impacted certain groups. Most important to this process is a shift away from individualistic understandings of inequity and access towards an analysis that considers historical patterns of devaluation/hyper-valuation that impact groups categorically.

Building a sense of shared understanding of concepts and norms will allow us to draw connections between our collective socialization toward “difference” and the consequences of the patterns of miscomprehension. We will work to expand our collective capacity to hold the complexity of these issues, incorporating some untaught history if needed to pull in macro and local context.

Moreover, the research conducted on this project will ensure statistically reliable results across all eleven supervisorial districts, including representation from each library branch and the Main. The outreach and research materials will be available in multiple languages – English, Spanish, Chinese, and Filipino. Patron surveys will be designed to be brief with multiple options for completion, including in-person, self-administered, or online. Minimum sample sizes will be established to ensure that disadvantaged, and traditionally hard-to-reach communities, are well represented. Our experience conducting this type of work in San Francisco is extensive, having completed community research projects for SF Library, SF Department of the Environment, the SF Municipal Transportation Agency, and the SF Controller's Office.

This Team has been leading the library and planning industry in deepening community engagement to reach community members who often are not able to participate in “conventional” community engagement methods. We will engage in multiple techniques to invite and cultivate participation. Below are examples of effective techniques our team has employed.

1. We are from these communities. Contigo Communications owner and principal Susana Razo was born and raised in San Francisco. Others on the Contigo team also have deep roots in San Francisco and serve on San Francisco nonprofit boards and commissions, as well as a neighborhood association. This level of knowledge, particularly working with nonprofit boards that serve low-income, diverse and disabled community members gives us many insights into San Francisco micro-communities.
2. We know we must engage with trusted community leaders to reach the populations that may not have a trusted relationship with the library- yet. This has been successful by working with trusted political leaders in Black and Latinx communities in Cleveland, Ohio; Wilmington, Delaware; Omaha, Nebraska; and Las Vegas, Nevada and the San Francisco Bay Area. This approach builds engagement, fosters trust, and cultivates future library users.
3. We must engage with community-based organizations that represent the constituents that we want to reach. Using this approach in Madison, Wisconsin; Prince George's County, Maryland, Anne Arundel County, Maryland; New Haven, Connecticut, and Hartford, Connecticut, MSS and Gensler have found more successful outcomes. These groups are also another avenue to more efficient direct connection to these organization's community members.
4. We must meet them where they are. Our local nonprofit partners will help to guide us to those locations. One of the best ways to meet community members where they are is by going to the schools and community centers. This tactic worked in Pleasant Hill, California, and Stockton, California, where the under-represented communities and their families were not attending any of the planned community meetings, but were loyal users of the community centers.
5. We must speak their language. We must engage the entire community. The research conducted on this project will ensure statistically reliable results across all eleven supervisorial districts, including representation from each library branch and the Main. The outreach and research materials will be available in multiple languages – English, Spanish, and Chinese. Other languages if needed will be identified during the outreach planning process with SFPL and confirmed with community nonprofit partners. Patron surveys will be designed to be brief with multiple options for completion, including in-person, self-administered, or online. Minimum sample sizes will be established to ensure that disadvantaged, and traditionally hard-to-reach communities, are well represented. Our experience conducting this type of work in San Francisco is extensive, having completed community research projects for SF Library, SF Department of the Environment, the SF Municipal Transportation Agency, and the SF Controller's Office.

8. Work Approach Adversarial or Difficult Situations

Question: Approach and procedures for contending with the public in adversarial or difficult situations while producing high-quality deliverables.

We expect for there to be tension in our discussions at times as people walk with their unique life experiences, which vary widely. It is not our intention to negate people's experiences, but to create an environment and discussion where differences are heard and understood for the complexity they hold. We will design interactive exercises and discussion that shift people away from individualistic understandings of inequity and access towards an analysis that considers historical patterns of devaluation/hyper-valuation that impact groups categorically. Libraries need to serve whole communities and groups and not just individuals, so this will be reflected in how we contextualize the planning process.

We have tools and techniques for behavior dynamics.

Our team will:

- Strategize with the partners/ libraries ahead of time to anticipate adversarial situations. Often, we find this can be situational, and scenario planning is critical.
- Give space for ideas to be contributed with skilled facilitation and engagement designed to lifting up the voices of all participants, particularly those from historically underrepresented groups.
- Co-create with the community. We will encourage small group and constructive engagement with a variety of platforms, applying best practices of meaningful engagement strategies.
- Employ an Asset-Based approach. By starting with focusing on the strengths of the City, the strengths of the people, and the strengths of the library, our team will set a positive tone for the gathering.
- Inspire with Conscious Leadership and a Bold Vision. When library and community leaders attend and present

at these sessions, they can set a positive tone by inspiring with a bold vision, communicating expectations, inviting constructive participation, and genuinely listening.

- Educate that the role of the public library is a both/and model. Folks are often nostalgic about libraries and will often come to these meetings thinking they will “lose” something- conversations and workshops can be planned to ensure that they will continue to enjoy their relationship with the library and invite them to be a valuable contributor to the future for all of their fellow community members.

Contigo’s Susana Razo, together with facilitator and racial equity consultant Milton Reynolds, have demonstrated great success in managing difficult projects. Mr. Reynolds worked with Antioch Unified School District (AUSD) after the ACLU of Northern California conducted a successful litigation process against AUSD for gross racial disparities in disciplinary suspensions and expulsions. Furthermore, the district was mandated to engage in three years of equity and inclusion, school climate work that was to include district administration, teaching staff and some selected classified staff that had direct contact with students.

Both Mr. Reynolds and Ms. Razo worked with Oakland Unified School District (OUSD) and provided strategic communications, messaging, community outreach, meeting preparation and facilitation support services to OUSD and the District’s newly formed Surplus Property 7-11 Committee (“7-11 Committee”) comprised of volunteer local residents, community organizers, non-profit leaders, union teachers, parents and others with specialties in real estate, education, non-profit organizations and local government. The committee was tasked with reviewing five properties and making recommendations to the School Board as to whether the properties were no longer needed for instructional uses and considered as surplus property. These properties were located throughout the District, including two in East Oakland. The Committee’s process was successfully supported resulting in clear recommendations to the Board about which properties could be surplus and which could be retained for community and education uses, all during a time when Board meetings were often shut down due to controversy on other School District matters.

As another example, for public Meetings, people consistently show up adversarial. We take care to ensure our public presentations encompass a statistically reliable cross representation of residents. Our outreach and research plan will be clearly developed and transparent to both library staff/management and to any other interested parties. We have experience presenting public facing, data-based findings, for numerous agencies including: the SF Public Library, SF Paratransit, SFO, the Metropolitan Transportation Commission, and others. This experience will allow us to deliver and defend the strategic plan findings from this project effectively and efficiently.

These successes are reflective of the combination of “art and science” of community engagement that combines meaningful listening and engagement with the historical frameworks and insights of several decades of racial equity work. With a team that teaches organizations conflict resolution techniques and racial equity training, we are confident that we will create the conditions for all participants to feel valued. Tensions aren’t always negative. The team has applied techniques that use the tensions to deepen community conversations and facilitate folks to hold tension with each other around complex issues as they work towards shared vision-making that addresses collective needs.

Our community’ engagement work with SFPL will not only be successful, but also visionary, thought-provoking and meaningful as it will help ensure library resources are designed to better serve diverse residents that are often left out of planning processes and as such denied access to available resources. Our work designs positive experiences, and with intentional design, we demonstrate the benefit of engaging in the best practices for inclusion. We create the conditions for communities to flourish, whether with communities to envision the future library, or in the building design that vision informed. SFPL is a gift to all residents of San Francisco. Our team will honor that.

MQ 5

Price Proposal

Attachment 6 - Price Proposal Template

Department:	San Francisco Public Library
Sourcing Event ID:	000007236
Proposer's Name:	Gensler, MSS with Harmonic, Contig
Instructions:	Proposers shall complete all YELLOW cells in their entirety and bid on all items in this worksheet. Failure to do so will result in a rejected Proposal. The total points allocated to the Proposed Price shall be determined by the PROJECT COST TOTAL compared to the Evaluated Price Proposal methodology per RFP Section VII(A) Price Proposal

Defined Scope - Deliverables Based Price Proposal

Activity Description	Cost Estimate	Submission Date (Days after Notice to Proceed)
Task 1: Outreach, Communication, and Engagement (Attachment 1 City's Contract Terms, Appendix A)(i)(A)		
Specific Activities:		
Planning and Outreach: kickoff meeting; develop a communications and community outreach roadmap	\$ 7,000	
Audit existing resources, research library best practices	\$ 18,000	
Internal Engagement: Interviews, Surveys, Workshops and Digital Outreach with Staff (up to 4 in person; 2 virtual); Leadership (up to 2 in person); Partner Stakeholder/Key Informants (up to 12 interviews)	\$ 105,000	
Community Engagement: Focus Groups (up to 15 sessions; 8-10 participants per session; up to 6 in person; up to 5 with community partners); Citywide Resident Surveys (11 supervisorial districts; up to 350 completes)	\$ 162,000	
Branch Site Visits & Field Trips (up to 12 representative branches; 1 day field trip)	\$ 51,000	
Utilization Study via Branch User Intercepts (750 completed surveys; all 27 library branches + the main represented)	\$ 50,000	
Deliverable(s): Communication and Deployment Plan, Document Audit, Conducted Community Engagement, and Written Summary		
Invoiceable Amount:	\$ 393,000	270 Days
Task 2: Analysis (Attachment 1 City's Contract Terms, Appendix A)(i)(B)		
Specific Activities:		
Citywide Resident Survey: analysis with emphasis on supervisorial district rollups; segmentation analysis	\$ 58,000	
Branch Metrics and Utilization Study: Socio-economic Mapping & Library Urgency Index	\$ 86,000	
Local Planning & Strategic Initiatives Research and Assessment	\$ 10,000	
Synthesis and Alignment of all research	\$ 50,000	
Discovery Report: culmination of insights and findings from research, data analysis, and studies	\$ 15,000	
Deliverable(s): Analyze the data, Draft Analysis Report		
Invoiceable Amount:	\$ 219,000	210 Days
Task 3: Plan Documents (Attachment 1 City's Contract Terms, Appendix A)(i)(C)		
Specific Activities:		
Develop and Deliver the Strategy Planning Document (project overview, current state overview, context, the opportunity, our vision, partnerships & program activation, degrees of intervention and prioritization of portfolio, recommendations by branch)	\$ 63,000	
Develop and Deliver the Strategy Planning Document Appendix (community acknowledgements, business and operations scenarios, community engagement toolkit, strategic framework toolkit, strategic process workshops, assessment methodologies)	\$ 29,000	
Deliverable(s): Analyze the data, Draft Analysis Report		
Invoiceable Amount:	\$ 92,000	365 Days
Task 4: Project Management (Attachment 1 City's Contract Terms, Appendix A)(i)(D)		
Specific Activities:		
Designate a project manager and assistant project manager; develop a project management plan that includes an understanding of the goals and context, deliverables, and milestones; calendar project team meetings; document the process, engagement efforts, and deliverable development	\$ 99,000	
Weekly team meetings	\$ 24,000	
*Please note that our submission for this project does not include Gensler's standard 10% non-consultant markup	\$ -	
Deliverable(s): Weekly Calls, Draft Analysis Report, Leadership Meetings, Managing Milestones, Meeting Deliverables, orchestrating SFPL Feedback		
Invoiceable Amount:	\$ 123,000	365 Days
Task 5: Presentation (Attachment 1 City's Contract Terms, Appendix A)(i)(E)		
Specific Activities:		
Phase II: Initial Findings Presentation	\$ 8,000	
Phase II: Discovery Report Presentation to Leadership	\$ 8,000	
Phase VI: Final Presentations to Board, Leadership, the public, and TBD (up to 4)	\$ 32,000	
*Assumptions: in person presentations include travel and expenses		
Deliverable(s): SFPL Leadership Coordination, SFPL Staff Coordination, Presentation Deliverable Preparation and Deliverable		
Invoiceable Amount:	\$ 48,000	365 Days
PROJECT COST TOTAL		\$ 875,000

Hourly Rates and other direct costs

[Instructions: Paste your hourly rates for all positions associated with services in furtherance of the plan. You may submit the this information on a separate sheet, but you must indicate that you did so in this yellow field]

Gensler 2022:
Principal \$350
Strategy Director \$275-300
Project Manager \$220
Strategist \$175-225
Graphic Designer \$175-200

MSS:
Principal \$275
Senior Designer \$200
Intermediate Designer \$150
Junior Designer \$125
Administrative Support \$75

Harmonic Design 2022-2023:
Principal \$302
Service Design Coach/Consultant \$255
Principal Service Designer \$208
Associate Service Designer \$137
Service Designer \$161
Senior Service Designer \$180

Contigo Communications:
Principal \$275
Racial Equity Consultant \$340
Communications/Outreach Manager \$165
Outreach Specialist \$125

CC&G:
Team Leader \$124.75
Project Manager \$88.25
Chief Analyst \$71.00
Supervisor \$55.35
Recruiter \$55.35
Interviewer - English \$46.50
Interviewer - Bilingual \$61.00
Data Processing Assistant \$54.00

See RFP Section VII Price Proposal

Points	Evaluated Price Proposal
10	Less than or equal to \$875,000
8	Greater than \$875,000 but less than or equal to \$900,000
6	Greater than \$900,000 but less than or equal to \$925,000
4	Greater than \$925,000 but less than or equal to \$950,000
2	Greater than \$950,000 but less than \$1,000,000
0	Greater than or equal to \$1,000,000

IMPORTANT: After verifying accuracy of Project Total Cost, enter this number into PeopleSoft Sourcing Event 0000007236 Line 1. It is your responsibility to ensure that this price is accurate and all inclusive. It is strongly encouraged that you double check your math, especially when adding or removing lines since this may impact the provided excel formula.

Project Total Cost \$ 875,000.00

MQ 1

Contract Terms

Gensler

45 Fremont Street
Suite 1500
San Francisco, CA 94105
(415) 433.3700
gensler.com

We have done a preliminary review of the proposed agreement. While there are a few revisions that Gensler would like to discuss, the agreement provides a very reasonable basis for negotiation, and we have successfully negotiated contract revisions with the City and County of San Francisco in the past. Some of the areas that we wish to discuss further include:

Sec. 4.6- We request the warranty term that is applicable to goods and services be replaced with the following to reflect the industry standard of care that applied to professional architectural and design services: Contractor shall perform the services with the degree of skill and care ordinarily provided by professionals practicing in the same discipline and locality under similar circumstances ("Standard of Care").

Se. 4.7- Liquidated damages are commonly applied to the general contractor who controls the construction schedule and completion of the project, but are not appropriately applied to architects and designers who do not control the construction schedule. Thus we request this section be removed.

Sec. 5.1.1 (e-g)- The technology, cyber, and pollution liability identified are not applicable to the scope of services we would be providing and we request those requirements be removed.

Sec. 5.2- The indemnity obligation is applicable to commercial general liability claims but not in compliance with professional liability insurance. Thus, we request the addition of the following term to clarify our indemnity obligation on professional liability claims: For claims arising from Consultant's performance of its professional service, Consultant shall indemnify City from and against those damages that City incurs to the proportionate extent caused by the negligent act, error, or omission of Consultant or anyone for whom Consultant is legally liable.

Article 9- We request a clarification that ownership of any work product transferred upon payment for services rendered.

Article 10.2 and 1.8- we request any ethical wall obligations be discussed and imposed only if needed based on project specifics.

MQ 2

Proposer Questionnaire
and References

Sourcing Event 0000007236
Attachment 2
Proposer Questionnaire and References

Part I
Proposer Information

Name of Firm:	M. Arthur Gensler Jr. & Associates, Inc.
Headquarter Address:	45 Fremont Street Suite 1500, San Francisco, CA 94105
Phone No.:	(415) 433-3700
Toll Free Phone No.:	N/A
Contact Name & Title:	Michelle Lee and Midori Mizuhara
E-mail:	michelle_lee@gensler.com; midori_mizuhara@gensler.com
SF Supplier ID:	0000016005
Federal Tax ID:	94-1663305
Payment Terms:	Invoice
Person Preparing Bid:	Michelle Lee
Local Representative Name and Number:	Michelle Lee, (415) 836-4194
Warehouse Address:	N/A

Contact Information for Placing Orders:

Telephone:	N/A
Fax:	N/A
Email:	N/A
Website:	https://www.gensler.com/
24-hour Emergency Number:	N/A

Part II
Proposer Questionnaire

Question	Yes	No
1. Do you certify that you have complied and will continue to comply with Section XII (E) of this Solicitation entitled "Limitation on Communications during Solicitation"?	X	
2. Have you registered as a Bidder or Supplier, through the Supplier Portal (https://sfcitypartner.sfgov.org/)? If yes, what is your Bidder ID or Supplier ID? 0000016005	X	
3. Has your company enrolled with Paymode-X to receive electronic payments from the City? https://www.paymode.com/city_countyofsanfrancisco		X
4. Have you registered your business with the San Francisco Treasurer & Tax Collector as required prior to submission of any Proposal? Enter your Business Tax Registration ID here: 94-1663305	X	
5. Are you claiming LBE preference on this solicitation per Chapter 14B?	X	
6. Can you comply with the terms set forth in Attachment 1, City's Proposed Agreement Terms? If you reply NO, you must submit a redline copy of any proposed changes.		X
7. Have you entered a price on the line item in the PeopleSoft Sourcing Event in accordance with the instructions in the Solicitation?	X	
8. Have you submitted with your Proposal all the <u>Required Supporting Documentation</u> outlined in the accompanying solicitation document? If you reply NO to any document, please explain.	X	
9. Have you submitted with your Proposal all the <u>Minimum Qualification Documentation</u> outlined in the accompanying solicitation document? If you reply NO to any document, please explain.	X	
10. Have you submitted with your Attachment 6 <u>Price Proposal</u> Template that complies with the requirements of the accompanying solicitation document? If you reply NO to any document, please explain.	X	
11. Have you submitted with your Attachment 5 <u>Written Proposal Template</u> that complies with the requirements of the accompanying solicitation document? If you reply NO to any document, please explain.	X	

Part III Proposer References

All proposers, including current Contractor, must provide references for at least three (3) organizations of the approximate size and volume comparable to commodities and/or services described in this Solicitation. Upon request, successful proposer(s) may also be required to submit a letter of reference from each reference listed within five (5) days of notification. Failure to do so may result in rejection of proposal.

1. Name of Company	San Francisco International Airport
Address (street, city, state, zip)	710 N McDonnell Rd, San Francisco, CA 94128
Contact Name	Judi Mosqueda, Director of Project Management, Planning, Design and Constructions
Phone No.	(650) 821-0163
Email	judi.mosqueda@flysfo.com
Number of Years Providing Service	20+ years

2. Name of Company	Enoch Pratt Free Library
Address (street, city, state, zip)	400 Cathedral St
Contact Name	Heidi M. Daniel, Chief Executive Officer
Phone No.	(410) 396-5395
Email	hdaniel@prattlibrary.org
Number of Years Providing Service	Less than 1 year

3. Name of Company	Prince George's County Memorial Library System
Address (street, city, state, zip)	9601 Capital Lane, Largo, MD 20774
Contact Name	Roberta Phillips, CEO
Phone No.	(301) 699-3500
Email	roberta.phillips@pgcmls.info
Number of Years Providing Service	1 year

Part IV
Proposer Release of Liability for References

The undersigned hereby fully and forever release, exonerate, discharge and covenant not to sue the City, its commissions and boards, officers and employees, and all individuals, entities and firms providing information, comments, or conclusions ("Reference Information") in response to inquiries that the City may make regarding the qualifications or experience of a Prime proposer, proposed joint venture partner, proposed subconsultant or proposed key/lead team member in connection with the selection process for **SFPL | Strategic Planning (Sourcing Event ID 0000007236)** from and for any and all claims, causes of action, demands, damages, and any and all liabilities of any kind or description, in law, equity, or otherwise arising out of the provision of said Reference Information. This Release and Waiver is freely given and will be applicable whether or not the responses by said individuals, entities or firms are accurate or not, or made willfully or negligently.

M. Arthur Gensler Jr. & Associates, Inc.

Company Name



Signature of Authorized Representative of Company

09/01/2022

Date

Lisa Cholmondeley, Principal


Print Name and Title

Part V.
Proposer Certification of Truth, Accuracy, and Completeness

I certify that based on information and belief formed after reasonable inquiry, the statements and information contained in this document are true, accurate, and complete.

M. Arthur Gensler Jr. & Associates, Inc.

Company Name



Signature of Authorized Representative of Company

09/01/2022

Date

Lisa Cholmondeley, Principal

Print Name and Title

MQ 3

CMD LBE Forms

**FORM 2A: CMD CONTRACT PARTICIPATION FORM**

Section 1: This form must be submitted with the proposal or the proposal may be deemed non-responsive and rejected. Proposer, each Joint Venture partner, Subconsultants, Vendors, and lower sub tiers must be listed on this form. The RFP/RFQ will state which LBE size category (e.g., Micro, Small, and/or SBA-LBE) can be used to meet the LBE sub participation requirement(s). All LBE Proposers/JVs with LBE participation must meet the LBE sub participation requirement(s). Any LBE Proposer/JV with LBE participation may not count its participation towards meeting the LBE sub participation requirement(s). Be sure to check the appropriate box for Rating Bonus under Section 2. If more space is needed for Section 1, attach additional copies of this form.

Contract No.:	SFGOV-0000007236 (Sourcing Event ID)	
Contract Title:	LIB RFP Strategic Planning (Sourcing Event Name)	LBE SUBPARTICIPATION REQUIREMENT(S)
Firm:	M. Arthur Gensler Jr. & Associates, Inc.	<input type="checkbox"/> Micro and Small-LBE Sub Requirement - ____%
Contact Person:	Michelle Lee	<input type="checkbox"/> Micro, Small, SBA-LBE Sub Requirement - ____%
Address:	45 Fremont St, Suite 1500	<input type="checkbox"/> Micro-LBE Sub Requirement - ____%
City/ZIP:	San Francisco, 94105	<input type="checkbox"/> Small-LBE Sub Requirement - ____%
Phone, Email:	(949) 291-2238 michelle_lee@gensler.com	<input type="checkbox"/> SBA-LBE Sub Requirement - ____%

***Type: Identify if Prime (P), JV partner (J), Subconsultant (S), or Vendor (V)**

TYPE *	Firm	Portion of Work (Describe Scope(s) of Work)	% of Work	Indicate LBE or Non-LBE. If LBE, identify MBE, WBE, or OBE; AND Micro, Small, or SBA.	% of LBE Subwork (Carry-Over from % OF Work Column)		
					Micro	Small	SBA
P	M. Arthur Gensler Jr. & Associates, Inc.	project lead; project management; strategy; equity driven urban planning & placemaking	41 %	Non-LBE	%	%	%
S	Contigo Communications	community outreach and engagement	16 %	Micro LBE, MBE, WBE	16 %	%	%
S	Corey, Canapary & Galanis	community and staff quantitative research	19 %	Micro LBE, OBE	19 %	%	%
S	Margaret M Sullivan with Harmonic Design	library staff, leadership, stakeholder partner engagements change management	24 %	Non-LBE	%	%	%
Total % of Work:			100%	Total LBE Sub Participation:	35 %	%	%

I declare, under penalty of perjury under the laws of the State of California, that I am utilizing the above Consultants for the portions of work and amounts as reflected in the proposal for this Contract.

Owner/Authorized Representative (Signature):  Date: 09/01/2022

Print Name and Title: Lisa Cholmondeley, Principal

** MBE = Minority Business Enterprise, WBE = Women Business Enterprise, OBE = Other Business Enterprise.
See CMD website: <http://www.sfgov.org/cmd> for each firm's status



Section 2. Rating Bonus

Check applicable boxes.

- A. ☐ **NO Rating Bonus Requested 0%**
- B. **Contracts with an Estimated Cost in Excess of \$400,000 and Less Than or Equal to \$10,000,000.** See instructions in Sections 2.01 and 2.02.
- ☒ **Micro or Small-LBE 10%**
- ☐ **Joint Venture 7.5%**
- ☐ **Joint Venture 5%**
- ☐ **Joint Venture (Micro or Small-LBEs only) 10%**
- ☐ **SBA-LBE 5%**
- C. **Contracts with an Estimated Cost in Excess of \$10,000 and Less Than or Equal to \$10,000,000.** The below rating bonuses DO NOT apply to Chapter 21 contracts and only apply to Chapter 6 contracts, including Chapter 6.40. See instructions in Section 2.01 for details. This Neighborhood/Zip Code LBE Program shall apply to projects located within the jurisdictional boundary of San Francisco. The program shall not apply to Job Order Contracts (JOC), As-Needed contracts, or other contracts where no specific project location is specified at the time of proposal. The RFP/RFQ will clearly state whether the Pilot Neighborhood/Zip Code LBE Program is applicable to the specific project. A Proposer may receive up to a maximum rating bonus of 13% depending on the particular application.

Prime Neighborhood/Zip Code LBE rating bonus:

- ☐ **Prime Neighborhood LBE (or a JV where the Neighborhood LBE JV partner(s)' participation is at least 40%) 1%**

OR

- ☐ **Prime Zip Code LBE (or a JV where the Prime Zip Code LBE JV partner(s)' participation is at least 40%) 1.5%**

Subconsulting Neighborhood/Zip Code LBE rating bonus:

- ☐ **Sub Neighborhood LBE 0.5%**

OR

- ☐ **Sub Zip Code LBE 1.5%**

- D. **Contracts in Excess of \$10,000,000 and Less Than or Equal to \$20,000,000.** See instructions in Section 2.01.
- ☐ **Micro, Small, or SBA-LBE 2%**
- E. **Mentor-Protégé Program Bid Discount/Rating Bonus.** The Mentor Protégé rating bonus is not applicable to professional services contracts. However, for this CMD Attachment 2, the Mentor Protégé rating bonus/bid discount is applicable for Design-Build and/or CM/GC projects only. See instructions in Section 2.01.
- ☐ **Mentors of the Mentor-Protégé Program 1%**

**Section 3. Proposer, Joint Venture Partners, Subconsultant, and Vendor Information**

Provide information for each firm listed in Section 1 of this form. Firms which have previously worked on City contracts may already have a vendor number. Vendor numbers of LBE firms are located on the CMD LBE website at <http://www.sfgov.org/cmd>. Use additional sheets if necessary.

FIRM NAME:	M. Arthur Gensler Jr. & Associates, Inc.	VENDOR #:	0000016005
ADDRESS:	45 Fremont Street, Suite 1500	FEDERAL ID #:	94-1663305
CITY, ST, ZIP:	San Francisco, CA 94105	PHONE:	415-433-3700
SERVICE:		EMAIL:	michelle_lee@gensler.com

FIRM NAME:	Contigo Communications	VENDOR #:	0000038716
ADDRESS:	2176 Palou Avenue	FEDERAL ID #:	82-385-3184
CITY, ST, ZIP:	San Francisco, CA 94124	PHONE:	415-810-8717
SERVICE:	Community/Stakeholder Engagement; Communications	EMAIL:	susana@contigo-partners.com

FIRM NAME:	Corey, Canapary & Galanis	VENDOR #:	51234
ADDRESS:	447 Sutter St, Penthouse North	FEDERAL ID #:	94-1691866
CITY, ST, ZIP:	SF, CA 94108	PHONE:	415-397-1200
SERVICE:	Market Research	EMAIL:	jon@ccgresearch.com/ carolc@ccgresearch.com

FIRM NAME:	Margaret Sullivan Studio	VENDOR #:	1089573 (renewal in process)
ADDRESS:	307 7th Avenue	FEDERAL ID #:	46-5315235
CITY, ST, ZIP:	NY 10001	PHONE:	(646) 687-7923
SERVICE:	Strategy and Design	EMAIL:	margaret@margaretsullivanllc.com

FIRM NAME:	Harmonic Design	VENDOR #:	
ADDRESS:	50 Hurt Plaza SE #930	FEDERAL ID #:	83-0642737
CITY, ST, ZIP:	Atlanta, GA 30303	PHONE:	(678) 825-4603
SERVICE:	Strategy and Design	EMAIL:	pq@thisisharmonic.com

FIRM NAME:		VENDOR #:	
ADDRESS:		FEDERAL ID #:	
CITY, ST, ZIP:		PHONE:	
SERVICE:		EMAIL:	



FORM 2B: "GOOD FAITH EFFORTS" REQUIREMENTS FORM

This "Good Faith Efforts" form, along with the required supporting documentation, must be completed and submitted per the instructions in this form, EVEN IF the LBE subcontracting/subconsulting participation requirement has been met (Section 14B.8 of the San Francisco Administrative Code). At the time of bid/proposal, Bidders/Proposers must submit this form along with its Bid/Proposal to be responsive. Failure to fulfill at least one of the three different approaches below may deem the Bid/Proposal nonresponsive.

To assist Bidders/Proposers with outreach to LBEs, the CMD website has a directory of certified LBEs: <https://sfgov.org/cmd/>.

Choose one of the three approaches listed below on this form. Approaches B and C require submittal of supporting documentation.

☒ Approach A - 35% Approach

This approach is codified in Section 14B.8 of the San Francisco Administrative Code.

Under Approach A, a Bidder/Proposer must demonstrate that the total LBE participation requirement established for this project will be exceeded by at least 35%. This approach is illustrated in this CMD Attachment under Part IV.

- If a Contract has *separate* LBE sub participation requirements, the Bidder/Proposer must exceed by at least 35% the total sum of all the LBE sub participation requirements.
- A Small or Micro-LBE Prime Bidder/Proposer may not count its own contract work toward the LBE sub participation requirement portion, but may count its own contract work for the portion that exceeds the LBE sub participation requirement (i.e., 35% good faith outreach exception portion).
- An SBA-LBE Prime Bidder/Proposer may not count its own contract work towards the LBE sub participation requirement portion or the 35% good faith outreach exception portion.
- An SBA-LBE sub may count its participation towards the 35% good faith outreach exception portion if the Contract Monitoring Division Director permitted Bidders/Proposers to list SBA-LBE firms to satisfy the LBE sub participation requirement.

Select the boxes that apply:

Does your Bid/Proposal demonstrate that you have exceeded the established LBE sub participation requirement(s) by 35% or more in accordance with Section 14B.8(B)? ☒ YES ☐ NO

- ☐ I am a Small or Micro-LBE Prime Bidder/Proposer. I have listed LBE subs on Section 00 43 36/Form 2A/equivalent form to meet the established LBE sub participation requirement(s). I am relying on self-performed contract work to meet the 35% good faith outreach approach. Below is the total value of contract work I will perform with my own forces:

Percent (%) or Amount (\$) of Work: _____

- ☒ I am NOT a Small or Micro-LBE Bidder/Proposer. I have demonstrated on Section 00 43 36/Form 2A/equivalent form that the proposed LBE sub participation exceeds the sum of the established LBE sub participation requirements by at least 35%.

☐ Approach B - Inclusion of Micro-LBE



This approach establishes that the Prime is utilizing Micro-LBEs on their projects.

Under Approach B, the Bidder's/Proposer's good faith efforts must be demonstrated by listing a different Micro-LBE subcontractor/subconsultant on this Bid or Proposal than they have listed in the last five (5) most recently awarded CCSF Contracts with LBE sub participation requirements.

- A Prime Bidder/Proposer that has been awarded at least five (5) CCSF Contracts at the time of the current Bid/Proposal must list at least one (1) Micro-LBE firm on its team that the Prime Bidder/Proposer has not listed on its last five (5) most recently awarded CCSF Contracts.
- A Prime Bidder/Proposer that has been awarded four (4) or less CCSF Contracts at the time of the current Bid/Proposal must list at least one (1) Micro-LBE firm on its team that the Prime Bidder/Proposer has not listed on any of its previously awarded CCSF Contracts and must indicate below the number of CCSF Contracts that it has been previously awarded.

Enter exact number of CCSF awarded Contracts: _____

- If there are separate LBE sub participation requirements on this Bid/Proposal, the Prime Bidder/Proposer is only required to list at least one Micro-LBE on its team to meet the "Good Faith Efforts" requirement.
- A Prime Bidder/Proposer that has never listed a Micro-LBE sub on any of its CCSF awarded Contracts or that has never bid on a CCSF Contract, may also utilize this approach.

A Bidder/Proposer must list the last five (5) most recently awarded CCSF Contracts below. If a Bidder/Proposer has four (4) or less CCSF awarded Contracts, it must list below all of its CCSF awarded Contracts. This includes Contracts where the Bidder/Proposer received a notification of award, even if work has not begun or if the Contract is not yet complete.

- CCSF Contracts that do not have an LBE sub participation requirement are excluded from this approach.
- Contracts where a Micro-LBE was utilized for a substitution, firm addition, or a trade package for CM/GC or DB projects are excluded from this approach.

Contract Awarding Department	Contract Title	Contract Number	Contract Awarding Department's Award Date
1.			
2.			
3.			
4.			
5.			

Bidder/Proposer must submit the following supporting documents for verification purposes; failure to submit this documentation may result in the Bid/Proposal found non-responsive:



- For each of the Contracts listed above, the Prime Bidder/Proposer must include Section 00 43 36/CMD Form 2A/equivalent form submitted to the Contract Awarding Department.
- The Section 00 43 36, CMD Form 2A, or equivalent form must indicate the Contract Awarding Department, the Project Title and the Contract Number.

The Micro-LBE sub listed for Approach B must sign below. By signing below, the Micro-LBE is verifying that it has not been utilized on the Prime Bidder's/Proposal's projects provided above.

Contract Number and Name: _____

Signature of Micro-LBE Owner/Authorized Representative: _____

Micro-LBE Owner/Authorized Representative (Print): _____

Name of Firm (Print): _____

Title and Position: _____

Address, City, ZIP: _____

Telephone/E-mail: _____

Date: _____

☐ Approach C - Good Faith Negotiation(s)

This approach awards points for negotiating with LBEs in good faith.

Under Approach C, the Bidder's/Proposer's good faith outreach will be evaluated based on the entire team listed for the contract, even if the contract includes separate LBE sub participation requirement(s).

- A Bidder/Proposer must achieve at least 50 points with any combination of Items #1 through #3 below, as determined by CMD, to be deemed compliant with the "good faith outreach" requirements. A Bidder/Proposer who fails to achieve at least 50 points will be declared nonresponsive, and the Bid/Proposal will be rejected. Please check "yes" or "no" for each item listed below. Supporting documentation for Items #1 through #3 below must be submitted with the Bid/Proposal.



<p>1. Did your firm contact CMD certified LBE firms, not less than 10 calendar days prior to the due date of the Bid/Proposal? If so, you must include email documentation showing the date of the contact with your Bid/Proposal to verify that contacts were made timely.</p> <p>The purpose of contacting LBE firms is to provide notice of interest in bidding/proposing for this project. When contacting LBEs, you should provide adequate information about the plans, specifications, and requirements for the work.</p> <p>A Bidder/Proposer will receive 1 point for each LBE firm contacted, not less than 10 calendar days prior to the due date of the Bids/Proposals. The Bidder/Proposer may receive up to a maximum of 10 points for this item. There is no limitation to how many LBE firms a Bidder/Proposer can contact. Where there are fewer than 10 LBE firms available for subcontracting, and CMD has confirmed as such prior to the bid/proposal due date, the bidder/proposer will receive the 10 points as long as all potential LBE firms are contacted.</p> <p>If the City gave public notice of the project less than 15 calendar days prior to the Bid/Proposal due date, the allocation of points above still applies, except that the Bidder/Proposer may contact those LBE firms identified less than 10 calendar days prior to the due date of the Bid/Proposal.</p>	<input type="checkbox"/> Yes (Maximum of 10 points)	<input type="checkbox"/> No (0 points)
<p>2. Did your firm follow-up/negotiate in good faith with interested LBEs*? Your follow-up contact(s) with interested LBEs should include, but are not limited to correspondence regarding: the scope of work/services, quotes/billing rates, qualifications and/or expectations; the City's bonding and financial assistance program(s); assistance available to potential LBE subcontractors/subconsultants to properly mobilize; reduction of your firm's pre-qualification standards; etc.</p> <p>The Bidder/Proposer shall submit the following documentation:</p> <ul style="list-style-type: none"> a) Identify each interested LBE firm you are submitting email correspondence/documentation for; b) Copies of <u>ALL</u> email correspondence for each LBE identified for Item #2 (Note that the initial email correspondence from Items #1 above will not count towards the subject Item)—At a minimum, the Bidder/Proposer must include email documentation showing a response to the interested LBE; c) A full and complete statement of the reason(s) why any of the LBE firms identified for Item #2 was not selected for the subject project. <p>For each interested LBE firm that the Bidder/Proposer does follow-up with, the Bidder/Proposer will receive 10 points. There is no maximum amount of points/limitation to how many LBE firms a Bidder/Proposer can correspond with and follow-up/negotiate in good faith.</p> <p>A Bidder/Proposer who does not perform any follow-up contact with interested LBEs will receive zero points for Item #2.</p> <p>* "Interested LBE" shall mean an LBE firm that expresses interest in being a subcontractor/subconsultant/supplier to the Bidder/Proposer for the subject solicitation.</p>	<input type="checkbox"/> Yes (Minimum of 10 points to no Maximum)	<input type="checkbox"/> No (0 points)



<p>3. As part of your Bid/Proposal, did your firm list an LBE identified from Item #2 above?</p> <p>For each LBE that is identified under Item #2 above, the Bidder/Proposer will receive 30 points for listing said LBE for the subject solicitation on the specified sub listing form such as Section 00 43 36/CMD Form 2A/equivalent form.</p> <p>A Bidder/Proposer who does not list any LBEs from Item #2 above for the subject solicitation on Section 00 43 36/CMD Form 2A/equivalent form, will receive zero points for Item #3.</p> <p>The Bidder/Proposer shall submit the following documentation:</p> <ul style="list-style-type: none"> a) Copies of all email correspondence between your firm and the LBE listed for the project, including written bids/quotes; b) A full and complete statement of the reasons for selection of the subcontractor(s)/subconsultant(s)/supplier(s). If the reasons are based on relative qualifications, the statement must address the particular qualification at issue. If the reason is based on the bid/quote amounts, the statement must include the amounts and describe the similarities and/or dissimilarities in the scope of work covered by the bids/quotes. c) Email notification to LBE that it will be listed on Section 00 43 36/CMD Form 2A/equivalent form and include the listed LBE's scope of work and dollar value/percentage. <p>Pursuant to Section 14B.8(E) of the Ordinance, all Bidders/Proposers shall maintain the documentation described under this item for three years following submission of the Bid or completion of the Contract, whichever is later.</p>	<p><input type="checkbox"/> Yes (Minimum of 30 points to no maximum)</p>	<p><input type="checkbox"/> No (0 points)</p>
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For Approaches A through C, the Prime Bidder/Proposer declares and swears under penalty of perjury under the laws of the State of California that the foregoing statements/documentation are true and correct and accurately reflect its good faith efforts as required in this CMD Attachment, in Section 14B.8 and the accompanying Chapter 14B's Rules and Regulations.

Owner/Authorized Representative (Signature)

Owner/Authorized Representative (Signature)

Lisa Cholmondeley, Principal

Name (Print) and Title

Name (Print) and Title

M. Arthur Gensler Jr. & Associates, Inc.

Firm Name

Firm Name

(415) 836-4617

Telephone

lisa_cholmondeley@gensler.com

Email

Telephone

Email



FORM 3: CMD COMPLIANCE AFFIDAVIT

1. I will ensure that my firm complies fully with the provisions of Chapter 14B of the San Francisco Administrative Code and its implementing Rules and Regulations and attest to the truth and accuracy of all information provided regarding such compliance.
2. Upon request, I will provide the CMD with copies of Contracts, subcontract agreements, certified payroll records and other documents requested so the HRC and CMD (as applicable) may investigate claims of discrimination or non-compliance with either Chapter 12B or Chapter 14B.
3. I acknowledge and agree that any monetary penalty assessed against my firm by the Director of the Contract Monitoring Division shall be payable to the City and County of San Francisco upon demand. I further acknowledge and agree that any monetary penalty assessed may be withheld from any monies due to my firm on any Contract with the City and County of San Francisco.
4. I declare and swear under penalty of perjury under the laws of the State of California that the foregoing statements are true and correct and accurately reflect my intentions.

Signature of Owner/Authorized Representative: _____

A handwritten signature in black ink, appearing to read "Lisa Cholmondeley", written over a horizontal line.

Owner/Authorized Representative (Print) _____
Lisa Cholmondeley

Name of Firm (Print) _____
M. Arthur Gensler Jr. & Associates, Inc.

Title and Position _____
Principal

Address, City, ZIP _____
45 Fremont Street, Suite 1500 San Francisco, CA 94105

Federal Employer Identification Number (FEIN): _____
94-1663305

Email _____
lisa_cholmondeley@gensler.com

Date: _____
09/01/2022



FORM 5: CMD EMPLOYMENT FORM


This form is to be submitted with the proposal.

Indicate key personnel designated to work on this project for the entire project team (Proposer, Joint Venture partners, subconsultants, and vendors).

The employees listed should include all those listed in other sections of the proposal.

NAME OF FIRM	NAME OF EMPLOYEE	PROJECT ROLE	RACE	SEX
Corey, Canapary & Galanis	Jon Canapary	Research Expert	White	Male
Corey, Canapary & Galanis	Carol Anne Carroll	Research Director	White	Female
Margaret Sullivan Studio	Margaret M Sullivan	Library Design Expert	White	Female
Margaret Sullivan Studio	Chad Thomas	Design Strategist	Black	Male
Margaret Sullivan Studio	Shuyu Fang	Social Impact Designer	Asian	Female
Contigo Communications	Susana Razo	Principal/Stakeholder Engagement	White - Hispanic	Female
Reynolds Consulting	Milton Reynolds	Equity Consultant/Facilitator	Black	Male
Harmonic Design	Patrick Quattlebaum	Service Design Expert	White	Male
M. Arthur Gensler Jr. & Associates, Inc.	Lisa Cholmondeley	Principal-in-Charge	Black	Female
M. Arthur Gensler Jr. & Associates, Inc.	Michelle Lee	Lead Strategist	Asian	Female
M. Arthur Gensler Jr. & Associates, Inc.	Midori Mizuhara	Project Manager	Asian / White	Female
M. Arthur Gensler Jr. & Associates, Inc.	Elaine Asal	Strategic Advisor	Middle Eastern	Female

Sign below including each Joint Venture partner.


 Owner/Authorized Representative (Signature)
 Lisa Cholmondeley, Principal
 Name (Print) Title
 M. Arthur Gensler Jr. & Associates, Inc.
 Firm Name
 (415) 836-4617 lisa_cholmondeley@gensler.com
 Telephone Email
 09/01/2022
 Date

Owner/Authorized Representative (Signature)
 Name (Print) Title
 Firm Name
 Telephone Email
 Date

Appendix

MQ 5: Written
Proposal Template

Question 1 Business Profile (5 Points): Provide a brief description of the Proposer’s size and organization structure, and include a listing and description of any lawsuit resulting from (a) any project undertaken by the Proposer or by its subcontractors where litigation is still pending or has occurred within the last five years or (b) any type of project where claims or settlements were paid by the Proposer or its insurers within the last five years. If none, note that neither the Proposer nor any of its subcontractors have any such projects. Proposers should attest in their Business Profile whether or not the Project Team has availability to commence work as of the contract start date, anticipated in January 2023.

Proposer Response

Our Project Team attests to being able to start January 2023. The following organizations will collaborate to form the Project Team, each bringing significant expertise and experience that collectively will achieve the best outcomes to fulfill the project objectives:

Gensler – project lead, project management, strategic design, analytics, equity-driven urban planning and placemaking

Margaret Sullivan Studio LLC (MSS) – library expertise

Corey, Canapary & Galanis (CC&G) (Micro LBE) – community research and staff engagement research, quantitative and qualitative expertise

Contigo Communications (Micro LBE) – community outreach and engagement and equity, diversity and inclusion

Harmonic Design, Inc. – change management service design, staff co-creation, and readiness for change

Gensler

Founded and headquartered in San Francisco in 1965, Gensler has successfully developed our practice and services to deliver projects around the world. With over 6,700 employees in 52 offices worldwide, we collaborate with corporate, government, institutional, and not-for-profit clients to achieve measurable business and organizational results through strategic planning and design. Our “one-firm firm” approach focuses on design’s impact on human experience across the globe. Our core services include consulting and real estate services, sustainability, urban strategies, architecture, interior design, brand design, and digital experience design.

Our cross-disciplinary expertise helps connect the pieces. Our teams include a panoramic range of talent: strategists, economists, technologists, planners, experience designers, analysts, researchers, as well as architects and interior designers, and more — all working together to create thoughtful and compelling experiences. The Gensler team for this effort will have project management, strategists, urban planners, and analysts as part of the team.

We are recognized for our project leadership and consistency. Gensler is the only firm in the nation to be named by its peers for 20 consecutive years as the firm most respected for the consistent quality of its strategic design work. Since the category was first initiated, we have been the only firm named the best-managed design firm in the nation. The company has successfully delivered strategic planning services to a list of client organizations, including the City and County of San Francisco, Santa Clara County, Prince George’s County Langley Park Library, and Enoch Pratt Free Library.

Gensler has performed literally tens of thousands of jobs throughout the United States and abroad, and we are very proud of our record and ability to resolve disputes quickly and amicably. Over the past five years, Gensler has been involved in a few cases as a defendant. None of these cases has had a material impact on Gensler’s financial standing, and current pending litigation is being covered by insurance and will not have a material impact on Gensler’s financial standing. The particulars of these cases are confidential.

Question 1 Business Profile Continued

Proposer Response

Margaret Sullivan Studio

Margaret Sullivan Studio is a mission-driven firm dedicated to advancing the impact of public libraries through community-driven, human-centered strategic planning, facilities design, community co-creation, staff engagement, and partner impact. Since the firm's founding in 2014, the Studio has become the industry leader in re-envisioning the 21st century library for diverse and complex contemporary communities.

The Studio is nationally recognized as a thought leader in the industry, connecting innovators, futurists, and relevant ideas to librarians and community leaders. Specifically, in the past eight years, MSS has revolutionized the industry by introducing equity-driven community economic development techniques to achieve strategic and master facilities goals. As a result, MSS has been a catalyst for over 40 library systems to confidently activate four million square feet of public library experiences through strategic planning and facilities design, fostering conditions for diverse communities to flourish nationwide.

The Studio is based in New York City with a team of fourteen multidisciplinary designers. MSS singularly employs women, people of color, and LGBTQ+ to align with clients goals to represent the voices and perspectives of those often under-represented in civic work. The Margaret Sullivan Studio team will include Margaret Sullivan, supported by her Director of Strategic Design, Chad Thomas, as well as design strategists, architects, and interior designers.

MSS does not have any projects where (a) litigation is still pending or has occurred within the last five years or (b) any type of project where claims or settlements were paid by the Proposer or its insurers within the last five years

Contigo Communications

Contigo was founded in January of 2018, and is a certified micro-LBE, micro SBE, WMBE and DBE certified firm located in San Francisco. Susana Razo and Milton Reynolds are community engagement and racial equity experts. Owner and Principal Susana Razo was born and raised in San Francisco and continues to reside in the City. She brings over 15 years of consulting expertise, and works with a multidisciplinary team of 5 consultant professionals and 2 administrative supports.

The team prides itself for its ability to co-construct with clients engagement approaches that help to elevate the voices and needs of community members that have historically been left out of program and policy planning processes. These approaches help to pave the way for long-term systemic changes in community engagement for our clients.

Contigo does not have any projects where litigation is still pending or has occurred within the last five years or any type of project where claims or settlements were paid by the Proposer or its insurers within the last five years.

Question 1 Business Profile Continued

Proposer Response

Harmonic Design, Inc.

Founded in 2018, Harmonic Design uses service design to inspire more human, cooperative, and sustainable services for society. We are headquartered in Atlanta, GA, and are the largest independent service design firm in the United States with a team of more than 20 service designers located from east to west coast.

Harmonic clients include for-profit, not-for-profit, and government organizations seeking to align strategy and service offerings with the needs of people. Our co-design process brings employees deep into understanding the needs and behaviors of all service actors, envisioning possible futures, and identifying how service delivery, operations, and competencies should evolve to achieve strategic outcomes.

Libraries have partnered with our founder, Patrick Quattlebaum, and the Harmonic team to rethink strategies, reimagine service models, and expand their service design capacity to support their mission. Clients include: Salt Lake Public Library, Forth Worth Public Library, Richland Public Library (Columbia, SC), District of Columbia Public Library, Las Vegas Public Library, and several other urban library systems. Through consulting, training, and coaching, library leaders have transformed their customer experiences and equipped their staff to be more creative, collaborative, and outcome oriented.

Corey, Canapary & Galanis

Corey, Canapary & Galanis (CC&G) (Micro LBE) is a San Francisco based research firm incorporated in 1969. CC&G has a staff of 10. All research implementation is conducted by in-house staff. The firm is certified as a San Francisco Micro LBE, a California SBA, and a certified member of the California Green Business Network.

No lawsuits or litigation resulting from any project where litigation is still pending or has occurred within the last five years or any type of project where claims or settlements were paid by the Proposer or its insurers within the last five years.

Question 2: Team Members Narrative (5 Points): Provide the role, responsibilities, qualifications, and company affiliation of every individual on the Proposer team who will perform the services outlined in this Solicitation. Discuss each team member’s background and experience in order to demonstrate a strong ability to successfully perform the work.

Proposer Response

Our team will bring a wealth of complementary and specialized experience and skills to developing the strategic plan, in addition to training, and outreach services, in collaboration with SFPL leadership, staff, and stakeholders, that will drive the transformation required to achieve SFPLs strategic goals.

The Project Team is composed of:

Gensler — Midori Mizuhara and Michelle Lee will be primary Points of Contact supporting project management and team coordination/ engagement. Lisa Cholmondeley, is a principal in the San Francisco office and will serve as principal oversight. Elaine Asal will be a strategic advisor to the project supporting with her strong experience in equity-driven development, civic engagement and urban planning efforts. The Gensler team also includes an analyst, urban planner, and support strategists.

MSS and Harmonic Design — Margaret Sullivan and Patrick Quattlebaum as project library experts, supported primarily by Chad Thomas, Director of Strategic Design, Shuyu Fang, Social Impact Designer, and Annika Northland, Urban Placemaker

CC&G — Jon Canapary and Carol Anne Carroll as quantitative and qualitative research experts

Contigo Communications — Susana Razo and Milton Reynolds as community engagement outreach expert

As Project Co-Leads, Elaine (Strategic Advisor), Michelle (Lead Strategist), and Midori (Project Manager) will guide the team to strategically approach the overall project including audits and assessments, outreach engagement, and qualitative and quantitative data analyses to generate strategies for the SFPL to enhance neighborhood social infrastructure through its library system with an eye towards equity, inclusivity, and climate resilience. They, along with the Project Team, will develop the strategic plan documents to meet the City’s requirements. Midori and Michelle will be the primary points of contact for the team. Gensler excels at complex and challenging projects, specifically efforts that combine a wide range of stakeholders, quantitative and qualitative analysis, as well as high targets for positive impact. Our project co-leads are well versed in these types of engagements and lead the firm in equitable engagement and planning efforts. Midori has a long history in California, working with community organizations and public engagement around equity driven planning efforts. Her background in architecture, urban planning, program development and community engagement equips her to think systematically about our built environment . She is highly organized, and a strong team leader with excellent communication skills. Michelle is based in San Francisco and has deep experience in the design and facilitation of inclusive workshops and strategy expertise leading a wide range of project types and engagements. Elaine, has a long history supporting complex equitable development projects and leading long range strategic efforts for non-profits, corporations, developers, and public sector clients. Her most recent collaboration with Margaret Sullivan Studios has demonstrated a highly effective partnership to deliver a thoughtful, and comprehensive strategic plan for the Enoch Pratt Free Library System in Baltimore. In addition, the Gensler team has a deep bench of strategists, analysts, and planners to support the project as may be needed over the course of the engagement.

Question 2: Team Members Narrative Continued

Proposer Response

Margaret, Project Library Expert, will lead SFPL staff and leadership participation, the mission and values audit and development, demographic and trends analysis, and bring industry best practices to the process. She has collaborated with over forty public library systems, helping them to re-envision the 21st century library for diverse and complex contemporary communities, with a focus on America's urban cities. Her work can be seen in public library systems from New York to Chicago, from the District of Columbia to Los Angeles.

Patrick, Project Library Expert, will work with SFPL leadership, staff, and the consultant team to foster a co-creative process that will create momentum for understanding, creativity, and change. His approaches will help the greater team synthesize the community's stories, needs, challenges, and ambitions to envision new or reimagined services, journeys, and experiences. He brings a human-centered service design mindset and shares methods for sustained organizational transformation to each project, including his work with public library systems in the District of Columbia, Salt Lake City, and Las Vegas-Clark County.

Jon Canapary, Project Research Lead, will design and execute a robust research effort that will be implemented as part of this project. Carol Anne Carroll, Research Director, will lead sampling, scheduling and quality checks for the project's research components. The research approach will include statistically reliable data collected from both internal and external stakeholders. Jon and Carol are uniquely qualified to lead this effort for the SFPL having served as Project Leads for both the City Survey on which the SFPL scored an A- rating and on the SFPL Open Hours study which was last completed in 2018. As key leaders of a local micro-LBE firm, Jon and Carol have also lead numerous research efforts in which data was used in strategic planning. This includes work for the SF Municipal Transportation Agency, SF International Airport, the SF Public Utilities Commission, SF Paratransit and others. The research design for the 2022 SFPL strategic plan project will be led by seasoned leaders who have expansive local knowledge. This will ensure the research conducted will be inclusive and representative of the City as a whole.

Susana Contigo Razo, Community Outreach Lead, will raise awareness about the SFPL equity goals and project purpose; provide consistent/easy-to-understand communications regarding the SFPL's strategic planning process; collaborate with the staff, partner organizations and community to develop a shared vision and action plans for establishing and/or improving the SFPL's equity metrics; engage with, and solicit input from, policymakers, the general public, and stakeholder groups as part of the strategic process, and in particular develop methods to obtain meaningful input from an array of stakeholders and possibly hard-to-reach-population segments. Susana specializes in strategic communications, outreach and meaningful engagement of diverse hard-to-reach communities and stakeholders. Contigo, means "with you" in Spanish, and it is the firm's belief that engagement begins and ends with deep listening. Contigo has extensive experience planning and facilitating productive engagement of diverse stakeholders on challenging projects. Projects have ranged broadly and include, school relocations, school resource planning, equity program planning and implementation, real estate mixed-use development projects, infrastructure and public space planning and strategic planning. This range of experience, accompanied by a proven track record, makes Contigo a nimble and capable partner in effective internal and external community engagement.

Question 2: Team Members Narrative Continued

Proposer Response

Strategic Planning Task Chart

Collectively we have done over 22 projects of similar ambition. For quick reference, please see the chart on page 12.

We are an unparalleled team of leading national thought leaders and practitioners who are re-envisioning the library for the 21st century, pioneering equity and inclusion strategies for organizations, and engaging and activating communities in San Francisco and across the nation. We have extensive experience working on projects of similar complexity to San Francisco Public Library's project that address strategic visioning, stakeholder trust building and outreach, quantitative and qualitative data capture and analysis, and sustainability for impactful results within a context of rapidly changing circumstances and unknowable futures.

Motivated by our aligned values, we will drive a visionary yet actionable strategic planning process in partnership with SFPL that can be readily used to inform service-driven, equity-minded programming and capital investments.

Building Strategy Through an Implementation Perspective

When we design a plan, it is much more than a material product that is delivered — it provides a direction and capability for an organization to grow. For SFPL, the strategic planning process will become a preliminary journey and experiential learning tool enabling the Library to confidently rethink strategies, reimagine service models, and grow service design capacity in support of sustained transformation. Additionally, since we are planners and designers, as well as implementers, we bring a rare perspective to the strategic planning process that is informed by current, real world knowledge and that allows us to always hold implementation in mind as the final outcome.

Leveraging Strengths through Experienced Project Management to Foster a Culture of Collaboration

Strategic and innovative work is a team sport. We value co-creating and partnership. Our methodology is participatory and interactive. Strong project management is about communication, leveraging the talents of the team, and supporting every team member to ensure the process runs at the agreed upon pace. In strategic work, this requires sophisticated project management expertise. SFPL will benefit from the experience and breadth of Gensler, the expert experience MSS and Harmonic Design has had at creating new methodologies that require real time re-direction, the deep community trust of Contigo Communications, and the market analytics expertise of CC&G. Clear communication protocols will be established early on in the project in collaboration with SPFL, supported by consistent check-ins and tracking of tasks and engagements.

Designing Strategies and Service Design Experiences for Urban Libraries

Our team is passionately driven by our desire to create change for social justice, inclusivity, and the environment. MSS is dedicated almost exclusively to advancing the role of the American Public Library as a vehicle for inclusivity and community transformation—the only firm distinguished as such in the country. MSS has become the industry leader in re-envisioning the 21st century library for diverse and complex contemporary communities, with a focus on America's urban cities. The Studio has collaborated with over forty public library systems, along with the following urban library systems, to provide strategic planning, facilities master planning, visioning, programming, curriculum development, architectural design, and staff professional development: New York Public Library, DC Public Library, Chicago Public Library, Cleveland Public Library, Charlotte-Mecklenburg Public Library, Fort Worth Public Library,

Question 2: Team Members Narrative Continued

Proposer Response

Las Vegas-Clark County Public Library, Los Angeles Public Library, Prince George's County Memorial Library System, Richland (SC) Library, Salt Lake City Public Library, and Salt Lake County Public Library.

Our team is joined by Patrick Quattlebaum, Harmonic Design, a firm specializing in human-centered service design and a long-time collaborator with MSS, such as with Richland Library's Executive Director, Melanie Huggins to develop the innovative "Library as Studio" model, which provides a variety of creative spaces to strengthen community connections and catalyze a creative economy. Patrick and his team have also trained staff at many libraries and at the state level in service design, building capacity to reimagine service models, services, and customer and staff experiences.

The 21st Century Library in 2022

The 21st century public library repositions itself from a well-intentioned passive entity into an active, intentional, and synergistic force providing meaningful community impact. Today, libraries are expected to offer a spectrum of services and functions for a variety of users influenced by myriad conditions — all for the diverse communities they serve. Major urban libraries such as SFPL have enormous responsibilities to fulfill, yet today especially, there is also an incredible opportunity for libraries to positively influence communities and foster economic development.

Yet to be truly transformational institutions, the public library must adopt new approaches that radically depart from the standards, benchmarks, metrics, and trends of the past. SFPL is already embracing the 21st century library paradigm across its 27 branches. The BLIP campaign has successfully revitalized the majority of its branches, all while receiving consistently excellent ratings from its users.

The Urban Impact Model

MSS stands out as an industry leader that activates the 21st century library to achieve significant social outcomes by generating connections, building coalitions and revitalizing economies.

The Studio's revolutionary mission-driven industry projects include:

- ImaginOn, the Joe and Joan Martin Center, "the first library of the 21st century"
- DreamYard Arts Center in the South Bronx, YOUMedia/Connected Learning prototype, with Chicago Public Library
- Library as Studio, an innovative methodology for human-centered 21st century facilities design, with Richland Library and Harmonic Design
- Here-to-Here—aka Grit Lab—a collective impact youth career pathways non-profit forging financial sustainability and economic impact for The South Bronx
- Salt Lake City Public Library's groundbreaking Strategic Roadmap, with Harmonic Design

These mission-driven models produce meaningful outcomes by using programming and place to foster community connections and coalition building. They weave together a social infrastructure of partnerships that enables them to forge collective action and collaborative advocacy that soon become deeply embedded in their communities, enriching them and in some cases sustaining them. Our outcome-focused process has proven to leverage community leaders, organizations and assets for a collaborative impact model that, if successful, takes on a life of its own.

Question 2: Team Members Narrative Continued

Proposer Response

In 2020, at the height of the pandemic, funding was cut for Youth Empowerment Summer (YES), New York City's Summer Youth Employment Program and the largest youth employment program in the US. This triggered a rapid response ecosystem of advocates, educators, community leaders, and youth activists who mobilized to leverage a wide array of collective action interventions. Here-to-Here, designed by MSS, was one of those players.

YES's work to restore funds for the City's youth employment program employed collaborative advocacy - from SYEP providers, informal community learning organizations, and teen activists. As an effective model that engendered meaningful connections, Here-to-Here, revealed how such networks can make movements happen.

Urban Planning from an Equity Lens

We understand the importance of both quantitative data, and qualitative engagement in creating an informed, and tangible outcome rooted in equity and inclusion. We apply an equity lens to our studies and planning approach - giving SFPL the tools and context it needs for clear and intentional decision making. The Library Urgency Index mapping methodology helps to illustrate need, relative to other planning parameters such as branch walksheds, areas of investment, political districts, schools or recreational centers. Layering this information together provides useful context in one clear visual. Connecting the physical mapping to a quantitative understanding of economic development factors, community health needs, arts and culture further allows us to explore gaps, challenges and opportunities for the libraries to provide meaningful support and engagement.

Engaging Community through the Lens of Justice, Equity, Diversity, and Inclusion

We also know that equity goes beyond physical planning. An inclusive process will be necessary to an inclusive outcome. The how of our inclusive process is a vital part of building capacity, support, and fundamentally building a community-centered solution that engages and builds its audience along the way. A good strategic plan doesn't stop at the physical assets, it understands the programming, activation, and community curation necessary for it to thrive. We will collaborate with SFPL staff, partner organizations and the community to advance its equity metrics,

Connecting, Engaging and Communicating with SFPL's Stakeholders

Our approach to the strategic process ensures that SFPL's plan will be guided by the voices of all of San Francisco's diverse communities and residents. The Contigo Team knows and appreciates the varied richness of San Francisco and its micro-communities. Also, key team members, from Gensler and Harmonic Design have considerable outreach experience and alignment with the City's people and neighborhoods.

Qualitative and Quantitative Data Gathering and Analysis

Gensler, MSS, and CC&G will all contribute their considerable resources and capabilities for the qualitative and quantitative data analysis required for SFPL's Plan. Gensler will also provide additional capacity to the team's data collection and analysis resources via its in-house data analytics team. MSS will deliver benchmarking studies, in addition to case studies of public libraries that have embraced similar bold visions.

Question 2: Team Members Narrative Continued

Proposer Response

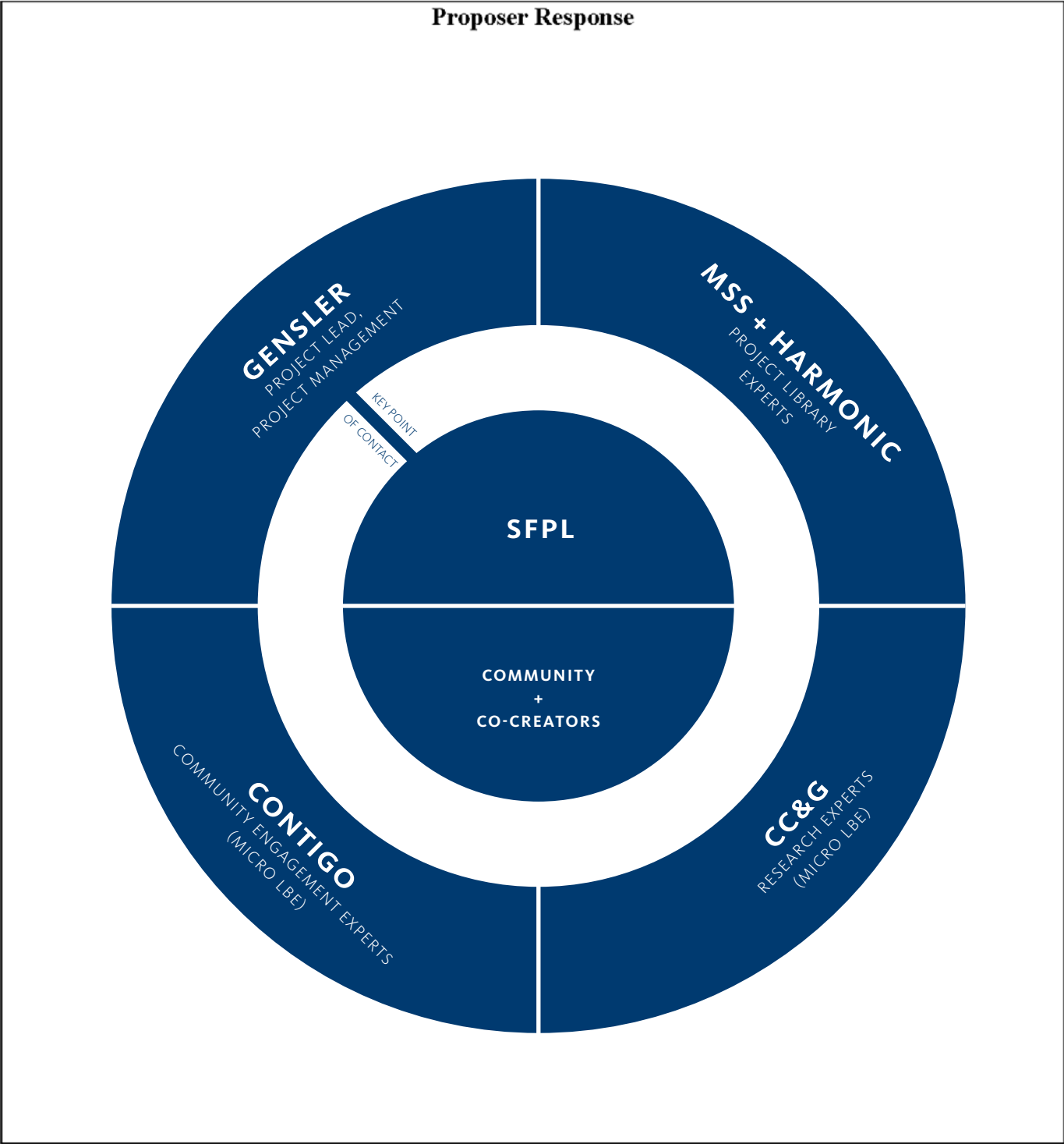
Strategic Plan Document Materials Development and Presentation Support

For SFPL, Gensler and MSS will produce thoughtful and creatively designed strategic plan documents, including toolkits, workshop books, and strategic road maps, in support of innumerable public library planning projects. All Team Partners are exceedingly qualified to provide presentations.

As-Needed Consulting

All team members take on extended as-needed consulting work that often follows intense engagements and are available to continue to offer such services to SFPL.

Question 3 Team Organizational Chart (5 Points): Insert JPEG (or other common electronic picture) into proposer response below of proposed Organizational Chart that illustrates the team structure (include the integration/interaction with City project team staff). Note the Proposer name and title/role for each team member.



Question 4 Key Team Members (5 Points): Identify and provide resumes for all staff who will serve as the Key Team Members so that the Evaluation Panel can evaluate the ability of each team member to successfully fulfill their project roles and complete the scope of services. If attaching resumes via a separate attachment please indicate below

Proposer Response

Please see resume's on pages 19-23, under MQ 4: Proposal

Question 5 Past Projects (5 Points): Describe three (3) projects previously managed by the Proposer or proposer’s project team within the last 10 years. Past work with library clients is highly desirable. Each project must be of the type and scope of services specified in this Solicitation. The descriptions shall include each item listed below.

Enoch Pratt Free Library Master Facilities

BALTIMORE, MD

Library as a Community Platform: Baltimore’s Marketplace for Healthy Community Growth

The Baltimore City, MD-based Enoch Pratt Free Library engaged Gensler, Margaret Sullivan Studio, and the Baltimore Neighborhood Indicators Alliance in a data-driven real estate and facilities master planning study to develop an extensive, system-wide plan that will provide analysis, guidance, and recommendations regarding service priorities with a focus on neighborhood community economic development catalyzed by a re-investment library facilities into the next 10 years. The Enoch Pratt Free Library sought a bold and aspirational plan that is future-focused and makes recommendations for services and library facilities growth by analyzing the existing 21 library neighborhoods EPFL serves and identifying service gaps and neighborhood development opportunities.

EPFL, under new leadership, had recently completed a strategic plan. Though our work was initially scoped as a Facilities Master Plan, our team applied a community-centric strategic planning approach to strengthen the outcome goals of the initial strategic plan. Our team re-positioned the strategic plan’s operational framework to a Community Economic Development framework as a vehicle to position EPFL’s embedded network of neighborhood branches as anchor institutions to contribute to upward mobility through place-based strategic initiatives strengthened by long term strategic partnerships. Additionally, our team created a recommended corresponding organizational structure, with updated staffing models and re-defined roles and responsibilities to activate the re-aligned system-wide re-imagining of people, places, and platforms.

Dates: 2022-Present

Cost: \$225,000

Role:
Strategist
Facilities
Master Planning

Staff:
Elaine Asal
Margaret Sullivan

**Project Delivered On
Time and On Budget**

Client Reference:
Heidi M. Daniel
Chief Executive Officer
Enoch Pratt Free Library/
State Library
Resource Center
hdaniel@prattlibrary.org
(410) 396-5395

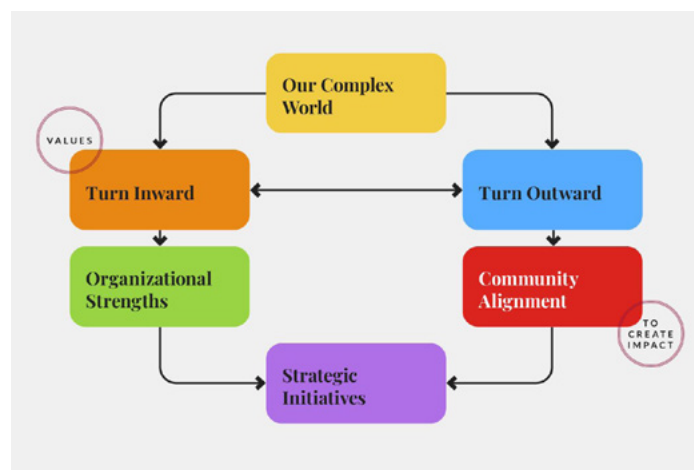
Question 5: Past Projects Continued

The Context and the Call to Action

Although Baltimore has had a population in decline since 1950, there are signs of growth and re-investment that are contributing to a Baltimore renaissance. There is a citywide focus on digital equity, workforce development, and local entrepreneurship with a lens towards economic inclusivity. With a majority Black population, Baltimore's residents continue to suffer from significant segregation and wealth disparities as a result of historic red-lining and racist planning practices. The city agencies operate in a mindset of austerity, as a result of the diminishing population, diminishing tax base, and years of an entrenched "silo" mentality.

Despite these challenges, the city has many brightspots such as its vibrant arts districts, engaged institutions and community organizations, public space investments, and a healthy social innovation ecosystem as well as a stated desire for political leaders and non-profits to work collaboratively to achieve shared outcome goals. The MSS, Gensler, and BNIA Team implemented an asset-based approach that incorporated inputs and co-creation from a wide network of City Stakeholders at all levels of City and Library Leadership, and incorporated staff's creative contributions in their role as community advocates. This work coincides with a renewed energy of collaboration among all of the city agencies and partners our team engaged with.

Furthermore, EPFL had just completed a multi-million dollar restoration of the 200,000 square foot historic Central Library. This investment, made possible by State funding, created an equity challenge for EPFL. With little to no capital funding consistently allocated to capital improvements of neighborhood branches, the state of EPFL's facilities represented years of disinvestment that undermine the mission and values of the American Public Library. EPFL engaged our team to generate an aspirational vision to invigorate a re-investment strategy for a system-wide strategic facilities plan with a corresponding staffing model. Re-imagined with an abundance mindset for growth through building staff and partner capacity, this plan recommended that each location have a Director of Community and Culture; each location align staff skills and talents for the outcome goals of each neighborhood; and EPFL work with strategic partnerships to grow capacity and impact. As a result, this plan will strengthen EPFL's essential role as a convener,



connector and amplifier for all of the community-based assets in Baltimore to flourish in service to the community.

A Process Rooted in Urgent Needs and Imagining Possibilities

We implemented a methodology similar to what we are proposing for SFPL. This includes extensive qualitative outreach to understand current challenges and opportunities from a wide variety of perspectives (staff, leadership, community members). We worked with the Baltimore neighborhood indicators alliance to leverage local data and understand community health relative to each branch, as well as applying a 20-minute city lens to how the branches work together and support community health, education, and development. The team developed an urgency index to map neighborhood needs, relative to existing locations, in order to better understand opportunities for service growth. Deep dives and site visits helped build a holistic understanding of the existing branch needs, and what partnerships and activations may be valuable to increase overall utilization and community engagement. The urgency index provides a data driven lens for validating current growth opportunities and evaluating new community requests and proposals.

Field trips with leadership and staff to locations both in Baltimore and DC inspired new delivery and partnership models to learn from, while recognizing more adaptive and community-led modes of programming and event hosting. These case studies, as well as national examples culminated in a more intentionally partner driven approach for future

Question 5: Past Projects Continued

growth, in service of branches more focused on community programming and activation. Staff engagement was also critical to inform key placemaking components to consider across all branches.

An Aspirational Vision:

Libraries as a Community Platform

The strategic goals for the library focused on Digital Equity and literacy justice, living your best life, being a center for culture and Community, Innovation and Entrepreneurship, and Youth Development/ Passion Based Learning. These strategic goals informed new roles and placemaking components that serve as launch points for community programming and engagement. System Wide partnerships with entities like Recreation and Parks, a local maker organization named Open Works, the Boys and Girls Club, or academic institutions such as Morgan State University could bring greater activation and alignment to existing branches.

For Enoch Pratt Free Library, the facilities master planning framework needed to be highly adaptable as well as practical. An ecosystem of Anchors, Nodes, Co-Locations, Storefronts, Mobile, Pop-Ups, and Program Partners provide a range of service location models and approaches across the system. Anchors functions as a sub-regional hub for EPFL programming and acts as a vital community resource point for both local and regional residents. With larger footprints, they can support more unique “destination features” such as incubator kitchens, co-working spaces, bi-lingual Storyville, climate justice lab, and a digital equity center. Nodes have a more consistent “one-room schoolhouse” footprint and support a wide variety of programming and activities with more multi-purpose spaces, embedded within their neighborhoods and supporting local residents. Co-Locations focus on future growth with greater alignment with new facilities either connected to Rec Centers, Academic institutions, schools, or non-profit organizations.

An Innovative Investment Strategy for Diverse Funding Sources and Sustainable Growth

Plagued by years of social infrastructure disinvestment, this plan will deliver an infrastructure for sustainable growth that will leverage all of Baltimore’s community partners to be active partners in the success. This will position the library as an essential connector and convener, contributing value to

the City to garner prioritized City funding. Furthermore, the plan delivered a comprehensive list of public, philanthropic, and public/private partnership funding sources for place-based and capital improvement plans in order to grow the library with all the funding sources available- federal, state, and local — to reverse the disinvestment due to years of systemically racist urban development practices.

[CLICK HERE FOR REFERENCE DOCUMENTS.](#)



Question 5: Past Projects Continued

Las Vegas-Clark County Library District Vision 2020 Strategic Planning & Implementation

LAS VEGAS, NV

We Don't Library Like We Used To!

The Context and the Call to Action

No other city, county or region in this country experiences the extreme booms and busts more than Las Vegas. The uncertainties and the exponential demographic shifts that occurred post 2008 in Clark County offers learnings relevant to understanding San Francisco's rapidly changing future demographic and the implications for social, learning, and workforce needs and, ultimately, for the city's library.

In 2015, Las Vegas was still coming out of the 2008 recession and continued to demonstrate stagnant recovery, growing economic disparity, a rapid increase in immigrant communities, and an immediate need to create pathways for middle class financial security.

In response, the Las Vegas Clark County Library District (LVCCLD) embarked on research with over thirty “early adopter” staff members to foster social impact in the context of an urban—or economic development—agenda that would galvanize recent program innovations, partnerships, and assets as well as activate the library's 30 urban and rural library buildings.

A Process for a Vision

This launched Vision 2020, which provided insights into customer demographic conditions; future competitors, such as Amazon, Google, Starbucks; and future growth and change for the library's business model. Needing a process for acting on these insights, the library was especially interested in Richland Library's “Library as Studio” methodology developed with Margaret

Dates: 2016-2021

Cost: \$200,000

Role:

Strategist

Designer

Professional
Development

Master
Facilities Planning

Staff:

Margaret Sullivan

Patrick Quattlebaum

**Project Delivered On
Time and On Budget**

Client Reference:

Danielle P. Milam
Former Director of
Development & Planning
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daniellepmilam@gmail.com

Question 5: Past Projects Continued

Sullivan Studio (MSS), which is grounded in human-centered, community-driven and co-creation approaches aligned with a city's urban agenda.

MSS was engaged in 2016 to build on the Vision 2020 work, to design workshops with staff for co-creating strategic areas of focus, designing a system-wide implementation toolkit, and building the institutional confidence, competencies, and tools to activate the facilities 100% of the time for human-centered, community-focused experiences and strategic initiatives. MSS began by auditing and synthesizing a newly commissioned market segmentation analysis, a revolutionary approach for libraries, that revealed lifestyle behaviors combined with behavioral use-patterns of core customers.

With the synthesized analysis, MSS designed the second half of the strategic process to identify strategic areas of focus, such as defining future services, programs and collections to meet the needs of the complex community conditions. and to design workshops with staff for co-creating strategic areas of focus, designing a system-wide implementation toolkit, and building the institutional confidence, competencies, and tools to activate the facilities 100% of the time for human-centered, community-focused experiences and strategic initiatives.

MSS conducted a staff engagement workshop process to elicit deeper insights, asking: Who are we Designing for and Why? What are the Community Characteristics? What activities and programs will we provide? What are the outcome goals we envision for our community members?

A Bold Vision for Community Impact

It yielded a bold vision to grow the library business as a leader of the Vegas Valley, using the urban agenda concept as well as community economic development best practices, such as building and amplifying partnerships, aligning strategic priorities, and enhancing coalitions and funding sources.

Additionally, it:

- Provided LVCCLD leadership with knowledge for growing their market share, the ability to apply market segmentation patterns and behaviors to grow relevant services, and confidence for focusing their capital investment and facilities growth strategies.
- Allowed staff members to focus on their business growth

at a relevant localized community level while LVCCLD leadership developed curricula including for whole family development, new immigrant services, workforce development, and cultural programming.

- Set system-wide customer experience expectations and empowered the staff to design their customized community playbook, while aligned as a system.

Following this strategic work, MSS has continued to work with the District as library strategist, facilities designer, and staff development consultant. Serving as an integrated collaborator to the Executive Leadership Team, and in partnership with expert consultants for a series of consulting contracts, MSS's continuous engagement has been critical to the successful implementation of the Vision 2020 Strategy.

In 2018, MSS and Harmonic Design were engaged to work with LVCCLD and Nevada One Stop to generate a shared set of outcome goals, experience principles, and design a seamless service model. As partners to increase access to workforce development, Nevada One Stop was co-located in several District Library libraries. It was a win-win for families who could enjoy the library's family-centric and ESL services, but it was challenging for these two organizations, with vastly different institutional cultures and success metrics, to operate for the customer as an integrated partner. LVCCLD engaged

[CLICK HERE FOR REFERENCE DOCUMENTS.](#)



Question 5: Past Projects Continued

MSS and Harmonic Design to forge a new customer-centric service model co-created by the staff of both institutions.

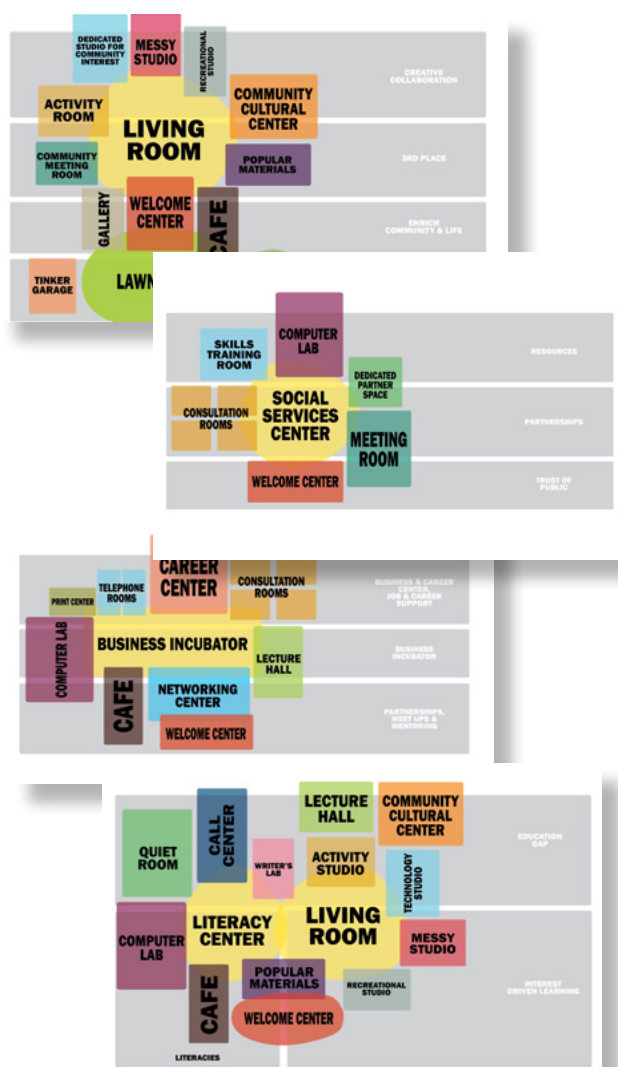
Subsequent projects have included the LVCCCLD's innovative facilities master plan, its implementation and the design of two revolutionary facilities informed by placemaking and cultural relevancy—East Las Vegas and Mesquite. The trusted relationships, teachings, and inspiration MSS has contributed as an integrated collaborator and thought leader has allowed the ongoing professional growth and evolution of over 700 staff and strategic partners.

In a recent staff survey, 75% of staff believe this community-driven agenda is core to the library's role, and they are confidently aligned with Vision 2020's strategic areas of focus. Vision 2020 also grew foundation and development dollars, with an early childhood initiative based on Mind in the Making (Bezos Foundation), and teen and youth development out-of-school-time initiatives (Best Buy).

Most importantly for current conditions, Vision 2020 increased LVCCCLD's visibility and credibility with the critical partners necessary for a collective impact model as Vegas comes out of the pandemic crisis. This includes working with Nevada One Stop to help significant numbers of unemployed find living wage work; and the Nevada Children's Museum on a strategy to address the 75% reduction in FNN early childcare providers for service industry families.

The strategy did what it was designed to do to generate a daily community impact: created adaptable facilities and a change-ready staff equipped to mobilize new services, as well as provided the tools for all staff to activate and optimize LVCCCLD's resources.

VISION 2020 Strategic Activation Diagrams



Question 5: Past Projects Continued

Salt Lake City Public Library Strategic Visioning & Roadmap

SALT LAKE CITY, UT

Strategic Planning in a Deeply Weird World

Margaret Sullivan Studio (MSS) began working with Salt Lake City Public Library in 2016 with a Visioning and Programming contract to re-imagine three existing facilities. That work introduced The City Library to the human-centered, community-driven service design methodology. Informed by community needs research, community engagement synthesis, and an “imagining the possibilities” education, staff designed future customer experiences activating the library’s holistic service model (spaces, collections, technologies, staff skills and talents, and partnerships) in highly participatory workshops, designed and facilitated by MSS. Resulting in a deeper understanding the powerful role facilities perform to activate 21st century learning, staff were invigorated by their learnings, their contributions, and were affirmed when MSS was able to clearly

articulate their vision for the community’s future library experiences, rooted in patron’s needs and aspirations, in a qualitative and quantitative program narrative to inform future facilities design projects.

Peter Bromberg, Director of Salt Lake City Public Library, saw the value in this iterative and inclusive design methodology that built on the strengths and assets of the community and The City Library’s existing deep values-driven culture, and approached Margaret Sullivan with the following three “How Might We” challenges:

How might we apply this methodology to The City Library’s upcoming strategic planning process to create an adaptive organization to meet the needs of a complex, diverse community in a radically uncertain future world?

Dates: 2017-Present

Cost:
\$90,000 + \$300,000

Role:
Strategist

Master
Facilities Planning

Staff:
Margaret Sullivan
Patrick Quattlebaum

Project Delivered On
Time and On Budget

Client Reference:
Deborah Erhman
Acting Director
Salt Lake City
Public Library
801-259-1154
dehrman@slcpl.org

Question 5: Past Projects Continued



[CLICK HERE FOR REFERENCE DOCUMENTS.](#)



How might we professionally develop staff to be able to show up each day with strategic intention, and to confidently practice 21st century librarianship by adapting and responding in real time to the community's needs to create unique "customer services journeys," and "moments that matter?"

How might we use this process to co-create a flexible, adaptable Strategic Roadmap with Salt Lake City's community development ecosystem, including city leaders, community-based partners, staff, and board to embed collective impact, deepen the community feedback loops, and inspire strategic partnerships through shared social impact outcome goals?

Designing the Methodology: Setting a Revolutionary Process up for Success

MSS, having worked with Patrick Quattlebaum to create Richland Library's Library as Studio, invited his newly formed Studio to design the 1st of its kind Strategic Planning methodology to respond to Peter Bromberg's Call to Action. Over the next month, MSS, Studio PQ (Harmonic Design) and City Library leadership created a methodology, approach, tools, and five-phase, year-long work plan.

MSS and Harmonic Design managed the process, facilitated community engagements, designed the innovative participatory workshops and the innovative tools, and audited, analyzed, and synthesized the inputs to ensure the goals of each phase were met to meet the project's milestones. Because it was the first of its kind strategic

planning work undertaken by the library industry as well as the Salt Lake City Public Library, the team built in assessment and re-alignment procedures through weekly meetings to adjust the process as needed in real-time. Key to the success was creating a culture among the project leaders of encouragement, inspiration, openness, lack of judgment, collaboration, high trust, constant communication, and the "forgiveness of failing forward," critical best practices required of growth, change, and innovation.

The Impact: Revolutionizing the Library Industry through Community Co-Creation

The work resulted in the following:

A community and staff co-created a nimble Strategic Roadmap with a flexible set of guiding strategic areas of focus that have only been continuously "practice, prototype, assess, and refine" forming a dynamic adaptive organism in total service to the community.

Positioned The City Library as a lead convener, connector, and catalytic contributor in Salt Lake City's community economic development eco-system. SLCPPL enjoys the community's trust, knows the community's needs, provides data-driven evidence in support of the community's needs, and brings partners together to design services to generate shared social impact outcome goals.

Professionally developed staff with human-centered service design techniques. SLCPPL built radically inclusive practices of empathy, compassion, and sensemaking with storytelling and

Question 5: Past Projects Continued

designing customer journey narratives. This enables a “take action” entrepreneurialism through a culture of creativity, collaboration, and critical inquiry, rooted in designing experiences for all.

Professionally developed the staff to have the confidence, competencies and tools to embrace change, envision and design future patron services, and grow internal systems to create meaningful experiences for all patrons. This ensures short term and long-term work is in service to the community’s advancement.

Built in effective measurement and assessment tools in order to rapidly re-align institutional operations for relevant and specific strategic outcome goals, applying the deep understanding of the “in-real-time” aspirations, needs, challenges of patrons, partners, and the community to generate strategic impact.

Emboldened the value proposition of The City Library with a new Culture Statement (organizational values) Experience Principles (how to create differentiated and valuable customer experiences), and a re-commitment to the Mission. With these as the constants, The City Library staff is empowered with both a clear guide to how to approach services with shared expectations and accountability, and the entrepreneurial mindset, empowered by the tools and permissions to improve services, create new services, and to abandon services that are not impactful.

Generating Organizational Stability: An Adaptable Machine Embracing Change

MSS has been involved for over six years with The City Library, applying the inclusive design methodology as a library strategic consultant, community relationship building, designer, and inspirational staff facilitator. The City Library, led by Peter Bromberg and Deborah Erhman is also experiencing a leadership transition, as Peter Bromberg resigns to focus on his work with Every Library. It is through this that we are witnessing the most important aspect of this strategic work. With a confident Vision, Values, and Mission, the Strategic Roadmap is enabling a stable and healthy transition of leadership as Deborah Erhman becomes the Acting Director. The board, leadership, and staff continue to be guided by this groundbreaking work.

A Revolutionary Strategy creates a Revolutionary Master Facilities Plan: Library as Social Infrastructure

MSS continued to work with The City Library from 2020-2022 to generate the first Master Facilities Plan in the country to position the public library as an essential leader in equity-driven urban development. As a dense urban system facing affordable housing challenges, displacement and gentrification issues, and growing wealth and resource disparity, this plan built on the social impact strategic focus areas. The plan created a facilities approach to re-align existing facilities to be more impactful, and provided a growth strategy to introduce innovative typologies and services. Using the 15-Minute City structure, the design team and client team worked collaboratively to identify resource deficiencies related to quality-of-life needs. Additionally, a system of “Hubs, Branches, Sprouts and Seeds,” - mobile outreach vehicles, pop-ups, storefronts, and library-owned facilities - create an experimental system to “play” with ideas, co-create space with the community, and provide the library system a flexible framework for growth in a rapidly changing city. MSS continued to meet with community partners that informed the strategic work, strengthening shared impact goals. Furthermore, as a result of this work, the Mayor has championed the library as the development anchor in a series of city-wide development projects.

Question 6: Work Approach Quality and Appeal (10 Points): Proposer must describe their overall work approach to successfully deliver the Scope of Work for this Solicitation, by addressing the quality and appeal of approach for delivering all work activities, including coordination and communication with Library staff, to meet project milestones and deliverable due dates within budget.

Proposer Response

“WE HAVE TO IMAGINE A DIFFERENT FUTURE, EVEN IF WE WILL NOT EXPERIENCE THAT FUTURE OURSELVES.”

Dr. Angela Davis in conversation with Dr. Mary Wardell-Ghirarduzzi, President, San Francisco Public Library Commission

Today, our society is at a critical inflection point. The choices and actions we take will determine our collective future. Given the challenging and complex conditions in which we find ourselves, we understand this work to be a strategic planning process to align San Francisco Public Library’s 21st century library services with community ambitions and institutional goals. Recognizing the ambitious and impactful goals for this effort, we have assembled a uniquely qualified Project Team that will build on SFPL’s institutional strengths demonstrated in the 2016-2021 Strategic Plan, as well as champion SFPL staff’s deep commitment to their communities.

Our approach to managing the SFPL strategic planning process is tailored around co-creating a collaborative environment which is agile and fluid. Each activity builds upon previous activities to create ideas and deepen an understanding of the core issues that will inform the SFPL Strategic Plan. Through this process, we generate a variety of integrated deliverables including data analytics to provide clear evidence of current need and future demand, to illustrate the areas of San Francisco experiencing the most extreme social and economic disparities, library facility analysis to understand current use and future opportunities, and community asset maps to illustrate gaps and strengths of San Francisco’s current social impact eco-system. We will provide planning strategies to position SFPL as a leader in equity-driven urban planning methodologies, prioritization diagrams and recommendations to launch a successful implementation strategy, partnering best practices and strategies to foster sustainable long-term partner successes, and clear guiding planning principles to create a shared decision-making

structure when unexpected scenarios inevitably will arise. This process keeps the project moving forward within the defined schedule.

This strategic work will be conducted in six phases. The final strategic document will be delivered in December 2023.

Phase I: Launch: Planning, Current State Research & Analysis

Phase II: Discover: Information Gathering, Research & Analysis, and Community Outreach

Phase III: Sensemake: Identify Strategic Alignments

Phase IV: Iterate: Envision Future Community & Employee Experiences

Phase V: Refine: Create Strategic Roadmap & Toolkits

Phase VI: Document: Strategic Roadmap Feedback & Documentation

Phase I: LAUNCH

We begin planning with a process of collaboration to get to know each other and the details of each library’s objectives — goals, aspirations, current challenges, and a visioning session for the future. This stage helps determine the strategic vision and principles that guide decision-making throughout the process. We’ll develop a tailored engagement process to engage the community, SFPL staff and leadership, and stakeholder partners that sets up the next phase for success.

Key activities: planning and outreach; developing a communication and community outreach roadmap; analyze existing data and resources (mission and values; analyze emerging resilience needs as documented in the Hazards and Climate Resilience Plan and Climate Action Plan; etc.); bi-weekly meetings with client team.

Question 6: Work Approach Quality and Appeal Continued

Phase II: DISCOVER

This phase is where we deeply research and engage with the community, with SFPL staff and leadership, and stakeholder partners. Research takes the form of interviews, focus groups, workshops, surveys, and observational studies. We'll uncover the challenges of existing facilities and current users; the condition and capacity of infrastructure, accessibility both physical and cultural/linguistic; and constraints. Our team will use a "data-driven, community-led" approach, working closely with community and key stakeholders to analyze the major drivers and needs of the project and devise strategies that are embraced and actionable. We'll conduct site visits to understand local branch context and field trips to inspire next generation library experiences. We will continue community engagement throughout the duration of the project to refine and test strategic priorities.

Key activities: surveys and interviews with partnership stakeholders and key informants; surveys and workshops with staff and leadership; surveys and focus groups with external community; site visits to library branches; inspirational field trips; utilization studies; research library industry best practices; research city planning and development initiatives; bi-weekly meetings with client team

Phase III: SENSEMAKE

The synthesis of our research leads to insights and opportunities that drive towards strategic alignment. Sensemaking is captured in the form of a Discovery Report which may include library framework diagrams, identifying high-level ideas, areas of each library that are sacred spaces to be preserved, areas to be improved, opportunities as well as reimagining the future in our post-pandemic environment.

Key activities: synthesis and analysis of qualitative and quantitative research; staff sensemaking and sensesharing; develop a Discovery Report to summarize insights and findings; recurring meetings with client team

Phase IV: IDEATE

We will test new ideas and concepts of how to organize the future strategic planning approach, accommodate new footprints, create new linkages, enliven the civic realm, consider resiliency approaches, and think about the library at different scales through an equity-driven lens. Through a deliberative, interactive, and collaborative process of evaluation, we can begin to select those strategies which merit further study and development.

Key activities: workshops with staff and leadership to strategically co-create vision and plan; recurring meetings with client team

Phase V: REFINE

In this phase, the strongest concepts will undergo refinement. The plan takes shape, adding specificity through key principles, narratives, diagrams, and metrics. Community partners and members engaged during Phase II will be invited to help refine concepts. We will begin developing iterative drafts of the SFPL Strategic Plan for review.

Key activities: detailed development of strategic plan; workshop with staff and leadership to co-create and refine strategic vision and plan; workshop with community to refine strategic vision and plan

Phase VI: DOCUMENT

Upon approval of the strategic planning principles the documentation of the plan commences—preparing report drafts for review and feedback. Consultants will assist in preparing an implementation strategy with toolkits and resources for staff. The planning process and recommendations are documented in a report that captures the full analysis generated with a bold strategic vision for the future.

Key activities: draft final documents; working draft presentation to leadership; presentations to Board, Leadership, and the public

Question 6: Work Approach Quality and Appeal Continued

We will Deliver:

A bold, inspirational Vision

A confident Mission with a clear role and purpose for the San Francisco Public Library to lead a values-driven Social Infrastructure and Community Economic Development strategy, centering all.

Values designed for radical inclusion, radical listening, and radical learning.

An organizational operating system that will be the “Next Practice” for 21st century public library work in complex urban communities, embedding Coalition Building and Community Feedback Loops in San Francisco Public Library’s daily practice to continuously enable data and best practices to inform collections, programming, services, and capital decisions in a rapidly changing San Francisco.

This work will generate Strategic Outcomes:

SFPL will be an institution designed by the community’s voices, adapting services in real time to evolving community conditions with creativity and collaboration.

SFPL will connect, convene, and catalyze San Francisco’s public service ecosystem for amplified social impact in service to San Francisco’s diverse communities.

Empowering SFPL with an activation strategy outlined in the following Deliverables:

- Strategic Planning Document
- Vision
- Mission
- Values
- Strategic Initiatives and Toolkits
- Strategic Implementation and Assessment Goals
- Facilities Realignment and Activation Strategy
- Partner Relationship Strategies and Guidelines for Sustainability and Success
- Appendix
- Strategic Process Worksheets
- Assessment Methodologies

- Community Acknowledgments
- About the Process (Discovery Summary)
- Audits, Inputs, and Analysis (Discovery Summary)
- Demographic Analysis (Discovery Summary)
- System SWOT Analysis
- Business and Operations Scenarios

Approach to Project Management

Strategic and innovative work is a team sport. We value co-creating and partnership. Our methodology is participatory and interactive. Strong project management is about communication, leveraging the talents of the team, and supporting every team member to ensure the process runs at the agreed upon pace. In strategic work, this requires sophisticated project management expertise. SFPL will benefit from the experience and breadth of Gensler, the expert experience MSS has had at creating new methodologies that require real time re-direction, the deep community trust of Contigo Communications, and the market analytics expertise of CC&G. Gensler will provide project management throughout the different phases of work, including managing the sub-consultants.

We believe in a consistent and streamlined communication approach to make sure information is shared as efficiently and quickly as possible. At project start-up, we will establish “ground rules” to govern communication and reporting throughout the project process. Once agreed upon, the Project Team will document the communication protocol and distribute for team use. Gensler will coordinate dissemination of information provided by Client to the project team, communications from the project team to the Client, and submission of all deliverables.

For the first two phases, we’ll create a rhythm of bi-weekly hour-long virtual meetings with SFPL’s strategic project management team. These touchpoints allow for planning, informal strategic conversations, clarifications, reflections, and re-directions in real-time, and will continue until Phase III, when the frequency will be assessed.

Question 6: Work Approach Quality and Appeal Continued

Our approach is to create space at the table for diverse perspectives to debate ideas and provide opinions and options when appropriate. We approach problems quickly, pro-actively, and with curious minds and compassionate hearts. We have developed tools and techniques to insulate our projects from pitfalls—daily communications, along with the close working relationship we establish.

We focus on project management with the following approaches:

Caliber of People. The team we have proposed for your project is highly qualified. As Project Co-Leads, Michelle, Midori, and Elaine are responsible for the day-to-day efforts. Midori will serve as the point-of-contact with SFPL and our team to keep the project on-schedule and within the established budget.

Solidify Scope. It is paramount to clearly define and agree to the project scope at the beginning of the project. Project goals and priorities, and the strategies to accomplish these are set from the start. Once defined, it is important to avoid or manage scope creep. Potential risks and mitigation actions will be identified and addressed, and changes from the baseline plan are evaluated for impact to schedule and cost.

Be Realistic. At project start, it is critical to set realistic completion dates to ensure we are working on an accurate and manageable schedule.

Clear Roles and Accountability. Workstreams and tasks will be aligned within the partner team through a roles and responsibility matrix. A roadmap and regular communication and check-ins will ensure a fluidity of conversations and efficient delivery. Gensler will help facilitate the decision-making process through an agreed upon “decision matrix” to target critical decisions at the correct time.

Building On Each Other’s Strengths. This is a highly collaborative process and a highly collaborative team. Our goal is to make sure we are amplifying our relative strengths through the work, and bringing our best collective selves to this project. We will adjust as we go, to

manage the complexity of the task at hand, and ensure the team is able to deliver effectively and efficiently.

Communicate, Communicate, Communicate. Team members are in constant communication with one another. Virtual communication is a natural part of our process. The team utilizes a variety of tools (such as Microsoft Teams and Sharepoint) to streamline project management and facilitate communication on projects—virtually and in person—tailoring the process to the client’s preference. We use a virtual whiteboard tool (Miro) to collaboratively facilitate workshops, townhalls, or as an on-going communication tool between stakeholders and the team. We also have the expertise to leverage tools like video, websites and apps, digital guides, QR codes, VR/AR for rich participant engagement.

Approach to Community Engagement

To ensure diverse and robust participation especially from disadvantaged and traditionally hard to reach communities, designing an equity-minded community engagement strategy with SFPL is critical. Every touchpoint with a San Franciscan is an opportunity to listen and learn. With the deep community knowledge that LBE’s Contigo and CC&G will contribute, we will engage with additional community organizers and partners to galvanize the trusted networks that already exist in San Francisco’s neighborhoods. Our community’ engagement work with SFPL will not only be successful, but also visionary, thought-provoking and meaningful as it will help ensure library resources are designed to better serve diverse residents that are often left out of planning processes and as such denied access to available resources.

With a team that teaches organizations conflict resolution techniques and racial equity training, we are confident that we will create the conditions for all participants to feel valued. Holding tension with others that have different life experiences is essential to racial equity work and developing shared foundational understanding of the benefits of collective planning and work. Our racial equity experts will bring skillful facilitation and engagement practices that help participants hold tension as they

Question 6: Work Approach Quality and Appeal Continued

envision better solutions and systems, learn to leverage the expertise of diverse staff, and better serve all users.

Successful engagement will connect with the broad diversity of users, nearby businesses, neighbors, and residents. We strive for a transparent public discourse that:

- Engages a Robust Dialogue
- Promotes Racial Equity, Diversity and Inclusion
- Establishes a Transparent Process
- Builds Trust and Relationships
- Flows Seamlessly from In-person to Online Tools
- Is Data-Driven and Human-Centric
- Targets Outreach to a diverse constituents
- Continues the Conversation Beyond the Project

Our team will integrate a variety of engagement and planning tools including user surveys, idea submission, feedback loops, and user voting, and using the interactive “town hall” techniques, we will encourage participation, inclusiveness, and transparency in the process. In addition, our team can assist SFPL in the design, launch, and maintenance of a website to distribute strategic planning information and serve as a repository for graphics, presentations, and reports.

Our team brings a dynamic set of tools, and a team of individuals with strengths to facilitate participatory, energetic, empathetic, and meaningful community engagement, executed with justice-centered inclusive practices. The process will also leverage community assets, including community leaders and community-based organizations alignments to result in a collaborative community impact model that strengthens the role of the library, facilities, and partnerships.

At the onset of the Project, we will collaborate with SFPL to develop a Public Outreach and Engagement Plan to outline responsibilities, communications coordination with SFPL, and plan deliverables. The key components of the outreach program will be:

1. Conducting a community scan of area stakeholders (forming the basis of our project’s communications and engagement list)
2. Identifying and enlisting the support of trusted community partner organizations to help engage hard-to-reach participating in the listening tour
3. Developing and maintaining regular and transparent two-way communications to effectively convey project progress, including meetings and communications prior key milestones and strategic plan approval

By identifying and engaging a few select key partners that have demonstrated success in serving and engaging diverse populations in San Francisco, such as low-income, non- and limited-English speakers, disables, seniors, LGBTQ+ and BIPOC community members, we will be better positioned to reach these groups. We also plan to compensate up to five community nonprofit partners for their time, effort and possible use of their community non profits spaces.

Our team applies an Asset-Based Community Development approach that uses strengths, motivation, and small group conversations to create safe, comfortable environments to invite all to contribute. Our engagement techniques include Directed Storytelling, Customer Journey Mapping, AEIOU Observation techniques, Case Studies, Service Safaris, and potential tools designed with SFPL.

We are out-of-the box designers and consultants employing experience and “take action” techniques to build on these for outreach best practices. We will:

- Build from previous processes
- Utilize current SFPL structures spanning mobile, online, print and in-person methods
- Work with the SFPL to conduct multilingual approaches
- Amplify messaging using existing social media outlets (City & SFPL Communications Departments, Library, Parks and Recreation, etc.)

Question 6: Work Approach Quality and Appeal Continued

- Engage with existing City boards and commissions
- Develop engagement materials and collateral for events and organizations
- Engage SFPL's community ecosystem: school districts, non-profits, business community

For one-on-one key stakeholder conversations, we apply a systemized approach, framed around the same questions, as designed with SFPL's leadership team, to both encourage candor and to lift common themes. This will generate a data-driven input set to reveal key community alignments.

With focus groups, we apply best practices for communities to share their ideas and honest reflections through small group conversations. We recommend 8-10 participants per group to allow for all present to meaningfully participate, but will work together with SFPL to determine the target composition and number of participants for each group. Much has transpired since the pandemic, and some of our discussion will tease to what extent people's understanding of "library services" has shifted since the start of the pandemic. Creativity in visioning the future will be encouraged through ideation, thought-starter worksheets or thought-provoking questions, and organizational brief exercises. This encourages community learning, fostering deeper dialogue, to result in shared challenges, aspirations, and future library roles and services. Focus groups will primarily be held virtually as that has been the new norm in our post-pandemic environment, but some focus groups will be in-person for target populations that are not technologically literate or have access to the internet, such as seniors. We will work with SFPL and our engaged non-profit partners to identify what works best for each population target.

We plan to deploy both a library patron survey and a community survey. The surveys will be available in multiple languages and will be deployed in respondent-friendly formats, including in-person and online. Collectively, our team members are fluent in Spanish and

Mandarin, and are able to source other language support as needed through the local Gensler office. Our questions garner valuable insight into community member's values, priorities, and challenges. We ask questions about their life priorities, hobbies, how they spend their free time, what they love about their communities and how they use, or would like to use, their neighborhood library. These questions can build on the behavior patterns of SFPL's current insight. From these robust research efforts we anticipate having ample data to be able to analyze the needs of both library users as well as community residents who do not currently use the library but will likely be future users, as the SFPL branches evolve. Our two-pronged research effort will allow us to provide a quantitative research analysis which clearly identifies which library attributes are important to both library users and non-users. This will be a key finding since it will identify what features of the SFPL library are most valued by members of the community, whether they currently use the library or not. Additionally, the quantitative data will be segmented geographically by supervisorial district which will allow SFPL to visualize specific needs and preferences by geographic area. Each of these quantitative research efforts will provide important, statistically reliable, context that will play a key role in the development of the strategic plan for SFPL.

One of the most insightful tools we deploy is a Leadership and Staff Questionnaire. Staff members will complete these during Phase I. This set of nine questions, completed by Main and all neighborhood library location team members, reveals the deep knowledge that staff have about their communities, the user characteristics, existing and future partnerships, and their vision for their community members. This is one of the most important tools the team will use to understand and validate unique community characteristics and engage staff meaningfully at the beginning of the process.

Question 6: Work Approach Quality and Appeal Continued

Approach to Engaging Stakeholders and Partners to Identify Strategic Alignment

In addition to the learnings from the community, our process will learn from peer leaders across the City. These engagements are critical to educate peer leaders about the role of the 21st century library, communicate how the library can be synergistic and effective partners to amplify shared community outcome goals, and hear from them what their vision of a prosperous, just San Francisco will be.

These formats can be one-on-one key informant interviews, small focus groups conversations, and/or a series of workshops. We encourage the gathering of community-based organizations and library partners to participate in focus group conversations and workshops to articulate shared outcome goals and alignments, while also communicating strengths and gaps. As evident in all our strategic work with libraries, these conversations will reveal clearly SFPL's contributing role, leveraging SFPL's already trusted position as a powerful convener, connector, and respected coalition builder.

Existing Documents and Local Initiatives Audit

Our team will collect existing relevant SFPL documents. We will conduct a systematic analysis of the documents using our tools, such as the team's archival analysis checklist tools and qualitative analysis technique. The analysis will uncover themes that capture the current alignment of policies, procedures, and communications with the library's mission and vision, as well as implications for meeting stated racial equity goals.

Examples of documentation include relevant policies, procedures, strategic plans, brochures, videos, flyers, research reports, demographic data, outreach communications, hazard resilience and climate action plans, and other documents deemed important to the project. This analysis will illustrate a baseline "current state" to serve as a marker for the "future state" visioning.

Readings & Research

Strategic work is a privilege enabling us to deepen our knowledge, and broaden our learning for what SFPL will be for future generations. In addition to the tasks outlined in the RFP, we will encourage all team members to engage in readings of seminal industry papers, as well as engage in study about community economic development work, collective impact work, the United Nations vast body of work on human development, equitable practices, Sustainability Goals, and their recent Happiness Report assessments. Team members are well-versed in some of the most important recent research that can benefit this work, including social infrastructure, 15-minute cities, and the science of happiness. Gensler and MSS have also been investigating Enriched Environments, the science that proves that beautiful, natural, and active environments stimulate the brain to stimulate a sense of social safety and increased learning. These are the same principles that were applied to developing the Public Library Association's Every Child Ready to Read principles and can be powerful knowledge to deepen SFPL's

Value Proposition

The team is also deepening our research and knowledge around the role public libraries will play as community economic development engines, applying social impact metrics proven more effective at building social capital than conventional public library metrics. These practices are also already embedded in Connected Learning principles that center the teens, build their healthy ecosystems, and leverage partnerships. This is happening in The Mix daily, with poetry slams with Valencia 826, for example. With ten years of learnings, we can take the "Learning Lab" work to scale, applying practices to all ages and stages of growth.

Finally, the Federal Reserve Bank of San Francisco issued a monumental Call-to-Action two years ago that proves the impact of Creative Placemaking to foster community wealth and health, titled, "Creative Placemaking in Government: Past and Future"

Question 6: Work Approach Quality and Appeal Continued

Our team embeds these practices of Placemaking in our inclusive design methodology, and looks forward to amplifying SFPL's impact with the strategies outlined in this seminal body of evidence.

Designing an Organizational Strategy – Going Beyond Coordination and Communication with Staff

The Project Team will work with SFPL to create a successful SFPL internal organizational strategy. Ready implementation and sustained culture growth will result from service design techniques this team will introduce to SFPL. Organizational change begins from Day 1 of this process as we will engage leadership, community, staff, and other actors holistically within a participatory design process.

We propose a series of highly participatory staff and leadership workshops to co-create strategy, applying human-centered service design techniques. We will carry over learnings from similar projects with Salt Lake City Public Library Strategic Roadmap, Las Vegas - Clark County Library District's Vision 2020, and Prince George's Memorial Library System's successful "Anti-Racist Library" strategic roadmap (see, Question 5), and use those engagement workshop "modules" as case studies, incorporate the plethora of experience this team brings, and customize a workshop strategy for SFPL. Our team will be able to continue the professional development through the iterative process, applying the exact methodology staff and leadership learned and applied.

Bold Visioning & Futures Strategy

The most successful strategic work is when the team engages in visioning at the beginning of the work. Our team brings a plethora of interactive worksheets and workshopping techniques to challenge ourselves to begin this work with the boldest, biggest, and grandest visions that will energize and encourage everyone to be their most creative, innovative contributors throughout the process.

This also provides the team time to understand the future social, technological, economic, environmental, and

political forces that will disrupt the industry through future scenario-creating, applying research such as ALA's Future of Libraries to benefit this process. Scenarios are a great tool during strategic work. They are one of the best, and most fun, tools to prepare our institutions for uncertain futures. Our strategic approach is nimble and co-creative, involving the perspectives and talent of your organization and the greater community to explore possible futures together. As we partner closely, we will explore different models for how the library's services and ways of working may evolve to achieve strategic objectives.

Benchmarking, Case Studies, & Field Trips

Our team will deliver benchmarks and case studies of public libraries and community based organizations that have embraced a community economic development strategy. This enables a more substantive critical inquiry approach by understanding peer organizations' community's conditions, that organization's "current state" when the strategic work began, and the time and processes it took (is taking) to achieve the strategic vision. Traditionally, in public library strategic planning, the "benchmarking" methodology is used to compare similar sized organizations for operational metrics and to identify "best practices." As our work focuses on "next practices," we will use these comparative studies to illustrate how impactful library strategic plans have propelled the industry forward. We will apply these learnings to this project, and build on the community-centered, outcomes-oriented goals to structure SFPL's, strategic work, as a national leader in innovative library initiatives, to continue to add "next practices" to the library industry's evolution.

What we have learned from analyzing peer library's strategic work is that Year One is focused on "Building the Culture." By the end of the first year of implementation the entire library organization is equipped to live the organizational values and know how to listen and learn from the community. Year Two is focused on "Prioritizing and Prototyping" strategic initiatives to "Really Know the Community," and learn how to assess and measure success with a service design, community-centered, "feedback loop"

Question 6: Work Approach Quality and Appeal Continued

competency. And the final year is “Refine and Embrace” in order to “Build the Business.” With this initial investment in organizational transformation, the library’s impact will grow exponentially, based on evidence of this approach with peer urban libraries including Richland Library, Salt Lake City Public Library, Fort Worth Public Library, and Las Vegas-Clark County Library District.

Additionally, we will identify place-based local and regional organizations that are engaged in aligned mission-driven work to visit and analyze as case studies. These visits 1) enable our team to learn how aligned organizations in San Francisco excel at their work, and how they activate their staff, partners, places, and resources for success 2) enlighten the team with even more knowledge of community needs by seeing how these organizations are filling gaps in the community with their deep knowledge of overlapping constituents 3) create an opportunity for SFPL synergies, partnerships, and program amplification to strengthen the City’s social impact eco-system.

These benchmarks and case study visits have been important catalysts for organizational change. When Richland Library wanted to introduce a culinary kitchen into the design and programming for the Northeast location, we first did this benchmarking and case study research. The client and design team spoke to the leadership teams of the two “best practices” in library culinary kitchen programs at the time—the Philadelphia Free Public Library Culinary Literacy Kitchen and Hartford Public Library’s workforce development partnership cafe with Forge City Works. We also visited the University of South Carolina’s nutritional culinary kitchen to learn about their curriculum, which informed our program and facility design. The visit also resulted in a system-wide program partnership with Richland Library and the University of South Carolina’s culinary programs.

Most recently, the Gensler/ MSS Design Team hosted the Enoch Pratt Free Library to two full days of Case Study visits in Baltimore and Washington, DC. These visits to Community-Partner Incubators (The Arc), Maker Spaces (Open Works, Fast Forward U), and Social Impact Co-Working Spaces (Impact Hub) were instrumental in re-

aligning every team member’s understanding, with shared language and experiences, of how the facilities could work harder for the communities through facilitation and activation.

Qualitative Analyses

Collectively, our team is expert at synthesizing complex data to reveal themes that are the clear inputs that drive the vision. This work starts with organizing the data in a meaningful and systematic way and can be strengthened with strategic frameworks that organize the information into goals, including social frameworks (affordable housing, food justice, child-care, transportation, etc.), experiential frameworks (educational, social, workforce, cultural, etc.), and operational frameworks (collections, technologies, partnerships, and staff skills and talents).

Resulting in clear themes of need, alignments, opportunities, and pattern of communities, human behaviors, and individual’s common aspirations, these data sets will inform the exciting parts of this work: Envisioning the Future! Armed with evidence, educated with possibilities, the strategic framework and re-imagined SFPL service model for a bold vision will emerge in Phase III, and the services will be designed to “test” and operationalize this vision in Phase IV.

Quantitative Analyses

Quantitative data will be analyzed in multiple ways. The survey data will be analyzed and described with descriptive statistics. Document audit and interview data will be categorized into themes and described according to communications, equity, and inclusion barriers. Branch utilization metrics such as circulation data, door counts, wifi or computer usage, as well as active cardholders will serve to capture existing strengths and weakness, and reflect bright spots or pattern shifts. Existing service locations may be overlaid on other community development parameters such as demographics, anticipated growth, or areas of investment. These maps serve as a strong foundation to determine future growth opportunities, and align future typologies in a data driven way.

Question 6: Work Approach Quality and Appeal Continued

Presentations

Our team will look forward to presenting this bold vision in support of its successful implementation to boards, staff, community members, City leaders, and community partners. Our report deliverables will be provided at milestone phases in digital formats, as outlined in our deliverable schedule. Presentation and report documents will be provided in a graphically compelling and clear way, with clear documentation of process and inputs to support transparency and clarity in communications. Presentation of content will be done by a mix of in-person and virtual participation with travel as required by non-local team members.

Question 7: Work Approach Problem Solving (5 Points): Proposer must describe their understanding of potential project/task issues and constraints and approach to encouraging diverse, robust participation, including participation from disadvantaged and traditionally hard-to-reach communities.

Proposer Response

It is critical to ensure diverse and robust participation especially for disadvantaged and traditionally hard-to-reach communities. This is why we start with a community scan and the identification of trusted community organizations, which includes developing working partnerships with them in a formal way. These will be selected based on their ability to engage traditionally hard to reach communities. This strategy helps to mitigate the issue of many people not being or feeling meaningfully engaged, as those helping to facilitate the engagement will be trusted partners.

Our approach is built on creative problem solving, sitting at the intersection of deep and broad experience, nimble and adaptive response, and a learning and empathetic mindset.

The engagement approach will start with community building exercises designed to establish an environment of shared knowledge construction as it relates to racial equity, diversity and inclusion. This will reframe the conversation and understandings regarding racial equity and how race has historically disproportionately impacted certain groups. Most important to this process is a shift away from individualistic understandings of inequity and access towards an analysis that considers historical patterns of devaluation/hyper-valuation that impact groups categorically.

Building a sense of shared understanding of concepts and norms will allow us to draw connections between our collective socialization toward “difference” and the consequences of the patterns of miscomprehension. We will work to expand our collective capacity to hold the complexity of these issues, incorporating some untaught history if needed to pull in macro and local context.

Moreover, the research conducted on this project will ensure statistically reliable results across all eleven supervisorial districts, including representation from each library branch and the Main. The outreach and research materials will be available in multiple languages – English, Spanish, Chinese, and Filipino. Patron surveys will be designed to be brief with multiple options for completion, including in-person, self-administered, or online. Minimum sample sizes will be established to ensure that disadvantaged, and traditionally hard-to-reach communities, are well represented. Our experience conducting this type of work in San Francisco is extensive, having completed community research projects for SF Library, SF Department of the Environment, the SF Municipal Transportation Agency, and the SF Controller’s Office.

This Team has been leading the library and planning industry in deepening community engagement to reach community members who often are not able to participate in “conventional” community engagement methods. We will engage in multiple techniques to invite and cultivate participation. Below are examples of effective techniques our team has employed.

1. We are from these communities. Contigo Communications owner and principal Susana Razo was born and raised in San Francisco. Others on the Contigo team also have deep roots in San Francisco and serve on San Francisco nonprofit boards and commissions, as well as a neighborhood association. This level of knowledge, particularly working with nonprofit boards that serve low-income, diverse and disabled community members gives us many insights into San Francisco micro-communities.

Question 7: Work Approach Problem Solving Continued

Proposer Response

2. We know we must engage with trusted community leaders to reach the populations that may not have a trusted relationship with the library- yet. This has been successful by working with trusted political leaders in Black and Latinx communities in Cleveland, Ohio; Wilmington, Delaware; Omaha, Nebraska; and Las Vegas, Nevada and the San Francisco Bay Area. This approach builds engagement, fosters trust, and cultivates future library users.
3. We must engage with community-based organizations that represent the constituents that we want to reach. Using this approach in Madison, Wisconsin; Prince George's County, Maryland, Anne Arundel County, Maryland; New Haven, Connecticut, and Hartford, Connecticut, MSS and Gensler have found more successful outcomes. These groups are also another avenue to more efficient direct connection to these organization's community members.
4. We must meet them where they are. Our local nonprofit partners will help to guide us to those locations. One of the best ways to meet community members where they are is by going to the schools and community centers. This tactic worked in Pleasant Hill, California, and Stockton, California, where the under-represented communities and their families were not attending any of the planned community meetings, but were loyal users of the community centers.
5. We must speak their language. We must engage the entire community. The research conducted on this project will ensure statistically reliable results across all eleven supervisorial districts, including representation from each library branch and the Main. The outreach and research materials will be available in multiple languages – English, Spanish, Chinese, and Tagalog. Other languages if needed will be identified during the outreach planning process with SFPL and confirmed with community nonprofit partners. Patron surveys will be designed to be brief with multiple options for completion, including in-person, self-administered, or online. Minimum sample sizes will be established to ensure that disadvantaged, and traditionally hard-to-reach communities, are well represented. Our experience conducting this type of work in San Francisco is extensive, having completed community research projects for SF Library, SF Department of the Environment, the SF Municipal Transportation Agency, and the SF Controller's Office.

Question 8: Work Approach Adversarial or Difficult Situations (5 Points): Approach and procedures for contending with the public in adversarial or difficult situations while producing high-quality deliverables

Proposer Response

We expect for there to be tension in our discussions at times as people walk with their unique life experiences, which vary widely. It is not our intention to negate people's experiences, but to create an environment and discussion where differences are heard and understood for the complexity they hold. We will design interactive exercises and discussion that shift people away from individualistic understandings of inequity and access towards an analysis that considers historical patterns of devaluation/hyper-valuation that impact groups categorically. Libraries need to serve whole communities and groups and not just individuals, so this will be reflected in how we contextualize the planning process.

We have tools and techniques for behavior dynamics.

Our team will:

- Strategize with the partners/ libraries ahead of time to anticipate adversarial situations. Often, we find this can be situational, and scenario planning is critical.
- Give space for ideas to be contributed with skilled facilitation and engagement designed to lifting up the voices of all participants, particularly those from historically underrepresented groups.
- Co-create with the community. We will encourage small group and constructive engagement with a variety of platforms, applying best practices of meaningful engagement strategies.
- Employ an Asset-Based approach. By starting with focusing on the strengths of the City, the strengths of the people, and the strengths of the library, our team will set a positive tone for the gathering.
- Inspire with Conscious Leadership and a Bold Vision. When library and community leaders attend and present at these sessions, they can set a positive tone by inspiring with a bold vision, communicating expectations, inviting constructive participation, and genuinely listening.
- Educate that the role of the public library is a both/and model. Folks are often nostalgic about libraries and will often come to these meetings thinking they will "lose" something- conversations and workshops can be planned to ensure that they will continue to enjoy their relationship with the library and invite them to be a valuable contributor to the future for all of their fellow community members.

Contigo's Susana Razo, together with facilitator and racial equity consultant Milton Reynolds, have demonstrated great success in managing difficult projects. Mr. Reynold's worked with Antioch Unified School District (AUSD) after the ACLU of Northern California conducted a successful litigation process against AUSD for gross racial disparities in disciplinary suspensions and expulsions. Furthermore, the district was mandated to engage in three years of equity and inclusion, school climate work that was to include district administration, teaching staff and some selected classified staff that had direct contact with students.

Both Mr. Reynolds and Ms. Razo worked with Oakland Unified School District (OUSD) and provided strategic communications, messaging, community outreach, meeting preparation and facilitation support services to OUSD and the District's newly formed Surplus Property 7-11 Committee ("7-11 Committee") comprised of volunteer local residents, community organizers, non-profit leaders, union teachers, parents and others with specialties in

Question 8: Work Approach Adversarial or Difficult Situations Continued

Proposer Response

real estate, education, non-profit organizations and local government. The committee was tasked with reviewing five properties and making recommendations to the School Board as to whether the properties were no longer needed for instructional uses and considered as surplus property. These properties were located throughout the District, including two in East Oakland. The Committee's process was successfully supported resulting in clear recommendations to the Board about which properties could be surplus and which could be retained for community and education aluses, all during a time when Board meetings were often shut down due to controversy on other School District matters.

As another example, for public Meetings, people consistently show up adversarial. We take care to ensure our public presentations encompass a statistically reliable cross representation of residents. Our outreach and research plan will be clearly developed and transparent to both library staff/management and to any other interested parties. We have experience presenting public facing, data-based findings, for numerous agencies including: the SF Public Library, SF Paratransit, SFO, the Metropolitan Transportation Commission, and others. This experience will allow us to deliver and defend the strategic plan findings from this project effectively and efficiently.

These successes are reflective of the combination of "art and science" of community engagement that combines meaningful listening and engagement with the historical frameworks and insights of several decades of racial equity work. With a team that teaches organizations conflict resolution techniques and racial equity training, we are confident that we will create the conditions for all participants to feel valued. Tensions aren't always negative. The team has applied techniques that use the tensions to deepen community conversations and facilitate folks to hold tension with each other around complex issues as they work towards shared vision-making that addresses collective needs.

Our community' engagement work with SFPL will not only be successful, but also visionary, thought-provoking and meaningful as it will help ensure library resources are designed to better serve diverse residents that are often left out of planning processes and as such denied access to available resources. Our work designs positive experiences, and with intentional design, we demonstrate the benefit of engaging in the best practices for inclusion. We create the conditions for communities to flourish, whether with communities to envision the future library, or in the building design that vision informed. SFPL is a gift to all residents of San Francisco. Our team will honor that.

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