Cost Benefit Site Analysis

Marion Public Library

Charette Team Final Report

Prepared with the assistance of

Engberg Anderson
Milwaukee | Madison | Tucson | Chicago

Doug Raber, Ph.D.
Director, Marion Public Library
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Acknowledgements
Our thanks to the Charette Team for their thoughtful and energetic participation in this review process.

Jack Zumwalt (Library Trustee Representative)
Kevin Gertsen (Library Trustee Representative)
Joe Spinks (City Representative)
Lon Pluckhahn (City Representative)
Nick Glew (Director, Main Street Marion)
Jill Ackerman (CEO Marion Chamber of Commerce)
Kim Rose (Farmers State Bank)
Sarah Pinion (Superintendent, Marion Independent School District)
Karen Hoyt (Citizen and Library User)
Laura Farmer (Citizen and Library User)
Nancy Miller (Citizen, library user, honorary Library Trustee)

We also want to acknowledge the efforts of Doug Raber, Ph.D., Library Director and Lon Pluckhahn who in addition to participating as a member of the Charette Team, provided substantial assistance in assessing development potential of the sites studied.

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Executive Summary

In 2013 the Marion Public Library Board of Trustees began planning for a library facility that will meet the current and future library needs of the community. The Board created a Renovation & Expansion (R&E) Committee to address the City’s Imagine 8 Book It goal:

Raise additional funds, review library expansion options and proceed with an expansion of the library in public/private collaboration

With the assistance of the R&E Committee the Library Director, Doug Raber, prepared a Facility Needs Assessment. This assessment was based on a long-term planning perspective and a twenty-year time frame. Accordingly, the goal of the assessment was to determine how much and what kind of library space Marion would need in the year 2035. Based on the projected growth of Marion’s population and the Library’s service population the City will need a larger library facility by 2035 than the City can now build.

The Board determined to go forward with a facility project to address current needs, catch up with our peer cities, and provide a library capable of meeting future needs within a ten-year time frame. The average size of the public libraries serving Marion’s peer cities is 47,500 square feet. A library of this size is smaller than the Needs Assessment recommends for Marion’s 2035 service population but its construction is a realistic goal and it will adequately address current issues.

To date the Board of Trustees has made two planning decisions:

- To locate building project in Uptown, using land already designated for library use
- To plan for a branch facility on the north side of Marion after patterns of residential and commercial growth become clear

The R&E Committee also considered and identified a set of critical needed service features the library facility should have as well as the aesthetics of its look and feel. The Committee determined three possibilities regarding the site location of the facility based on available Uptown property:

- Renovation and expansion of the existing facility on the current site
- A new facility on the 11th St. parking lot, the 5th Ave lot acquired last year and the lot at 525 11ths St., recently acquired by the City
- A new facility using portions of both current site and 11th St. lot, and bridging over 11th St.

The R&E Committee determined that it had insufficient information to provide a recommendation to the Board and recommended that the Board engage a public library architect as a consultant to conduct a cost-benefit analysis of these options. The Board engaged Joe Huberty of Engberg Anderson for this purpose. Mr. Huberty was the lead design architect for the Iowa City Public Library expansion and renovation.
Site Location Evaluation
The Library Board of Trustees organized a planning team of Trustees, stakeholders, and citizens (the Charette Team) to work with Mr. Huberty. The Charette Team took seriously Imagine 8’s call for public/private collaboration. Three critical values guided the Charette Team’s work. Given necessary budget and site constraints:

- The City must have the best library possible—a facility with the best combination of initial size, expandability, functional efficiency, and adaptability
- The City must have a facility that contributes to Marion’s civic and economic development, based on innovative funding mechanisms and partnerships
- The City must have a building of aesthetic value that reflects Marion’s character and identity

The Charette Team considered multiple configurations of library expansion and commercial development. It carefully examined the available options with the goal of avoiding closing the library or moving to and renting temporary space during the construction. The Team identified five basic options; one would renovate and reuse the current building and four envisioned a new facility supported by mixed-use commercial development. For any mixed-use option, the Charette Team set four conditions:

- Mixed-use development options must be economically viable
- Verified developer interest must be determined before going forward
- The development must increase City taxable value and provide revenue for the increased operating expenses of larger library
- The library component must have the highest construction priority—it must be built first

Based on directions from the R&E Committee Mr. Huberty developed five basic options for the Charette Team to review. They vary in size from a low of 43,475 square feet to a high of 47,100 square feet. The estimated cost of each per square foot to varies from a low of $255 to a high of $276. The estimated total cost of each option is about $12 million.

A set of benefit evaluation criteria was identified and ranked by the Charette Team and applied to each option to determine its overall value. The score of each option is a measure of its value given its cost. Because all of the options have the same cost, the scores of each option are directly comparable.

During the evaluation process five local developers were contacted to assess preliminary interest. All five expressed positive interest in the project and all five advised against renovating and expanding the current site due to construction constraints and difficulties.

---

1 Ahmann Companies, Armstrong Development Company, C.D. Smith Construction, Genesis Equities, Knutson Construction, Mooney-Engle Land Company
The Charette Team arrived at a consensus on the following items:

- Reusing the current facility provides the least benefit for the estimated cost; of the five options evaluated by the Charette Team, renovating and expanding the existing site:
  - Has the lowest Total Performance Score – A measure of its overall cost-benefit value
  - Has the lowest Building Value Criteria score – A measure of its value as a library
  - Has the lowest Site Criteria Value score – A measure of the value of its location as library and economic development resource
  - Will require renting temporary space and closing the library to move before and after construction

- Options resulting in a new building provide more library and site benefits for the estimated cost than does renovation
  - They have higher performance and comparison evaluation scores
  - They are more cost-effective solutions to expansion than renovation

- Mixed-used projects including retail and residential development have the potential to provide significant community benefits
  - Synergy between library use and retail markets that increase the size and value of both
  - Economically viable use of high value Uptown property
  - Achievement of the Main Street Marion goal of walk-around-the-square commerce centered on City Square Park
  - Increased taxable value and property tax revenue that will fund increases in library operating expenses required by a larger facility and staff
  - Creation of an urban living center characterized by density, walkability, and concentrated amenities, services, and cultural experiences

- Developer interest and commitment must be assessed before a final decision about the direction of Library expansion can be made

Marion needs an adaptable library designed for 21st century library services and uses that can efficiently respond to changing technologies and user needs over the next twenty years. The Charette Team concluded that a mixed-use facility is an option worth exploring, but recognizes that moving forward with a mixed-use option depends on developer commitment. It recommended the preparation and issuance of a Request for Qualifications (RFQ) to determine developer interest and solicit preliminary plans.
## Site Option Cost Models

<table>
<thead>
<tr>
<th></th>
<th>3 New Facility on 11th St Parking Lot</th>
<th>2 Repurpose Existing &amp; Expand over 11th St</th>
<th>2A Replace Existing &amp; Expand over 11th St</th>
<th>1 Expand &amp; Renovate Existing</th>
<th>1A New Facility on Existing Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area (sf)</td>
<td>47,100</td>
<td>43,550</td>
<td>44,300</td>
<td>43,475</td>
<td>45,000</td>
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<td>Fixed Project Budget ($)</td>
<td>$12,000,000</td>
<td>$12,000,000</td>
<td>$12,000,000</td>
<td>$12,000,000</td>
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<tr>
<td>Cost /square foot ($)</td>
<td>$255</td>
<td>$276</td>
<td>$271</td>
<td>$276</td>
<td>$267</td>
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<td>Cost to build 47,000 sf ($)</td>
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<td>$12,731,000</td>
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<td>Existing Reused as Library</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>17,500</td>
<td>-</td>
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<tr>
<td>New Building Area (sf)</td>
<td>47,100</td>
<td>43,550</td>
<td>44,300</td>
<td>25,975</td>
<td>45,000</td>
</tr>
<tr>
<td>Total Building Area (sf)</td>
<td>47,100</td>
<td>43,550</td>
<td>44,300</td>
<td>43,475</td>
<td>45,000</td>
</tr>
<tr>
<td>Increase over Existing (sf)</td>
<td>22,600</td>
<td>19,050</td>
<td>19,800</td>
<td>18,975</td>
<td>20,500</td>
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<tr>
<td>Increase over Existing (%)</td>
<td>92%</td>
<td>78%</td>
<td>81%</td>
<td>77%</td>
<td>84%</td>
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### Cost Component

<table>
<thead>
<tr>
<th></th>
<th>3 Building ($)</th>
<th>2 Furnishings &amp; Technology ($)</th>
<th>2A Parking ($)</th>
<th>1 Other Site Development ($)</th>
<th>1 Site Acquisition, Net ($)</th>
<th>1 Implementation ($)</th>
<th>1 Expenses ($)</th>
<th>1A Total Cost ($)</th>
<th>1A Cost /sf ($)</th>
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</thead>
<tbody>
<tr>
<td>Building ($)</td>
<td>$8,487,673</td>
<td>$8,355,937</td>
<td>$8,279,754</td>
<td>$8,415,005</td>
<td>$8,378,769</td>
<td>$10,4816</td>
<td>$965,839</td>
<td>$11,997,008</td>
<td>$254.71</td>
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<td>Furnishings &amp; Technology</td>
<td>$1,798,056</td>
<td>$1,669,069</td>
<td>$1,697,813</td>
<td>$1,640,836</td>
<td>$1,669,327</td>
<td>$280,598</td>
<td>$962,744</td>
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<td>Parking</td>
<td>$108,942</td>
<td>$208,809</td>
<td>$213,759</td>
<td>$149,691</td>
<td>$148,323</td>
<td>$329,922</td>
<td>$962,315</td>
<td>$12,004,186</td>
<td>$270.97</td>
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<td>Other Site Development</td>
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<td>$525,413</td>
<td>$520,622</td>
<td>$544,109</td>
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<td>$198,542</td>
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<td>Site Acquisition, Net</td>
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<td>$0</td>
<td>$0</td>
<td>$0</td>
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<td>$0</td>
<td>$1,047,640</td>
<td>$266.66</td>
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<td>Implementation</td>
<td>$104,816</td>
<td>$280,598</td>
<td>$329,922</td>
<td>$198,542</td>
<td>$198,542</td>
<td>$0</td>
<td>$0</td>
<td>$11,999,838</td>
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<tr>
<td>Expenses</td>
<td>$965,839</td>
<td>$962,744</td>
<td>$962,315</td>
<td>$1,047,760</td>
<td>$1,047,640</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td><strong>Total Cost</strong></td>
<td><strong>$11,997,008</strong></td>
<td><strong>$12,002,570</strong></td>
<td><strong>$12,004,186</strong></td>
<td><strong>$11,995,943</strong></td>
<td><strong>$11,999,838</strong></td>
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<td><strong>0</strong></td>
<td><strong>0</strong></td>
<td><strong>0</strong></td>
</tr>
<tr>
<td><strong>Cost /sf</strong></td>
<td><strong>$254.71</strong></td>
<td><strong>$275.60</strong></td>
<td><strong>$270.97</strong></td>
<td><strong>$275.93</strong></td>
<td><strong>$266.66</strong></td>
<td><strong>0</strong></td>
<td><strong>0</strong></td>
<td><strong>0</strong></td>
<td><strong>0</strong></td>
</tr>
</tbody>
</table>

### Limitations on the Cost Models

It is important to recognize that each model is a concept level opinion of probable cost. Many decisions regarding material selection, system development and project parameters have yet to be defined. Market conditions, as always, are beyond the control of the architect or estimator and will vary over time. No guarantee is given or implied that costs will not vary from these models. It is imperative that additional estimates are prepared as the project is developed to ensure conformance with project budgets.
## Site Option Performance Evaluation & Comparison Scores

<table>
<thead>
<tr>
<th>Importance Factor</th>
<th>3 New Facility on 11th St Parking Lot</th>
<th>2 Repurpose Existing &amp; Expand over 11th St</th>
<th>2A Replace Existing &amp; Expand over 11th St</th>
<th>1 Expand &amp; Renovate Existing</th>
<th>1A New Facility on Existing Site</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Building Criteria</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Size – Initial</td>
<td>10</td>
<td>11.02</td>
<td>10.19</td>
<td>10.36</td>
<td>10.17</td>
</tr>
<tr>
<td>Size – Future</td>
<td>9</td>
<td>9.00</td>
<td>9.00</td>
<td>9.00</td>
<td>9.00</td>
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<tr>
<td>Function – Efficient Plan</td>
<td>8</td>
<td>6.90</td>
<td>6.75</td>
<td>7.83</td>
<td>7.11</td>
</tr>
<tr>
<td>Function – Adaptability</td>
<td>7</td>
<td>6.82</td>
<td>6.60</td>
<td>6.73</td>
<td>2.73</td>
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<tr>
<td><strong>Total - Building Criteria</strong></td>
<td>33.74</td>
<td>32.54</td>
<td>33.92</td>
<td>29.01</td>
<td>34.83</td>
</tr>
<tr>
<td><strong>Comparison Score</strong></td>
<td>97</td>
<td>93</td>
<td>97</td>
<td>83</td>
<td>100</td>
</tr>
</tbody>
</table>

| **Site Criteria** | | | | | |
| Context & Synergies | 6 | 3.87 | 5.51 | 6.00 | 1.09 | 5.44 |
| Identity | 5 | 4.25 | 3.88 | 5.00 | 3.36 | 2.52 |
| Control | 4 | 4.00 | 4.00 | 4.00 | 4.00 | 4.00 |
| Access | 3 | 0.75 | 1.58 | 1.66 | 3.00 | 2.94 |
| Amenities | 2 | 1.50 | 2.00 | 2.00 | 1.50 | 1.00 |
| Other Attributes | 1 | 0.00 | 1.00 | 1.00 | 0.00 | 0.00 |
| **Total - Site Criteria** | 14.37 | 17.97 | 19.66 | 12.95 | 15.9 |
| **Comparison Score** | 73 | 91 | 100 | 66 | 81 |

**TOTAL**

| Performance Score | 48.1 | 50.5 | **53.1** | 42.0 | 50.4 |
| Comparison Score | 91 | 95 | **100** | 79 | 95 |
Introduction

The Marion Public Library, in seeking to further its ability to meet the service needs of its users, has undertaken significant planning toward the expansion of its physical plant. This expansion may take the form of a renovation and expansion of the current building, partial replacement and expansion of the current facility or replacement of the current facility on or near the current site in Uptown Marion. The purpose of this study is to compare the various site concepts and identify the strategy that will best meet the long range needs of the community in a cost effective manner.

Background

In February 2013, the Board of Trustees created an ad hoc Renovation & Expansion (R&E) Committee with the following charge:

The committee will determine current and future library facility needs and oversee the management of the MPL building renovation and expansion.

In addition to the library director, Doug Raber, Committee membership included Library Trustees and community stakeholders:

- Library Board Representatives:
  - Jack Zumwalt, John Clemens, Kevin Gertsen, Sally Reck, Nancy Miller
- Friends Representative: Bob Hoyt
- Foundation Representative: John Huntington
- City Council Representative: Cody Crawford
- Citizen Representatives:
  - Kyle Martin (Martin Gardner Architecture)
  - Nick Glew (Director, Marin Street Marion)
  - Katie Mulholland (Superintendent, Linn-Mar School District)
  - Sarah Pinion (Superintendent, Marion Independent School District)

Throughout 2013, the R&E Committee worked with the library director to identify Marion’s library service needs, current facility effectiveness issues, optimal critical features of a renovated or new facility, and the required look and feel of a renovated or new facility. The final outcome of that work was a formal assessment based on a twenty year planning horizon and that asks the question; what kind of library and of what size will Marion need in 2035? (Facility Needs Assessment: Marion Public Library, May 9, 2014). This document is accessible on the Library’s Website at:


- The following highlights of the needs assessment are critical factors leading to the charrette process:
  - By 2035 Marion’s population is conservatively estimated to be approximately 55,000.
  - By 2035 the Library’s service population is estimated to be a little over 100,000.
  - MPL’s current building size ranks last among libraries of Marion’s peer cities
    - Peer city average library size = 47,591 square feet
- MPL size = 24,500 square feet
- Current space deficit = 23,091 square feet

- Standard library building guides indicate that Marion will need between 75,000 and 90,000 square feet to cope with its service population by 2035.

Based on cost considerations, the R&E Committee’s input, the library director’s recommendation, and the its commitment to keeping the library in the Uptown District, the Board of Trustees determined that it is not feasible at this time to build a facility for Marion’s 2035 needs and that a stepwise strategy is the best course. The Board of Trustees determined:

- To go forward with a facility project to address current needs, catch up with our peer cities, and provide a library capable of meeting medium-term future needs within a ten year time frame.
- To locate this project in Uptown, using land already designated for library use.
- To plan for a branch facility on the north side of Marion after patterns of residential and commercial growth become clear.

In addition to providing input for the final Needs Assessment, the R&E committee identified three options for expansion based on available Uptown sites:

- Renovation and expansion of the existing facility on the current site
- A new facility on the 11th St. parking lot, the 5th Ave lot acquired last year and the lot at 525 11ths St., recently acquired by the City
- A new facility using portions of both current site and 11th St. lot, and bridging over 11th St.

The R&E Committee did not seek to determine the use of the current site given the last two options. It considered the possibility of selling the building and lot and applying the proceeds to new construction as a means of realizing value from the current site and reducing the amount needed to finance the project.

The Committee concluded that it did not have enough information to make a recommendation to the Board regarding the three options for expansion. It determined that in order to go forward the costs and benefits of each option needed to be identified. It recommended that the Library Board engage a public library specialist architect as a consultant to conduct a cost/benefit analysis of the alternative sites and provide advice to the Board.

The Board hired Joe Huberty of Engberg Anderson Architects as a project consultant to conduct the site location study and cost-benefit analysis. Mr. Huberty was the lead design architect for the Iowa City Public Library (ICPL) renovation and expansion project and was highly recommended by Susan Craig, director of the ICPL. Mr. Huberty proposed the formation of a Charette Team and a charette process to evaluate the costs and benefits of each site location option and provide input and data he needed for the analysis.
Charettes

In April and May Mr. Huberty conducted three fact finding and evaluation charettes to quantify and compare the value of the renovation and expansion site location options, and if possible, provide a recommendation to the Board.

Charettes are collaborative work sessions in which a diverse group of people come together to identify solutions to a design problem. The goal of charette is to generate wide-open discussion and new ideas.

The Board identified and recruited sixteen people to be members of the Charette Team. For continuity, some of those invited had served on the R&E committee, but the Board deliberately sought out new participants in order to get fresh perspectives. Of the sixteen people recruited, eleven were able to attend at least one meeting; nine people attended all three meetings. In addition to the library director, Doug Raber, the Charette Team included Trustees, stakeholders and library users:

- Library Trustee Representatives:
  - Jack Zumwalt, Kevin Gertsen
- City Representatives:
  - Joe Spinks, Lon Pluckhahn
- Stakeholder Representatives:
  - Nick Glew (Director, Main Street Marion)
  - Jill Ackerman (CEO Marion Chamber of Commerce)
  - Kim Rose (Farmers State Bank)
  - Sarah Pinion (Superintendent, Marion Independent School District)
  - Karen Hoyt (Citizen and Library User)
  - Laura Farmer (Citizen and Library User)
  - Nancy Miller (Citizen, library user, honorary Library Trustee)

On the advice of Mr. Huberty, the Charette Team was charged by the Board of Trustees to:

- Establish site option evaluation measures and rank them in order of importance to the value of the project
- Gather qualitative assessment of site location options
- Gather quantitative data regarding site location options according to the evaluation measures
- Quantify and compare the measured valued of the site location options (cost-benefit analysis)
- Provide a recommendation on the preferred site location option in light of the cost-benefit analysis and qualitative assessments

Many thanks are owed to the members of the Team who participated with enthusiasm, offered a wide range of opinions and ideas, and provided rigorous analysis for each of the concepts studied. Their efforts defined the success of the study.

We also want to acknowledge the efforts of Doug Raber, Ph.D., Library Director and Lon Pluckhahn, City Manager, who in addition to participating as a member of the Charette Team, provided substantial assistance in assessing development potential of the sites studied.
Process
Each charrette is envisioned as a collaborative working session to identify a comparison process, consider options for each site concept, identify assets, liabilities, and questions associated with the multiple variations for each concept, and make recommendations to the Library Board as to the best course of action. In the course of these efforts the Charette team sought to

- Confirm the parameters within which a solution must be found; creating a series of viable options;
- Applying a systematic set of measures to evaluate those options; and
- Progressively developing the best solution to the particular needs of the community
- Arrive at a consensus and communicate how that consensus was reached.

Of key importance in the process was the work previously completed by the Library and the variety of contributing committees and individuals. Most applicable to this has been:

- Existing Planning Documents
  The Needs Assessment, (revised April 2014, posted to the Library Webpage, May 2014) will be the basis for the programmatic evaluation of the various options.

- Budget Planning Efforts
  A probable project budget of budget of $12,000,000 has been identified in early discussions. This is inclusive of hard construction, contingency, fees and miscellaneous expenses. Verification of this range and what can be achieved within such parameters is part of the study goals.

Scope
The specific topics to be addressed as part of the study include:

**Size options—how much to build now to meet needs, to meet budget**
Costs and benefits of site options, including non-monetary costs and benefits

- Service implications
- Staffing implications
- Operational costs
- Political implications
- Capital costs
- Likelihood of needing temporary location

**Fit Within a Broader Service Plan**
Feasibility of branch plan

- How many will be served, now, future, probable timeline
- Size needed for above
- Capital and operational expenses
- Quality of library experience/ level of service/ range of services
- Relation to the YMCA’s Function and Fitness Center project
Funding Strategies
- Preparing for 2015 Library Levy
- Preparing for 2015 Bond Issue
- Use of Tax Increment Financing (TIF) Bonding—implications for design options
- Potential for public/private partnerships

Site Options to be studied
There are three concepts to be evaluated that are defined largely by their related but distinctly different site boundaries. These boundaries will need to be defined early in the study. Within each concept are potential variations that will examine the ability of the site to support other or additional (mixed) uses and determine which variation is in the best interests of the library, the city and the community at large.

- Stay on current lot, expand and renovate
- Renovate current facility and expand over 11th Street and 11th Street parking lot
- New facility in 11th Street parking lot
Fit Within a Broader Service Plan

We start with the broadest set of conditions. The long range strategic needs of the library in its efforts to serve the community are the framework for the more detailed evaluations. The overall space needs as defined in the Needs Assessment, dated February 17, identify a minimum need of at least 85,000 gross square feet of space and perhaps as much as 104,000 gross square feet. Many factors go into determining the exact size, much of which is community specific. The process used to arrive at these figures is described in detail in the Needs Assessment.

Defining a Facility Plan

There are many communities that provide this much space in a single facility. Other communities opt for other physical arrangements of the aggregate space. The factors that go into making the determination to support multiple facilities often include physical distance or travel time to the main library, man-made or geographic barriers to the main library, or provision of service to a targeted population. It is best to consider a wide range of factors in making this decision.

- **Strength of overall library program:** The library system's ability to provide funding, collections, staffing, core service programs to meet the need of the community through a single/main facility. If all of the service objectives can be accomplished in a single, easily accessible, functional and attractive facility, and there are no other circumstances creating a need for a second facility, the library will eliminate all of the expenses associated with the operation of the second facility.

- **Access:** The ability of the public to reach the main library in 15 or 20 minutes driving time. Convenient easy access is essential in maximizing the use of a facility. Significant physical barriers that increase the travel time or perception of travel time beyond what is generally perceived as acceptable will limit utilization of the facility.

- **Availability of other library resources in the area:** Other sources of library resources that may be accessed by those a branch would be intended to serve. Proximity, and fit of the other service to the needs of the customer are important factors in deciding which of multiple venues gets the visit. This later one is important. In many instances a closer facility of limited resource may see less use that a facility at greater distance that offers a higher level of service.

- **Capital and operational funding:** The ability of the library entity to carry the operational and capital levies need to build and operate the branch. Resources must match needs. Libraries that open branches that have limited hours and limited services may, at the expense of the central resource or of all the facilities, trade some form of convenience for quality of library experience. Operational funding needs to be assured over the long term to warrant an investment in a physical facility.
• **Projected utilization of the proposed branch:** A branch should circulate enough items so that the cost per loan at the branch is similar to that of the main library.

• **Targeted service population:** The existence of a special population that, by socio-economic characteristics, warrants a special level of library service.

In the case of Marion, the primary goal is to keep open an option that makes library services convenient and meaningful in what is expected to be two geographically distinct and different areas of the expanding City. Growth to the north is anticipated to be primarily residential and continue at a significant rate over the next twenty years. A large population is envisioned as needing a convenient family centered library with a full range of typical services. The current uptown and surrounding areas are seen as developing greater density in both residential and commercial land uses. The growth will need to support the same family focused services as a north facility and serve the needs of the business community, serve as a cultural anchor to uptown, be a major activity and programming center and support the entire system with central services such as administration, materials processing, and information technology support.

Within the population projections defined by the Needs Assessment, the relevant strengths, weaknesses, and opportunities are best illustrated through a series of Facility Plan options.
### Facility Plan Concepts

<table>
<thead>
<tr>
<th>Concept 1</th>
<th><strong>One Library in Uptown</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strengths</strong></td>
<td><strong>Weaknesses</strong></td>
</tr>
<tr>
<td>Same library experience for all</td>
<td>Very large building - out of scale with uptown and out of scale with Marion’s image for itself</td>
</tr>
<tr>
<td>Cross over exposure to other services</td>
<td>Travel times form north end of City - potential for northern residents to lose connection with broader Marion community and start using neighboring facilities, followed by shopping, etc.</td>
</tr>
<tr>
<td>High volume of visitors to Uptown</td>
<td></td>
</tr>
<tr>
<td>Use of library reinforces connection of northern residents to older areas of the City</td>
<td></td>
</tr>
<tr>
<td>Lowest cost to construct</td>
<td></td>
</tr>
<tr>
<td>Can work at it incrementally</td>
<td></td>
</tr>
<tr>
<td>Lowest cost to operate</td>
<td></td>
</tr>
<tr>
<td>Support mixed-use potential</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Concept 2</th>
<th><strong>One Library somewhere toward the north</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strengths</strong></td>
<td><strong>Weaknesses</strong></td>
</tr>
<tr>
<td>Same library experience for all</td>
<td>Does not support Uptown, missing an opportunity to drive/reinforce investments in the area</td>
</tr>
<tr>
<td>Cross over exposure to other services</td>
<td>supporting economic development and maintain vitality of an area that helps differentiate Marion.</td>
</tr>
<tr>
<td>Equally convenient to all areas of City</td>
<td></td>
</tr>
<tr>
<td>Lowest cost to construct</td>
<td></td>
</tr>
<tr>
<td>Can work at it incrementally</td>
<td></td>
</tr>
<tr>
<td>Lowest cost to operate</td>
<td></td>
</tr>
<tr>
<td>Very large building could be developed with appropriate buffers</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Concept 3</th>
<th><strong>Keep / Replace Existing as Full Service Uptown Branch,</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strengths</strong></td>
<td><strong>Weaknesses</strong></td>
</tr>
<tr>
<td>Costly now - requires renovation/replacement of existing and construction</td>
<td></td>
</tr>
<tr>
<td>Strengths</td>
<td>Weaknesses</td>
</tr>
<tr>
<td>-----------</td>
<td>------------</td>
</tr>
<tr>
<td><strong>Build new Main to north</strong></td>
<td>of new to meet even basic needs.</td>
</tr>
<tr>
<td></td>
<td>▪ Cost of land acquisition</td>
</tr>
<tr>
<td></td>
<td>▪ An uptown branch is not necessarily a destination. Unless it has features beyond the typical branch, it does not support Uptown, missing an opportunity to drive/reinforce investments in the area supporting economic development and maintain vitality of an area that helps differentiate Marion.</td>
</tr>
<tr>
<td></td>
<td>▪ Multiple facilities are more expensive to construct, operate and maintain.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Concept 4</th>
<th>Cross over exposure to other services</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Expand /Replace Existing as Main, build Full Service Branch to north</strong></td>
<td>High volume of visitors to Uptown</td>
</tr>
<tr>
<td></td>
<td>Use of library reinforces connection of northern residents to older areas of the City</td>
</tr>
<tr>
<td></td>
<td>Can develop facilities incrementally</td>
</tr>
<tr>
<td></td>
<td>Multiple facilities are more expensive to construct, operate and maintain.</td>
</tr>
<tr>
<td></td>
<td>Requires planning now to identify site, partnering potential in advance of actual implementation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Concept 5</th>
<th>Cross over exposure to other services</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Expand Replace Existing as Uptown Regional Branch, build new North Regional Branch</strong></td>
<td>High volume of visitors to Uptown</td>
</tr>
<tr>
<td></td>
<td>Use of library reinforces connection of northern</td>
</tr>
<tr>
<td></td>
<td>Multiple facilities are more expensive to construct, operate and maintain.</td>
</tr>
<tr>
<td></td>
<td>Opportunity to develop joint use facility with neighboring communities</td>
</tr>
</tbody>
</table>
Strengths | Weaknesses
--- | ---
- residents to older areas of the City  | - Requires planning now to identify site, partnering potential in advance of actual implementation  
- Can develop facilities incrementally  |  |

**Recommended Facility Concept**

Concepts 4 and 5, really variations on the same approach, offer the greatest flexibility for the City to adapt to the future that evolves. This is important if the pace of development changes. The branch to the north could begin small as part of the YMCA project, or as a leased store front, before developing into a significant branch or regional Resource Branch. The key to maintaining the flexibility is to have land that could be sold if not needed rather than to settle for remnants after the need develops.

This flexibility is enhanced if the uptown site and any new construction, allows further expansion. Such capability could keep open the potential for a single uptown facility should the priorities, resources, expectations of the community drive such a preference.

**Minimum Area Requirements**

In the Option 4 and 5 Facility Plan the Uptown facility must be at least 42,750 sf to be viable. This represents something less than doubling the current 24,000 sf of the current facility, makes a significant dent in a critical space shortage, and brings the library close to the average of its peer group, 47,000 sf. A more complete discussion of peer libraries and their sizes can be found in the Needs Assessment. Anything less will limit the library's ability to provide the quantity and quality of space needed.

To keep the Option 1 facility plan open, the Uptown site would ideally support something on the order of 85,000 square feet. The extent to which the various Site Concepts meet this future expansion goal, determine the library's ability to keep Option 1 viable.
**Library Branch Typologies**

The characteristics, construction costs and operating expenses of the various branch configurations have not been detailed as part of this study. Generalized models to provide an illustration of the expenses likely. the exact from of the service can be tuned as the library and community evolve.

| Full Service Branch  
Option 3 & 4 | Neighborhood Branch  
Option 3 & 4 | Storefront Branch  
Options 3 & 4 & Interim |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A branch library intended to provide most of the scope of services found at the main library, if not the depth. Common characteristics of a full service branch:</td>
<td>A branch library intended to support the popular, day to day service needs of a defined population. Common characteristics of a neighborhood branch:</td>
<td>A branch library intended to support the drop-in service needs of an on-the-go population. Common characteristics of a storefront branch:</td>
</tr>
<tr>
<td>▪ owned space of between 20,000 to 25,000 square feet</td>
<td>▪ leased or owned space of 5,000 to 10,000 square feet</td>
<td>▪ leased space of between 2,000 – 3,500 square feet</td>
</tr>
<tr>
<td>▪ collections of 45,000 to 60,000 print and non-print items</td>
<td>▪ collections of 15,000 to 25,000 items</td>
<td>▪ collections of 7,500 to 10,000 items</td>
</tr>
<tr>
<td>▪ 2 or in some cases 3 public service desks (by example: circulation, reference, youth)</td>
<td>▪ a single public service desk</td>
<td>▪ a single public service desk</td>
</tr>
<tr>
<td>▪ staff of 8 to 12 FTE</td>
<td>▪ staff of 4.0 to 6.0 FTE</td>
<td>▪ staff of 4.0 to 5.0 FTE</td>
</tr>
<tr>
<td>▪ specialized staff such as reference and children’s librarians</td>
<td>▪ staff expertise targeted to reflect the branch’s mission and scope</td>
<td>▪ staff expertise targeted to reflect the branch’s mission and scope</td>
</tr>
<tr>
<td>▪ a full programming schedule supported by branch staff</td>
<td>▪ programming supported by branch and main library staff</td>
<td>▪ open-floor programming supported by branch and main library staff</td>
</tr>
<tr>
<td>▪ meeting room(s) and other program spaces</td>
<td>▪ a meeting room</td>
<td>▪ limited collaborative space</td>
</tr>
<tr>
<td>▪ an annual operating budget of between $750,000 and $950,000</td>
<td>▪ an annual operating budget of between $400,000 and $585,000</td>
<td>▪ an annual operating budget of between $250,000 and $350,000</td>
</tr>
<tr>
<td>▪ construction and start-up costs of between $5.5M and $6.9M</td>
<td>▪ construction and start-up costs of between $1.4M and $2.75M for owned space, leased space $875,000 to $1.75M</td>
<td>▪ start-up costs for leased space of between $350,000 to $625,000</td>
</tr>
</tbody>
</table>
In the case of Marion, the Regional Resource Library concept would essentially have two fairly equal facilities. The emphasis of the services, and collections might differ and the attendant space needs/arrangements would follow such differentiation, but the concept is two buildings of approximately the same size, construction value, operational costs, and so on. The shared support functions of administration, centralized materials processing, IT support and the like could be gathered at a single site or allocated between the sites as pragmatic concerns about available space and staff synergies/efficiencies dictate.

There are non-building options that can be explored at the right time to extend the library’s reach/utility. These can include remote pick-up lockers, drop-off sites, vending devices and similar concepts. Some of these concepts have minimal capital and operational costs. They also have a limited focus - material delivery, which still a significant component of the overall service, is not the sole focus. Such concepts must be recognized and a convenience in the materials delivery game and not a replacement for a staffed facility.
Site Options Studied

Three concepts were identified to be evaluated. They are defined largely by their related but distinctly different site boundaries. These boundaries will need to be clarified as possible early in the study. Within each concept are potential variations that will examine the ability of the site to support other or additional (mixed) uses and determine which variation is in the best interests of the library, the city and the community at large. The initial options were:

- Option 1 - Stay on the current lot, expand and renovate
- Option 2 - Renovate the current facility and expand over 11th Street and 11th Street parking lot
- Option 3 - Build a new facility in 11th Street parking lot

Early on Option 1 was split to reflect the current site's value with and without its existing building. Similarly Option 2 was split into options that maintained and replaced the current facility. In the end, the options evaluated included:

- Option 1 - Stay on current lot, expand and renovate
- Option 1a - Stay on the current lot, replace the existing building
- Option 2 - Renovate the current facility and expand over 11th Street and 11th Street parking lot
- Option 2a - Replace the current building, Bridge across 11th Street, utilize the 11th Street parking lot
- Option 3 - Build a new facility in 11th Street parking lot
A Site Comparison System

As part of the process, the Charette Team utilized a Comparison System to evaluate the multiple site options and help determine which represented the best long term investment for the City in its efforts to provide high quality library service to the community.

The Comparison System is value based and looks to consider the possible performance of each site and the cost to achieve that level of performance. Performance is measured both as a library facility and as a contributor to the overall vitality of the city and the immediate neighborhood utilizing a series of Performance Criteria. A Cost Model to achieve that performance is considered as both capital and operational expense. These two aspects are related in a Value Index.

Cost Models

The anticipated costs to develop each site were prepared using baseline data generated by Construction Resource Management (CRM). These included typical and special site development costs, environmental costs, and associated overhead. Additional implementation expenses such as an interim library and moving, acquisition expenses, demolition, and relocations were calculated to provide a project cost. The major cost categories used in this study are:

**Building**
- Demolition
- Renovations
- New Construction

**Furnishings & Technology**

**Parking**
- Structure parking
- Surface parking

**Other Site Development**
- Utilities
- Earthwork
- Remediation
- General Site Improvements

**Site Acquisition**

**Implementation**
- Moving
- Interim Library: rent, network, restoration

**Expenses**

**Limitations on the Cost Models**

It is important to recognize that each model is a concept level opinion of probable cost. Many decisions regarding material selection, system development and project parameters have yet to be defined. Market conditions, as always, are beyond the control of the architect or estimator and will vary over time. No guarantee is given or implied that costs will not vary from these models. It is imperative that additional estimates are prepared as the project is developed to ensure conformance with project budgets.
Performance Criteria
The Performance Criteria are a bit more complex. The sites are evaluated using a series of weighted Evaluation Criteria. These criteria were developed from standard practice for library site comparison and the interest in defining long term growth strategies for the Uptown area.

- Decisions related to an expanded facility must be based on what provides the most economical and efficient option for the community in consideration of community needs;

Based on these considerations specific ‘Evaluation Criteria’ and their assigned ‘Importance Factor’ were developed. These Criteria followed the premise that true economy and efficiency derive from the building’s ability to support current and emerging trends in library service. Accordingly four of the top five evaluation criteria deemed most important are focused on identifying sites that will support a large, adaptable building that will stand the test of time.

Evaluation Criteria Summary

**Initial Size** ......................... Importance Factor 10
Will the building, programmed for minimum of 45,000 gross square feet (+/- to fit $12,000,000 budget), fit on the site, along with the parking, storm water and other site requirements, within the prescribed setbacks? How tight is all of this?

**Future Size** ......................... Importance Factor 9
Prudence dictates allowing for a 25% expansion of the facility at some point in the future to avoid outgrowing the site. Is there enough space for expansion of the building, its parking and the storm water detention components of the development?

**Functional Plan** ................. Importance Factor 8
Does the shape of the site and it topography allow the design of a simple, functional building? Does the site force the design to be irregularly shaped or oddly proportioned?

**Adaptability** ....................... Importance Factor 7
Can the building readily support changes in library use patterns?

**Context\Synergies** ............... Importance Factor 6
Who are the neighbors? Is the surrounding land use and development consistent with the function and image desired by the library and community for this facility? Can the adjacent developments further the mission of the Library in the community? Can the Library drive economic stability or growth by positive impacts on residential, commercial or residential development?

**Identity** .............................. Importance Factor 5
Does the site allow the library to create an image, physically and psychologically, that is in keeping with its mission and the values/attitudes of the community?

**Control** .............................. Importance Factor 4
Who controls the development adjacent to the Library? What can happen next door? Can some future development alter the Library’s enjoyment of the site?
Access .......................... Importance Factor 3
Is the site easily and safely arrived at from the various geographic regions of the district?
When you arrive at the site, is it easy to get to the building from sidewalks? From parking? From bike paths?

Amenities.......................... Importance Factor 2
Is there anything special about the site? Views?
Natural features? Are there opportunities to create a pleasant environment adjacent to the library?

Perception .......................... Importance Factor 1
When all is said and done, will the community be pleased with the results of the decisions?

Value Index

Each aspect of the ‘Evaluation Criteria’ will be divided into component factors with each factor being evaluated to determine its impact on the public’s ability to fully utilize the library. These individual component scores are combined into an aggregate ‘Evaluation Score’ (ES) for that ‘Evaluation Criteria’.

The ‘Evaluation Score’ is then weighted by the ‘Importance Factor’ (IF) to produce a ‘Performance Score’ (PS).

\[ ES \times IF = PS \]

The resulting ‘Performance Scores’ for each site are compared to the ‘Cost’ of Construction. The ratio of the ‘Performance Score’ to the cost of achieving that performance level defines a ‘Value Index’ (VI), a tool used to determine the best return on investment to the taxpayers of Marion.

\[ PS/$ - VI \]

A comparison of the ‘Value Index’ for each site is then made to the site with the highest ‘Value Index’ to provide perspective on how far from the top ranking option each of the other sites deviated. This is labeled ‘Comparison Score’ or CS in the evaluation summaries.

\[ CS = \frac{VI_{(site)}}{VI_{(max)}} \]

Because the project budget has been established at $12,000,000.00 the cost component becomes fixed and the Performance Score becomes the Value Index for each scheme. The analysis related the highest comparison Score to 100. The options can readily be compared in relation to the highest performing scheme. In the case of Marion the 5 options scored produced the following Comparison Scores:
## Performance Summary Table

<table>
<thead>
<tr>
<th></th>
<th>3</th>
<th>2a</th>
<th>2b</th>
<th>1a</th>
<th>1b (3)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Facility on 11th Street Parking Lot</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Area, SF</td>
<td>47,100</td>
<td>43,550</td>
<td>44,300</td>
<td>43,475</td>
<td>45,000</td>
</tr>
<tr>
<td>Cost</td>
<td>$12,000,000</td>
<td>$12,000,000</td>
<td>$12,000,000</td>
<td>$12,000,000</td>
<td>$12,000,000</td>
</tr>
<tr>
<td>$/SF</td>
<td>$255</td>
<td>$276</td>
<td>$271</td>
<td>$276</td>
<td>$267</td>
</tr>
<tr>
<td><strong>Comparison Score</strong></td>
<td><strong>91</strong></td>
<td><strong>95</strong></td>
<td><strong>100</strong></td>
<td><strong>79</strong></td>
<td><strong>95</strong></td>
</tr>
</tbody>
</table>

A more detailed discussion of the Performance Criteria and detailed Estimates can be found in the Appendices.
Funding Strategies
The Library is keenly aware of the economics of operating the current facility and the further effort needed to support a full program of services at an expanded venue. Funding strategies have been identified to minimize the impact to the community’s tax payers. The concern includes both capital and operational expenses. At a minimum the Library needs to evaluate its needs in anticipation of

- 2015 Operating Levy
- 2015 Bond Issue
- Potential Use of Tax Increment Financing (TIF) Bonding

In considering these aspects of delivering the service the Library, in partnership with City Administration, has sought innovative strategies to reduce the near and long term cost of the library project. The most promising has been developing the library building or site as a mixed use project.

Mixed Use Potential
Mixed Use projects seek public/private partnerships that provide greater benefit for both parties. In this instance the Library and City would offer part or all of the exiting library building or site to a private party to develop residential, retail and other commercial space.

Benefits to the Developer
This is key. As difficult as it is to think about the private entity first, the benefits sought on the public side do not occur if there is no benefit to the private sector, here generally termed the Developer. The Developer in this case gets access to the highest value piece of land in Marion. Prominence on 6th Avenue, opposite City Park Square, the center of the Uptown Corridor redevelopment effort, connections to other retail on 6th and 7th Avenues and the connecting frontage along 10th and 11th Street offer the developer, with the right mix of spaces, the potential to sell residential and retail space quicker and at higher profits than anywhere else in the area.

In exchange for this potential, the Library and the City have several potentials.

Benefits to the Library
The current site has value. A development agreement offers the potential to receive significant funds that would compensate the community for its investment in the site and building. The library is free of a building that needs substantial work just to replace antiquated mechanical, electrical and roofing systems. The Library can devote the proceeds of the land sale to the construction of a new facility that better meets its qualitative as well as quantitative needs. Revenue generated from the development of the site for private use will generate property and sales tax that, while not directly attributable to specific library costs, would balance the additional expenses incurred in operating a new, larger, better facility. A $10,000,000 private development could provide the same revenue to the city that the recent operation rate increase would have provided.
Benefits to the City
The City has the potential to see the direct financial benefits of increased tax revenues that will help support essential community services (the Library). As or more important the mixed use project will provide a true destination library that will draw other retailers and residential developers to the area. The project becomes an example to these other and generates additional development in Uptown which will entail additional revenues.

Benefits to the Community
The community at large has the potential for a great library at minimal cost with capital and future operation costs paid in part by revenue from the sale of the land and increased tax revenues accruing to the city.

Risks
As with any proposition, there are trade-offs. The project becomes a partnership and each party may need to balance its desire for certain specifics with a larger desire to see the project move forward. Moving the library off the 6th Avenue edge of City Park Square will have some impact on the library experience and identity. Such a move offers the greatest possibility to realize the potential benefits. Measures can be taken to provide other forms of connection to the Square or elements of identity if these are important.

Safeguards must be established to protect the essential interests of the Library, City and community without defeating the profit potential for the private sector Developer. The specific concerns that will need to addressed are library performance, economic return, urban amenities, aesthetic and functional control. Much of this is either in place though zoning or can be established as part of the Request for Proposal process that would be used to identify interested parties.

If as part of the review of the Developer Proposals the City and Library believe the community’s interests are not being served, the Request can be cancelled. The Library would then return to a more traditional process and funding mechanism.

Mixed Use as part of Performance Score
Because of the significant contributions possible within the Mixed Use concept, the "Context/Synergies" component of the overall score was given a high Importance Factor by the Charette Team. If fact it is the highest of the site related criteria.

Some effort has been made to determine a likely scope for the private sector development. Multiple conferences have been held with a series of interested parties to assess their interest, concerns, and thoughts on the assets and challenges for various site concepts. This does not represent commitment from any but several offered useful advice on a wide array of topics including reuse of the current library, maximum development potential, and the means to attract a wide array of proposals. A true measure of the overall potential of a mixed use approach though cannot be had without a formal Request for Proposals. This uncertainty, as well as the sharing of control inherent in such a partnership was also factored into the evaluations.
Site Comparisons

Notes on the Illustrations
The intent of the process is not to design a building or define a particular site use of a site but to determine if there is enough potential to support the long term needs of the library. In this sense there should be just enough analysis to consider the functional impacts of very broad space allocations across a site. Does it fit more than “what does it look like?” Having said that, what it looks like is an important consideration. Civic buildings, libraries in particular, have an obligation to respond to tier place in the community - these are expressions of a community's values, heritage and aspiration and go a long way toward establishing the character of entire neighborhoods and the perception of the community to those living there and to those looking at the community for a wide variety of reasons. This study used three dimensional diagrams to help understand the impact the density of the proposed developments could have on the site, the potential for defining significant identity for the library, for Uptown and for Marion, and the relationships between the library, its neighbors and any potential mixed use of the sites. It is easy to read too much into the illustrations. No specific design should be construed beyond basic massing (height, depth, proximity to the property line).

The three dimensional diagrams also assisted in evaluating the potential impacts of the external form/shape of the building on the internal functional arrangement of library functions. Critical among these concerns is the disposition of public services on multiple levels.

Reading the Score Card

<table>
<thead>
<tr>
<th>Performance Score</th>
<th>48.1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Size - initial</td>
<td>10</td>
</tr>
<tr>
<td>Size - future</td>
<td>9</td>
</tr>
<tr>
<td>Function - efficient plan</td>
<td>8</td>
</tr>
<tr>
<td>Function - adaptability</td>
<td>7</td>
</tr>
<tr>
<td>Context / Synergies</td>
<td>6</td>
</tr>
<tr>
<td>Identity</td>
<td>5</td>
</tr>
<tr>
<td>Control</td>
<td>4</td>
</tr>
<tr>
<td>Access</td>
<td>3</td>
</tr>
<tr>
<td>Amenities</td>
<td>2</td>
</tr>
<tr>
<td>Other site attributes</td>
<td>1</td>
</tr>
</tbody>
</table>

Performance Score - the sum of all the performance points
Importance Factor - relative significance of the Performance Category, also the highest possible score for that category.
Composite Site Index - the sum of all the building performance points divided by the sum of the potential building performance points, all multiplied by ten. ((SUM of Building Points)/(SUM of Possible Building Points))*10
Aggregate Performance Points for each category, green highlighting indicates the highest score received, red indicates the lowest.
Composite Site Index - the sum of all the site performance points divided by the sum of the potential site performance points, all multiplied by ten. ((SUM of Site Points)/(SUM of Possible Site Points))*10
Comparison Score - The relative relationship of the Performance Score to the highest Performance Score of the options studied. In this case 48.1/53.1 = 91
Option 1 - Stay on current lot, expand and renovate

Aerial View from the North East looking across 6th Avenue.

Goals:
The intent is to maximize reuse of the existing building as much as possible to accomplish three goals:

- Avoid public perception that a recently acquired perfectly adequate facility was being abandoned or demolished;
- Extend the budget as far as practical by utilizing pieces of infrastructure that still had extended utility;
- Maintain a strong tie to City Park Square, perceived as the long time home of the library (which it is not).

The overall performance evaluation of this option is the lowest of the group.
Assets, Liabilities, Challenges

- This is the smallest of the options. In order to fit within the project budget of $12,000,000 the library would be approximately 43,475 sf. The cost to get to 47,000 sf, the average peer library size, is $12,980,000.

- This involves significant funds to overcome the structural, fire rating and aesthetic challenges imposed by the form and construction of the existing building.

- The legacy areas that remain after renovation and expansion would be an on-going limitation and operating expense.

- There are significant issues related to adaptability caused by multiple lines of structure, non-standard structural bays, rated separations to partition the building into smaller areas defined by the class of construction. Many of these can be addressed by demolishing more of the structure but this becomes a different concept, one that is not focused on preserving the existing building. (There is 7,000 sf of existing building that would be demolished to accommodate the addition. This is seen as the limit for the concept.)

- Portions of the building would be located on a second floor. The majority of this would be staff and meeting space. The synergies and efficiencies of having these space near the public zones of the library is performance limitation.

- For those that sought to preserve the look, the addition largely demolishes or surrounds the most recognizable pieces of the existing.

- Does not make available the highest value land in the City to potential development. This limits the economic impact of Uptown, limits the potential of Uptown and dilutes the Square as a driver of the classic Main Street vision.

- Costs as much as any of the other concepts and gets the least in terms of performance, both as a library and as an economic, urban quality of live asset.

+ Easiest to explain to the public.

+ Avoids a public perception problem, maybe. It would depend on the acceptance of the work near the current entry.

+ Keeps the library on City Park Square
Option 1a - Stay on the current lot, replace the existing building

Goals:
The intent is to maximize reuse of the existing site as much as possible to accomplish three goals:

- Avoid public perception that the site is being given away;
- Introduce some mixed-use potential to generate revenue and spur further economic development in Uptown;
- Remain near City Park Square, without taking up other prime real estate along 6th Avenue.

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The overall performance evaluation of this option is the second highest (tie) of the group.
Assets, Liabilities, Challenges

- For those that sought to preserve the existing building, it's gone
- Could still encounter public apprehension of process, partnership, replacement of what is perceived as a "new" building
- This involves significant funds to move library operations to an interim facility during demolition and construction.
- This involves significant funds to demolish the existing building.
  - May be difficult to explain to the public. The Development potential would need to be translated into specific commitments prior to advancing the project.
  - Library is no longer on City Park Square
+ This is the second largest of the options. In order to fit within the project budget of $12,000,000 the library would be approximately 45,000 sf. The cost to get to 47,000 sf, the average peer library size, is $12,500,000.
+ There are no legacy areas that remain after reconstruction.
+ There are no significant issues related to adaptability caused by multiple lines of structure, non-standard structural bays, rated separations to partition the building into smaller areas defined by the class of construction.
+ Allocations of public spaces would be simple and allocated across two floors based on primary functional adjacencies
+ Makes available the highest value land in the City to potential development. This enhances the economic impact of Uptown, the urban potential of Uptown and provides essential support to the Square as a driver of the classic Main Street vision.
+ Costs as much as any of the other concepts and gets significant return in terms of performance, both as a library and as an economic, urban quality of live asset.
This concept had a wide variety options explored, partly as a means of explaining the concept, partly as a way of understanding the physical image and partly to consider the costs to develop some of the preferred image ideas. The Charette Team concluded that the only true test of the concept would require vetting through a mixed use RFP process. To make the evaluation process conservative, the least dramatic, most cost effective option was singled out for scoring. The other variations are summarized here:

This variation maintained some connection for the Library to City Park Square and offered the desired drama for the Uptown Area but added considerable complexity and thereby cost to address the code related aspects of very mixed set of uses. There was concern that those costs would limit the Developer's ability to find a workable financial model.

This variation maintained some connection for the Library to City Park Square and offered the desired drama for the Uptown Area. The added complexity and cost was reduced by simplifying the stacking of uses. There was concern that while the costs were reduced, the more limited number of residential units would again limit the Developer's ability to find a workable financial model.
Option 2 - Renovate the current facility and expand over 11th Street

**Aerial View from the North West looking across 6th Avenue.**

**Goals:**
The intent is to maximize reuse of the existing site as much as possible and get a new library building to accomplish three goals:

- Avoid public perception that the site is being given away;
- Introduce some mixed-use potential to generate revenue and spur further economic development in Uptown;
  - Get a new library building with drama and some connection to remain near City Park Square.

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**COMPARISON SCORE** | **95**

The overall performance evaluation of this option is the second highest (tie) of the group.
Assets, Liabilities, Challenges

- Could still encounter public apprehension of process, partnership, replacement of what is perceived as a "new" building.

- The potential for Developer use of the existing building is limited according to the Development teams approached during the study.

  - The Library is relocated to another valuable piece of 6th Avenue but retains some significant symbolic presence on a major street and near, but not across from, City Park Square.

  - May be difficult to explain to the public. The Development potential would need to be translated into specific commitments prior to advancing the project.

  - In an improved but limited way, this makes available the highest value land in the City to potential development. This enhances the economic impact of Uptown, the urban potential of Uptown and provides essential support to the Square as a driver of the classic Main Street vision.

  - For those that sought to preserve the existing building, it's still there with a new purpose.

  - That new purpose supports the Main Street vision of City Park Square and extends retail along another edge.

  - Library operations continue in existing building until the new building is complete.

  - This is the second smallest of the options. In order to fit within the project budget of $12,000,000 the library would be approximately 43,550 sf. The cost to get to 47,000 sf, the average peer library size, is $12,950,000.

  - There are no legacy areas that remain after reconstruction.

  - There are no significant issues related to adaptability caused by multiple lines of structure, non-standard structural bays, and rated separations to partition the building into smaller areas defined by the class of construction.

  - Allocations of public spaces would be simple and allocated across two floors based on primary functional adjacencies.

  - Costs as much as any of the other concepts and gets significant return in terms of performance, both as a library and as an economic, urban quality of live asset.
Option 2a - Replace the current building, bridge across 11th Street

Aerial View from the North West looking across 6th Avenue.

Goals:
The intent is to maximize reuse of the existing site as much as possible and get a new library building to accomplish three goals:

- Avoid public perception that the site is being given away;
- Introduce some mixed-use potential to generate revenue and spur further economic development in Uptown;
  - Get a new library building with drama and some connection to City Park Square.

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The overall performance evaluation of this option is the highest of the group.
Assets, Liabilities, Challenges

- For those that sought to preserve the existing building, it's gone
  
  o The Library is relocated to another valuable piece of 6th Avenue but retains some significant symbolic presence on a major street and near, but not across from, City Park Square
  
  o May be difficult to explain to the public. The Development potential would need to be translated into specific commitments prior to advancing the project.

+ Makes available the highest value land in the City to potential development. This enhances the economic impact of Uptown, the urban potential of Uptown and provides essential support to the Square as a driver of the classic Main Street vision.

+ Library operations continue in existing building until the new building is complete.

+ This is the third largest of the options. In order to fit within the project budget of $12,000,000 the library would be approximately 44,300 sf. The cost to get to 47,000 sf, the average peer library size, is $12,730,000.

+ There are no legacy areas that remain after reconstruction.

+ There are no significant issues related to adaptability caused by multiple lines of structure, non-standard structural bays, rated separations to partition the building into smaller areas defined by the class of construction.

+ Allocations of public spaces would be simple and allocated across two floors based on primary functional adjacencies

+ Costs as much as any of the other concepts and gets the best return in terms of performance, both as a library and as an economic, urban quality of live asset.
Option 3 - Build a new facility in 11\textsuperscript{th} Street parking lot

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{Aerial_View_NW_6th_Ave.png}
\caption{Aerial View from the North West looking across 6th Avenue.}
\end{figure}

**Goals:**
The intent is the maximize reuse of the existing site as much as possible to accomplish three goals:

- Avoid public perception that the site is being given away;
- Introduce some mixed-use potential to generate revenue and spur further economic development in Uptown;
  - Get a new library building with drama and some connection to City Park Square.

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**COMPARISON SCORE**

The overall performance evaluation of this option is the second highest (tie) of the group.
Assets, Liabilities, Challenges

- For those that sought to preserve the existing building, it's gone
- Could still encounter public apprehension of process, partnership, replacement of what is perceived as a "new" building
- This involves significant funds to move library operations to an interim facility during demolition and construction.
- This involves significant funds to demolish the existing building.
  - May be difficult to explain to the public. The Development potential would need to be translated into specific commitments prior to advancing the project.
  - Library is no longer on City Park Square
- This is the second largest of the options. In order to fit within the project budget of $12,000,000 the library would be approximately 45,000 sf. The cost to get to 47,000 sf, the average peer library size, is $12,500,000.
- There are no legacy areas that remain after reconstruction.
- There are no significant issues related to adaptability caused by multiple lines of structure, non-standard structural bays, rated separations to partition the building into smaller areas defined by the class of construction.
- Allocations of public spaces would be simple and allocated across two floors based on primary functional adjacencies
- Makes available the highest value land in the City to potential development. This enhances the economic impact of Uptown, the urban potential of Uptown and provides essential support to the Square as a driver of the classic Main Street vision.
- Costs as much as any of the other concepts and gets significant return in terms of performance, both as a library and as an economic, urban quality of live asset.
Conclusions, Recommendations, Next Steps

The Charette Team concluded that multiple options are available. The most attractive but least defined is some form of mixed use development. The Charette Team determined that it was not important to select the preferred form of the mix or the specific site arrangement at this time. These issues need to be resolved in partnership with a broader Development Team.

Consensus emerged that renovation and expansion is least desirable choice, based on:
- Cost/benefit value—the current building has experience more than expected wear and is aging fast; its building systems and functionality are used-up.
- Library space—the current building suffers from a design for a different era of library service.
- Aesthetics—the form of the current building, though pleasant, is out of place in an urban context and does not support easy expansion or renovation.
- Renovation and expansion of the current building could work if it had to but would represent a lost opportunity with regard to the urban amenity, economic development, financial sustainability, and library experience side of the equation.

A further consensus emerged that mixed-use offers new possibilities and opportunities –
- It offers a cost-effective means of achieving a desirable goal—a new library.
- The current library is located on some of the most highly valued land in the City. It has substantial potential for generating economic development and tax revenue if given over to commercial purposes.
- The Charette Team sees the value of a new library facility/mixed-use development for both library services and the economic development of Uptown. The right mix of library service and commerce can yield direct benefits for both, as well as ancillary benefits for the community. An anchor tenant with a regional market and a strong emphasis on the right kind of residential component would be a stimulant to Uptown development.

There are challenges with any of the approaches including a mixed use concept.
- It is still not clear how a mixed use development should be configured.
- It is not clear whether library and commercial components should be integrated into a single structure.
- A majority of the Charette Team prefers a clearly identifiable library component:
  - A building designed to be a library is preferred, not constrained by other purposes
  - A location that allows service from the current building while new one is under construction
- Developers may have ideas regarding location and design that may have value—a means to encourage developer input should be identified.
- Design and construction priorities will need to be identified—providing Marion with the best possible library must be the first priority.
There is an awareness that the mixed-use offers great reward but comes with some risk:

- **Low level** – Concern about the extent of developer interest and the ability to generate the full range of potential benefits sought for the Library, City and community
- **High level** – Awareness that unless developer commitment can be established in advance, there may be limited public support for moving away from a renovation/expansion. The underlying concern is that the public will not value a new building on quality of library experience alone and that such improvements must be accompanied by obvious economic/revenue enhancement.

**Recommendation**

The Charette Team recognizes that merely renovating and expanding the current facility will lose the economic benefit of a mixed-use development and result in a less than optimal library facility. It also recognizes that moving forward with a mixed-use plan depends on developer interest and commitment and that it is possible that the Board and City will have to fall back on a plan that does not rely on mixed-use. If that is the case, the Team still prefers a new facility and a process that will allow service to be maintained from the existing building while a new facility is constructed. The Charette Team determined that a new facility will realize the best cost/benefit ratio, but recognizes that renovation and expansion of the current facility may be the only feasible option.

Thus the Charette Team recommends a tiered approach moving forward in the following sequence:

1. Expedite exploration of Mixed Use potential through a formal Request for Qualifications (RFQ) process utilizing a framework that defines the City’s and Library’s needs (as distinct from desires) as the prime evaluation standard. The library component should support not be constrained by other uses and should allow the library to remain in operation until the new facility is complete.

2. If a mixed use development is not possible within the very near future, a new stand-alone building should be constructed on a site on or close to City Park Square so as to derive the future economic stimulus desired.

3. If for any reason a new building is not a feasible project, a wholesale renovation and expansion of the facility should be pursued.

**Action Steps**

To this end, the Charette Team recommends that the Library Board of Trustees create a Task Force to work with City officials to:

- Develop and issue to developers a Request for Qualifications that solicits specific formal mixed use development proposals
- Evaluate the responses for performance against the Library’s and the City’s specific goals
- Determine if any of the responses meet the long terms needs of the community better than a more traditional approach
- Return to the Library Board and City Council with recommendations as to the preferred course of action.
Appendix 1 - Detailed Evaluation Criteria

Site (and thereby Building) Size Importance Factors 10 and 9

Premise:
At some level the basic arithmetic for success is driven by the total available site area. This in turn drives building size and the ability to meet the Program requirements for accessibility, merchandising, group and individual activity zones and technology.

In Marion, by virtue of the phased implementation and the uncertain nature how the community’s long term space needs will be addressed, this Evaluation Criteria was split into two components. The first, Initial Size was assigned and importance factor of 10. Future Size is the ability of the site to support additional library and related support spaces such as parking was assigned an importance factor of 9.

This criterion includes three weighted components:
- Initial building size, in comparison to a Program goal of 84,491 square feet.
- The target for initial size is more modes, something between 41,000 and 47,000 gross square feet.
- Overall Site area available beyond the building footprint to support parking, storm water management, and appropriate landscape buffers.
- Future building size: the potential for future expansion.

Given the nature of library service as it is presently delivered and the trends emerging through technology and societal expectations, the evaluation criterion was weighted heavily in favor of initial building size.

Questions considered include:
- Are there factors that limit the ‘effective size’ of the particular site concept
- Existing structures
- Site geometry
- Environmental conditions
- Topography
- Will the building, along with the parking, and other site requirements, fit within the prescribed setbacks?
- How tight is all of this?
Functional, Efficient Plan     Importance Factor of 8

Premise:
Two buildings of the same total area on different sites can have drastically different floor plans. These plans can promote or fight delivery of service and thereby impact effectiveness and operating costs.

Similarly, two buildings of the same total area with different floor-to-floor heights can have drastically different performance levels. These heights can support or restrict certain uses, utility, energy consumption and usage.

This plan criterion includes three weighted components:
- The net available area matches the Program requirement
- The shape of the building is reasonably simple
- The structural system of the building is regular, free of intermediate bearing walls, free of double column lines, and restricted capacity floor slabs.

Questions considered include:
- Does the site concept maximize the shape of the site and allow the design of a simple, functional building?
- Does the site force an irregularly shaped building?
- Are there an inefficient number of public service levels or arrangements that require additional staffing?

This height criterion includes four weighted components:
- The net available ceiling height to accommodate effective ducting to distribute conditioned air through the building without excessive increases in equipment or energy cost
- The net available ceiling height to accommodate effective light distribution through the collection stack area without excessive increases in equipment or energy cost
- The net available ceiling height and slab depth supports effective power and fiber optic distribution through the building.
- The site supports a building with no more public floors than programmed public service points. Essentially this avoids the public wandering around on an unstaffed floor or the expense of putting staff on a floor just to provide supervision.

Questions considered include:
- Does the site concept include use of existing structures that have a low floor-to-floor height?
- Does the site zoning include restrictions that would force a low floor-to-floor height?
- Does the site area force a building that needs more staffed service points than are needed strictly for service just to maintain control and safety on multiple floors.
Adaptability  Importance Factor of 7

Premise:
The relevance of library service is dictated by the ability of the staff to respond to constantly changing use patterns. An adaptable building will reduce the difficulty and cost associated with accommodating shifts in use over time.

This criterion includes eight weighted components:
The weighting is based on the frequency with which a library will most likely want to change the particular physical attribute in order to accommodate a new service pattern: the attribute most likely to need change is weighted heavier than those items needing occasional modification. This is balanced with a degree of difficulty which assesses the expense of modifying a particular physical attribute.

- **Furnishings** Furniture sees frequent changes. The limiting factors are the structural grid and wall arrangement.
- **Activity Spaces** These spaces see frequent adjustments to stay current with rapidly evolving use patterns. The limitations are imposed by furnishings, wall arrangements and structural elements.
- **Data Connections** The data network is less dependent on physical connections than in the past but still depends on robust pathways for primary distribution, high capacity fiber elements, and specialized connections. Frequent adjustments are needed to stay current with rapidly changing technology typologies. The limitations are imposed by floor construction and floor-to-floor heights.
- **Power Connections** The power distribution is still very dependent on physical connections. Frequently furniture adjustments – the most common type – will be accompanied by the desire to make corresponding adjustments to the power grid to stay current with rapidly evolving technology use patterns. The limitations are imposed by floor construction and floor-to-floor heights.
- **Events Spaces** These spaces are seeing more frequent adjustments to match the evolving transformation of the library into an interactive, group focused venue for various presentations and activities. The limitations are imposed by furnishings, wall arrangements and floor-to-floor heights.
- **HVAC Systems** These support systems are seeing more frequent adjustments to match the evolving transformation of the library into an interactive, group focused venue for various presentations and activities. The limitations are imposed by furnishings, wall arrangements and floor-to-floor heights.
- **Partitions** Use patterns may shift across the course of a day, and certainly over the life of the building. Non-bearing walls are essential, shifting mechanical and electrical systems out of walls is imperative, and considering operable walls or no walls in certain locations is key to maximizing the utility of various spaces. The limitations are imposed by furnishings, wall arrangements and floor-to-floor heights.
- **Internal Image** Though infrequent, there is still the occasional need to update the finishes in a space. Looking the part is essential to establishing a confident user. Technology and Teen areas in particular are spaces that see differing use levels based on their appearance as much as their functionality. Limiting factors include wall arrangements, column spacing and floor-to-floor height.

Questions considered include:
- What can be changed? How often will it need to be changed? How much will it cost to change?
Context (typically Context/location)  Importance Factor 6

Premise:
Location. Location. Location.

This is the one element that good design and large budgets cannot overcome. As such it typically places quite high in the overall prioritization. For Marion this was less of an issue because the large scale aspects of location were essentially the same for each scheme. The smaller scale issues associated with context are found in the differences in facing City Park Square compared to facing the Marion Mall.

With limited resources it is more important to select a site that offers the access, connections and synergies sought without adversely impacting the existing or anticipated development adjacent to a site.

This criterion includes seven weighted components:

- The ability of the neighboring development to support library users through convenient and desired synergies through proximity to cultural, civic, educational, residential or retail areas
- The overall ability of the site to support a building of the scale anticipated by the Program.
- The ability of the site to limit potential negative impacts on existing uses, and anticipated development, road and other infrastructure networks, and general enjoyment of the neighborhood. This aspect of the evaluation was weighted heavily – First, do no harm!
- Highest and Best Use Is the Library the best use of the site?
- Sales Tax Revenue Change By using the site as a Library, will the City see a disproportionate decrease in revenue?
- Property Tax Revenue Change By using the site as a Library, will the City see a disproportionate decrease in revenue?
- Reuse of existing Library Relocating will require disposal of the building and property. The realistic value and time to sale are indeterminate by virtue of the unique nature of the property and the current market conditions. Scoring simply acknowledges that reusing the existing site avoids this issue.

Questions considered include:

- Is the neighborhood compatible with and able to support a high level of public activity over an extended portion of the day?
- Is the site easy to access with minimal disruption to existing and anticipated surrounding uses?
- Does the development displace an amenity?
- Can the development be an attractive addition to the neighborhood?
- Is the site convenient?
- Is the site central to Marion?
- Is the surrounding land use and development consistent with the function and image desired by the library and community for this facility?
Identity/Image Importance Factor of 5

Premise:
The Library should fit within and contribute to the overall character of its surroundings, be prominent, and expressive of community values.

This criterion includes three weighted components:
- Current and anticipated/desired uses of adjacent parcels
- Architectural and planning traditions and goals
- Synergies with Library mission and internal uses
Control of Site  Importance Factor of 4

*Premise:*  
The ideal site is of no value if the Library cannot gain control of the parcels and begin development of an expanded or new facility. The importance factor assigned reflects the concerns about the availability of certain sites, the approvals process for permitted uses, and coordinating the rights, interests and objections of adjacent and nearby property owners.

*This criterion includes three weighted components:*  
- Ownership  
- Timing  
- Regulatory Parameters

*Questions considered include:*  
- Who owns the site?  
- Is the site available for purchase?  
- What time frame is involved in transferring ownership?  
- Are there conditions on transfer of ownership?  
- Does the site development concept require special approvals from authorities having jurisdiction over the site? (Zoning, Building Code, Historic Preservation, Transportation at the local, county or state level)  
- Are environmental approvals required to develop the site?
Access/Parking  Importance Factor of 3

Premise:
Use of the library is a combination of the quality of the service and its accessibility. A lack of parking and an out of the way location deter visits. Easy parking, pedestrian and bicycle access, and drive-through book return options promote visits and increase user satisfaction. Sites that support these use patterns expand the effectiveness of the library.

In Marion the consensus was that a further investigation of the overall Uptown parking needs and resources was needed. At some point a structured approach to parking will be implemented. The improved library is anticipated to draw additional use of the facility and of nearby commercial operations. It is also anticipated to promote residential development in the area. All of which will accelerate the need for a neighborhood wide parking concept.

This criterion includes six weighted components:

- On-site parking. This is scored as the number of parking spaces available compared to the number required by zoning.
- Drive through book return. This is scored based on the ease of on-site vehicular movement without interfering with pedestrian traffic.
- Bicycle access. This is scored as the number of bicycle parking spaces available compared to the number required by zoning.
- Pedestrian access. This is scored as the number of residential units available near to the site and within the corporate limits of the city.
- Vehicular access path. This is scored as the average number of turns required to reach the site from the two nearest primary thoroughfares in the city.
- Off-site parking. This is scored as the number of parking spaces available compared to the number required by zoning.

Questions considered include:
- Can you get to the site easily and safely from the various geographic regions of the community?
- When you arrive at the site, is it easy to get to the building from sidewalks? From parking? From bike paths?
- How likely is it that I will find a place to park when I go to the Library?
Amenities  Importance Factor 2

Premise:
Users of the library come with different expectations at each visit. The library experience is enhanced and the effectiveness of the service maximized if the site affords different environments: active and dynamic in some areas, quiet and reflective in others. Successful library sites allow landscape buffers that provide different levels of separation or connection to the surroundings and create the types of space needed to support a variety of use patterns.

This criterion includes the following weighted components:
- Landscape, sculpture or other site assets that support education
- Landscape, sculpture or other site assets that support recreation
- Open Space adjacent to building to support Natural Light in the Library
- Views from the interior of the library

Questions considered include:
- Is there anything special about the site development concept that can be enhanced or will enhance the Library? Views? Natural features?
- Are there opportunities to create a pleasant environment around the library?
Perception  Importance Factor 1

Premise:
Some sites offer unique opportunities to address other needs or desires. The library building may be the means of addressing multiple challenges facing the community. If the library function is not compromised, the overall value of the project may be increased by addressing several challenges with a single project. Conversely, the site selected may work well for the Library but limit other opportunities for the City. When all is said and done, the premise here is that if the site offers a good resolution of issues associated with all of the other Evaluation Criteria and is economically viable, then the community will be supportive of the investment. Some significant effort may need to be made in explaining aspects of the preferred concept or how the concept was selected. Inherently complicated approaches tend to be more problematic as well as more difficult to explain. There is value in simplicity.
Ease of Construction  Not Used

Premise:
With finite resources the project needs to fund service-based objectives and not extensive site remediation, specialized construction systems or elaborate methods to overcome poor soils, high water tables, or other site related challenges.

In Marion the typical physical aspects of the site development are constant between the options and do not present an opportunity to discern which is of greater benefit or economy to the community.

This criterion includes the following weighted components:
- Floodplain
- Geotechnical Considerations
- Utilities Access
- Storm Water Management
- Environmental Considerations

Questions considered include:
- Is the site in an area prone to flooding?
- What are the soil conditions at the site?
- Are utilities available at the site?
- What means are needed to manage storm water?
- What are the issues related to environmental cleanup prior to purchase, during construction, and after occupancy?

A note on Safety
Safety is always a concern. In Marion the primary challenge to public safety is traffic congestion. Libraries generate significant visits that can exacerbate traffic issues in already heavily used areas. Sites with congestion, vehicle-pedestrian interferences, and competition for peak time parking deter visitors from using the facility and service. This element has been considered in the Access/Parking evaluation.