

King County Library System (KCLS)
Request for Qualifications
Consultant to facilitate physical Way-Finding solutions for KCLS

The King County Library System is seeking a consultant to facilitate physical Way-Finding solutions for the library system. KCLS would like to make it easier for patrons to discover and access the full breadth and depth of the collection, as well as other KCLS products and services. While KCLS intends to address this “Way-Finding” through a combination of patron education, staff training, computer system upgrades, this Request for Qualifications focuses on the physical solutions.

The physical Way-Finding solutions must include, but are not limited to:

- library layout and fixturing
- merchandising and permanent display of the collection
- permanent signage
- the location of promotional materials, electronics or displays.

KCLS operates as a system, with 43 library branches of varying sizes and purposes. Physical Way-Finding must address the needs of the individual branches and be consistent, but not identical, system-wide (i.e. signs might have the same color/graphic treatment, but be sized and located to fit the layout of the specific branch). Since KCLS serves a very diverse population, physical Way-Finding must address the needs of patrons who have varying familiarity with the library system, ages, physical abilities, socio-economic backgrounds, literacy and English proficiency.

The passage of a capital bond in 2004 presents an opportunity to execute physical Way-Finding solutions as part of scheduled renovations and new construction.

Background of Way-Finding

In 2005 KCLS launched and completed a Patron Experience Transformation Project (PETP) to ultimately be able to articulate a “Gold Standard” experience in support of the KCLS vision of providing an intellectual adventure in the heart of the community. While very high satisfaction runs remarkably broad and deep among KCLS patrons, the opportunity for improvement came in two major areas: 1) to continue to build awareness of products and services offered by KCLS; and 2) to provide better functionality of “information access”. Way-Finding was identified as a way to strategically guide and educate current and also new library users.

Subsequently, in early 2006 KCLS conducted a Way-Finding Discovery Project to:

- Deepen KCLS’ knowledge of Way-Finding, bringing together learning in the field and best practices from other organizations facing similar issues; and
- Frame the problem from the point of view of the patron, drawing on PETP and other research, and supplementing with staff input.

The learning from this Project is included as Attachment A. This research should be used (**particularly the KCLS Hypotheses**) to guide the Way-Finding solutions that will be proposed and facilitated by the Consultant.

Submittal Requirements:

- **Primary Requirement:** The firm/company must have completed at least three (3) projects of similar type and scale within the past five years that involved complex Way-finding solutions across multiple sites. Such way-finding projects must have included fixturing, design/layout, product merchandising and permanent signage/display.

Each submittal of qualification must also include:

1. A brief letter of introduction
2. An organizational chart and summary resumes of key personnel who would be assigned to the project, including designations of the project manager and all other proposed team members/sub consultants and their roles
3. List of projects completed for public agencies/organizations
4. Examples of the Primary Requirement projects (above)
5. Current names and telephone numbers of at least three (3) references for related projects.

Limit items 1-3 to a total of ten pages total.

Other instruction:

- Submittals shall consist of 4 copies and may be mailed or hand-delivered to Greg Smith, Associate Director, Facilities Management Services, King County Library System, 960 Newport Way NW, Issaquah, WA 98027.
- The outside of the envelope/packet must be marked "RFQ-WAY-FINDING PROJECT."

Deadline: Submittals must be received no later than **Friday, September 8, 2006 at 4pm PST.**

A Pre-Submittal Discussion will be held at the KCLS Service Center (960 Newport Way NW, Issaquah WA 98027) on Friday, August 25, 10am-Noon. All interested parties with questions are encouraged to attend; attendance is not mandatory. Parties located outside the Seattle area are invited to participate via conference call (call 425.369.3273 no later than Wednesday, August 23 for number and pass code).

All written questions should be submitted no later than **Friday, August 18, 4pm** to Greg Smith, King County Library System, 960 Newport Way NW, Issaquah, WA 98027; email ggsmith@kcls.org office number 425.369.3237, fax 425.369.3310. All written questions will be responded to in writing no later than August 30, 2006.

Selection Process: The submittals will be evaluated the week of September 11 and a short list will be compiled for interviews. Interviews will be scheduled in late September-early October 2006.

Submittals will be evaluated and screened by staff representing the King County Library System. Finalists will be interviewed by representatives of the King County Library System.

The King County Library System reserves the right to reject any and all responses and to waive irregularities and informalities in this selection process.

Dates of publication in the Seattle Daily Journal of Commerce and Seattle Times:
July 31st, August 2nd, and August 7th, 2006.

ATTACHMENT A

KCLS PROPOSAL

Project Eureka!

Phase II

Parameters for RFP Brief

INTRODUCTORY INFORMATION

KCLS

PETP Survey results summary (Section 6)

King County Library System completed a Patron Experience Transformation Project (PETP), in the summer of 2005 in which 5400 patrons were surveyed about their customer experience. An executive summary is provided in the appendix.

The Top Line -Very high satisfaction runs remarkably broad and deep among KCLS patrons. Staff interactions are a key strength, and KCLS sets the gold standard of service for patrons. The opportunity for improvement comes in two major areas:

1. Continue to build *awareness* of products and services offered by KCLS
2. Provide better *functionality* of "information" access, including: improving computer systems and access, perceived and/or actual collection variety, and holds; expanding open hours; and enhancing the physical space and clarifying patron policies to help lower noise levels

Patron Segments - Six patron segments were identified through data analysis:

Disengaged - Individuals who are less than ecstatic about KCLS (1-4 SAT or L2R)
9%

Teen Club - Enthusiastic students and future adepts 8%

Adepts - Power readers who squeeze all the value they can out of KCLS 8%

American Dreamers - Diverse, newer arrivals to King County 10%

Moms On The Go - Women raising kids who consider the library a given in their lives 12%

KCLS Regulars - The King County establishment, older, affluent, mostly Caucasian (further subdivided by working versus retired) 40%

(An additional 13% of patrons could not be classified because of missing data)

KCLS strategic blueprint (Section 7)

The outcome of the PETP project was to articulate a “gold standard” experience in support of the vision of providing an intellectual adventure in the heart of the community. Eureka! Moments are as unique as each patron and can be anything from the excitement of a child learning how to sound out a new word to a car enthusiast finally locating the manual to his 2001 Toyota.

KCLS developed a Strategic Plan to better deliver this experience, founded on the four strategies of creating adepts, focusing on function, enhancing environment, and building on unique strengths. Way-finding is a key component to creating adept patrons who can get full value out of the KCLS system.

Strategic Blueprint: At a Glance

- A** **Courtesy and Mutual Respect: clearly defined and consistently enforced**
★ **Code of Conduct: Articulation, display and enforcement (including cell phone use); staff training**
- B** **Community Partnerships: develop, nurture and leverage for System-wide value**
Develop and articulate objectives; develop volunteer policy and effectively manage volunteer base; explore with patron groups, business and community organizations
- C** **Create Adept Patrons: through physical way-finding strategies (patron-oriented interior arrangements, display, signage, marketing) and information-sharing strategies**
★ **Develop and implement “way-finding” program; strategically guide and educate new library users**
- D** **Create Adept Staff: supported and accomplished through KCLS culture, communications and staff-development opportunities**
Emphasis on flexibility, adaptability, teamwork and collaboration; ★ **proactive, two-way communication; articulation of clear priorities and direction**
- E** **Convenient Access: library services are accessible to all**
★ **Expand open hours; improve accessibility to buildings, technology; adequate parking; staff organization for patron access to individual assistance**
- F** **High Functioning Technology/Systems: infrastructure and “back room” systems support seamless patron experiences**
★ **Fix existing technologies to improve/enhance service and standardize functional hardware/software across System; safe and sufficient cabling and electrical outlets**
- G** **Shhh & Ahhh: KCLS offers a haven of comfort and quiet (along with space for social outlet)**
Design zones for noise/quiet; incorporate comfortable, inviting touches in design schemes; place for parents to read to children
- H** **Awareness: heightened through promotion, marketing, web design and catalog**
Deliver through access points in library; **redesign web site** and intranet; establish hierarchy of communication, targeted promotion strategy to reach patron segments

Values **Mutual Trust; Respect and Responsibility; Inclusiveness**

Vision

Provide an intellectual adventure in the heart of the community.

Gold Standard Experience

Eureka!

Strategies

Create adepts
Focus on function
Enhance environment
Build on unique strengths



★ Priority for 2006-2007

Way-finding delivery expectations (Section 8)

The problem

KCLS would like to make it easier for patrons to discover and access the full breadth and depth of the collection, as well as other KCLS 'products' and services.

KCLS intends to address this "way-finding" problem through a combination of patron education, staff training, computer system upgrades, and physical solutions. This RFP focuses on the physical solutions.

Way-finding can mean:

- "Orienteering" -
 - Making patrons aware of what KCLS has, and where/how to find it
 - General help navigating individual branches, e.g. finding the computers
 - Helping a patron find what he/she came for, e.g., book searches
- In context search -
 - Offering additional information or guideposts to help patrons once they have embarked on a search, e.g., signs in the stacks
- Enrichment -
 - Suggesting books, other materials, resources and events that might be of interest

Physical way-finding solutions can include: library layout and fixturing, merchandising and permanent display of the collection, permanent signage, and location/use of promotional materials.

A bond issue was passed recently, which presents an opportunity to execute physical way-finding solutions as part of scheduled renovations and new construction. The next wave of renovations/new buildings to be designed in 2006 and implemented in 2007 is under way.

What has been done so far to define the way-finding problem

KCLS returned to the PETP survey results to take a closer look at the full range of way-finding problems patrons are experiencing. KCLS subsequently sent members of the staff to various of its branches to observe patrons as they navigated through them, and tracked frequently asked questions of the staff to identify other way-finding concerns that may not have been captured by the PETP survey.

PETP highlights specific to way-finding:

- Low awareness of KCLS “branded” offerings, including programs or services that would facilitate discovery of the collection (Ask a Librarian, Summer Reading Program, Good Reads, Choice Reads, etc.). *Note that patrons might have known about the programs but not known them by name.*

| KCLS Patron Experience Survey | | | | | |
|---|---------------|------------------|----------------|------|---------------|
| TOTAL AWARENESS: Used + Attended Combined | | | | N = | 5404 |
| Which of the following have you heard of or used or attended? | Heard of this | Used or Attended | Response Total | Rank | Percent Resp. |
| Self Check Out | 1280 | 2959 | 4239 | 1 | 78.44% |
| Ask a Librarian | 1355 | 1194 | 2549 | 2 | 47.17% |
| 2005 Summer Reading Program | 1778 | 539 | 2317 | 3 | 42.88% |
| Story Time | 1563 | 513 | 2076 | 4 | 38.42% |
| Friends' Book Sales | 1125 | 899 | 2024 | 5 | 37.45% |
| Computer Classes | 1552 | 342 | 1894 | 6 | 35.05% |
| Good Reads | 981 | 639 | 1620 | 7 | 29.98% |
| eBooks | 1245 | 299 | 1544 | 8 | 28.57% |
| Choice Reads | 804 | 572 | 1376 | 9 | 25.46% |
| Teen Zone | 1071 | 285 | 1356 | 10 | 25.09% |
| Homework Help (tutoring) | 1203 | 111 | 1314 | 11 | 24.32% |
| The Study Zone | 1065 | 170 | 1235 | 12 | 22.85% |
| ESL (English Language) Classes | 1120 | 73 | 1193 | 13 | 22.08% |
| Inside KCLS Newsletter | 771 | 381 | 1152 | 14 | 21.32% |
| e-Audio | 812 | 201 | 1013 | 15 | 18.75% |
| Read Three, Get One Free | 788 | 163 | 951 | 16 | 17.60% |
| Accelerated Reader | 622 | 292 | 914 | 17 | 16.91% |
| Ready, Set, Read | 724 | 180 | 904 | 18 | 16.73% |
| Live Homework Help (online) | 710 | 114 | 824 | 19 | 15.25% |
| Early Literacy Programs | 732 | 76 | 808 | 20 | 14.95% |
| KidsPage (online) | 555 | 243 | 798 | 21 | 14.77% |
| Book @lert | 471 | 232 | 703 | 22 | 13.01% |
| Citizenship Classes | 653 | 39 | 692 | 23 | 12.81% |
| Talk Time | 583 | 70 | 653 | 24 | 12.08% |
| Global Reading Challenge | 355 | 76 | 431 | 25 | 7.98% |

KCLS 2005

| |
|------------|
| Used Most |
| Used Least |

*Ask a Librarian is the “brand” name of the KCLS online reference service. Anecdotal evidence suggests some respondents interpreted this item to mean asking a question of a staff member.

- When patrons come to the library, they tend to engage most frequently in basic library activities, such as borrowing and returning materials and browsing the collection (Fig. 24). More than three in ten respondents indicated they used the Internet or checked their email during their last visit, confirming observations made by KCLS staff. The library still attracts in-branch readers: About one in four respondents come in to read periodicals.
- Patron behavior KCLS can leverage:
 - A high percent (48%) of all patron segments browsed on their last visit
 - ✓ Disengaged lowest at 40% v. Moms at 59%
 - Not all patrons use kcls.org yet
 - ✓ 40% visited kcls.org 4 or fewer times in past 6 months
- All patron segments are looking for improved variety and choice in the collection, which given its absolute size, we believe to be at least partly a perception problem. Lower scores on KCLS performance were seen in:
 - Book choice - All except Adept, who have learned the KCLS systems
 - Easy to locate materials - All except Adept
 - KCLS.org site is easy to use - Adept (who have “kicked the tires” on this the most)
- Patrons expressing way-finding concerns or suggestions in the open ended questions are overwhelmingly asking for ‘more’ materials of all kinds. This held true for all patron segments:

| | |
|---|----|
| • Finding books/materials | 7% |
| • Using catalog, database, kcls.org | 15 |
| • Signage, labels, maps | 4 |
| • Layout, organization | 3 |
| • Display, merchandising, browsing | 5 |
| • Finding out about new materials, events, services | 8 |
| • Selection/ “More” | 54 |
| • Finding, communicating with staff (& patrons) | 3 |
- Selection/“more” requests broke down further by genre, audience, and format:

| | |
|---|-----|
| • Books (paper) - specific genres, audiences, “new” | 28% |
| • Other materials - specific DVD’s, cassettes, etc. | 20 |
| • “More” books | 21 |
| • “More” other materials | 31 |
- Less experienced patrons reported more orienteering-related issues, affecting:
 - Newest patrons, cards < 1 year - 13% of those surveyed
 - Infrequent visitors, < 1x/month - 22%

- Disengaged patrons can't find the staff
- All patrons need to be made aware of upcoming changes in open hours and need consistent education on (or reminders of) KCLS policies (esp. cell phone use)

FAQ's were mainly orienteering-related, probably coming from newer patrons.

Locating the collection

"Where is ..."

- Reference: Value line, phone books, atlases, dictionary
- Books: romances, woodworking, Belgium, etc
- ESL: bi-lingual dictionaries, language tapes, world language materials
- DVD's, Books on Tape, Comics, Magazines
- Do you have a list of DVD's and videos
- Any books about _____? (less frequent)
- Where is the children's/teen section
- I have the call number, now what

Locating services

"Where are ..."

- Holds, DVD Holds
- Computers, signup sheets, printers.
- Office: copier, phone, mail box, scanner, fax
- Restrooms, conference rooms
- The "card catalog", where to look up books
- Tax forms, tax help

Procedures

"How do I ..."

- Look up books
- Various help questions for using the computer and the internet
- Would you place these on hold for me
- Check out

Policies

- How late are you open
- Do I need to return materials to this branch
- Can I use my Seattle card here

ESL patron related

- Complicated questions, about citizenship etc., requiring someone fluent in the patron's language
- Requests for bi-lingual or world materials

Staff Observations in KCLS Branches

- Patrons don't see what's now in the transition zone (lobbies/foyers and first few feet inside the library - exact point of pause varies with branch layout)
 - ✓ Missing library notices, tax information, book return
- Many patrons clearly know their way around, and are on a mission
 - ✓ Book return, holds, drop their kids ... then browse ... could this be a natural traffic path?
 - ✓ Traffic flows to the right
- Points of puzzlement (P.O.?.) include:
 - ✓ Before patrons get to the library
 - What does KCLS offer
 - How to "join" KCLS
 - ✓ Outside the entry
 - How to find KCLS
 - Open hours
 - ✓ Foyer
 - ✓ Just inside (6 - 15' depending on branch size, layout)
 - ✓ At the holds area (where are the DVD's?)
 - ✓ At the catalog area (how to look up a book)
 - Dewey decimal v. Google thinking
 - ✓ Just after looking up a book
 - How to interpret call #s
 - ✓ At the computer/printer area
 - How to sign up
 - How to use ... (see FAQ's)
- Patrons show confusion when ...
 - ✓ Something has moved or changed
 - especially for regular patrons
 - ✓ Something is in a different place from the branch they are used to
 - ✓ Computer signup sheets/instructions aren't near the computers.
- Patrons gravitate to the first available desk for help regardless if they can see the information desk further away
- Signage is missing in action
 - ✓ No signs for meeting rooms (e.g., Federal Way 320)
 - ✓ Tax information/signs missed in the foyer (e.g., Kingsgate)
 - ✓ Signs obstructed (e.g., Federal Way Regional)
 - ✓ Too many signs
 - ✓ Signs blend in with the background ("too tasteful")
 - ✓ Unreadable (font size, contrast) from likely viewing point, or not scaled to the building in which it is posted

Objectives:

The problems KCLS believes physical way-finding must help address are listed below. These affect all patrons to some degree, but especially those who are newer to KCLS or who use it less frequently.

Many issues are interrelated. Most must be addressed by a combination of patron education/marketing communications, staff service, and/or IT in addition to physical solutions. For example, perceived lack of variety and choice in the collection is affected by awareness of what's available, ability to use the computer systems to search for materials, ability of staff to help find materials or recommend alternatives, as well as how the collection is physically laid out and merchandised.

Top tier

Improving awareness of products and services offered by KCLS.

Of these, learning what's in the collection is most important, but other related priorities include improving awareness of:

- Reading programs and existence of suggested reading lists
- Kcls.org (this question wasn't asked in the survey but could be an issue)
- The existence of a holds system that can request books not available at the branch
- Self Check Out
- Self Check In (when it is offered)

Improving *perceived* variety and choice in the collection.

Many patrons do not currently use the holds system or browse the catalog online and therefore miss seeing the most popular books/materials which are in constant circulation; others don't realize that KCLS can get books/materials from other libraries in the system. Still others would like easy ways to know what's available at their branch and would like lists/staff suggestions, e.g., what DVD's are available (format), recommended new mysteries (genre), or recommended books for kids or teens (patron type). While most patrons browse on their visits, KCLS can do more to display and merchandise the permanent collection in ways that enable patrons to easily find materials of interest to them.

Finding materials. KCLS was obliged to switch to a new IT system which many patrons find less intuitive than the previous version. Patrons need to know how to:

- Use the hold system from within the library or via kcls.org
- Use the on-line databases
- Search the catalog
- Request a book or material from another branch
- Find a staff person when they need recommendations or would prefer personal service

Communicating (v. enforcing) policies is a form of psychological way-finding, helping to make patrons more comfortable because they know what they can expect of the staff, and what is expected of them:

Cell phone policies. KCLS has not consistently enforced a cell phone policy in the past. In response to patron demand, KCLS has decided to implement a consistent policy system-wide. KCLS needs to communicate where patrons are welcome to use cell phones.

Open hours. KCLS has varying open hours by branch, and changes them in response to patron demand and staffing availability. KCLS needs to make it easy for patrons to know when their branch is open (ideally via kcls.org or driving by), and to make patrons aware of opening hours and locations for nearby branches which may be open when their regular branch is closed.

Procedures & Policies. Address frequently asked questions at the appropriate point of puzzlement, such as how to use the catalogue, computer signup/use, how to use etc. New patron orientation (how to get a library card, pin number, etc) would also need to be addressed. The holds privilege for Seattle residents is about to be eliminated, and must be communicated.

Reorient patrons to changes to the buildings. With every remodel (or change in layout), patrons need to be re-oriented to where things are in the branches. This particularly affects experienced patrons, like the KCLS Regulars, who have gotten used to the old layouts.

Improving functionality of the kcls.org site. While not specifically addressed by this RFP, KCLS' IT department is addressing specific patron suggestions on usability, but recognizes there is also an opportunity to use the site to help patrons orient to KCLS in advance of visiting: learning about what each library has and where to find it (maps, descriptions of the collections, descriptions of services, etc.), what events are offered, and giving them the opportunity to browse ahead of time.

Second Tier (affect fewer patrons, but still important)

These issues most directly affect newer patrons, but can also include patrons coming to an unfamiliar branch, or whose needs/interests change (e.g. new parents needing access to the children's collection for the first time). Solutions that make it easy for less experienced users will, of course, also benefit regular patrons.

Locating the collection. Less experienced users don't know where generally in the stacks to find the subjects of interest to them.

Locating services. Less experienced users don't know where important services can be found, such as the DVD Holds area.

ESL info/help. An estimated 10% of KCLS patrons speak another language than English - over 80 languages are reported spoken by those patrons who were able to complete the PETP survey in English. While many are proficient in English, there can be cultural barriers to accessing all the KCLS offers (e.g., not having access to libraries in their home country). Furthermore, KCLS recognizes other ESL patrons, unless they find a member of the staff who speaks that language, are unlikely to be able to make use of KCLS' resources.

Strategies:

KCLS understands that a comprehensive solution is needed to address patron way-finding needs. Strategies include:

- **Staff** should always be the first point of contact in a branch, and are key to supporting physical way-finding solutions.
- **More intuitive layouts** will help newer patrons (in particular) orient to their surroundings and provide a better experience for all.
- **Merchandising** the collection will help everyone since people already understand how to browse from shopping in retail situations, and a high percent of all patron segments browsed on their last visit.
- **Signage** would support layout and merchandising.
- While not specifically included in this RFP, **kcls.org** can assist patrons with pre-planning.

Hypotheses:

- Add library layouts and virtual tours to the site
- Add content to help ESL patrons understand what KCLS offers to them?

Considerations

KCLS serves a very diverse population. Physical way-finding must address the needs of patrons who have varying familiarity with the library system, ages, physical abilities, socio-economic backgrounds, and literacy and English proficiency.

KCLS operates as a system, with 43 library branches of varying sizes and purposes. Physical way-finding must address the needs of individual branches and be consistent, but not identical, system-wide. E.g., signs might have the same color/graphic treatment, but be sized and located to fit the layout of the local branch.

While this RFP focuses on enhancing physical environment, improving physical way-finding must also happen within a larger context. Solutions must support the larger "gold standard" experience.