Santa Cruz Public Libraries
Facilities Master Plan 2014-2023

Final Report 2013-03-28

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EXECUTIVE SUMMARY

The Santa Cruz Public Libraries (SCPL) system enhances the quality of life in the community by providing vibrant physical and virtual public spaces where people connect, discover, and engage the mind, as evidenced by SCPL's Statement of Purpose: "Connect, Inspire, Inform." In 1996, the Library was formed as a special district governed by a Joint Powers Authority (JPA) and a nine member Library Joint Powers Board (LJPB). SCPL serves a population of more than 200,000 residents located in all urban, suburban and rural areas of Santa Cruz County except Watsonville.

In 2012, SCPL initiated a master planning process to create modern library facilities that provide modern library service. Objectives of the master plan included implementing SCPL's new service model, identifying strategies to prepare facilities for the future, and creating a foundation for proactive capital maintenance over the next decade. SCPL selected a consultant team led by Group 4 Architecture, Research + Planning, Inc. (Group 4), a firm with experience helping libraries nationwide develop sustainable service and facility plans. Concurrent with the development of the new facilities master plan, SCPL also commissioned a separate consultant to develop a library technology plan.

"Connect, Inspire, Inform"
— Santa Cruz Public Libraries
Statement of Purpose

STATE OF THE LIBRARY

The Library operates 10 branch libraries, a bookmobile, and a headquarters facility that work together as an integrated system sharing collections, virtual resources, programs, administration, and more. Other recent planning work by SCPL confirmed that this current network of libraries will be maintained without adding, consolidating, or eliminating facilities in any communities. Therefore this master plan addresses facilities within this system network.

SCPL's individual facilities vary greatly in age and size as well as in how well they support modern library service. On average the Library's buildings are 40 years old, and many were built before the Library JPA was formed 17 years ago. Insufficient funding and maintenance staff resources over the years have led to a significant backlog of deferred maintenance projects at many of the facilities.

More than half of the buildings have not been significantly renovated since they were built – let alone since the recent adoption of SCPL's new service model. Systemwide, SCPL lacks appropriate facilities for library programs, computer training, and other core library services. And several of SCPL's libraries are serving a high number of customers out of a disproportionately small amount of space – a deficit that will only increase as the population of Santa Cruz County continues to grow in size and diversity.

EXECUTIVE SUMMARY

SUMMARY OF RECOMMENDATIONS 2014-2023

This master plan recommends three general categories of capital projects at SCPL libraries over the next decade.

- The Maintain plan is a proactive Capital Maintenance Plan (CMP) for SCPL's current library facilities. The Maintain plan is not a mandate, but rather a tool for allocating staff and budget resources for replacement of building components at specific intervals according to industry standards for expected service life. On a year to year basis, SCPL staff may accelerate or defer projects based on actual conditions, opportunities for cost savings by bundling projects, or other factors. SCPL may also opt to replace outdated components with new systems and materials that improve the buildings' energy efficiency and environmental footprint. From a library service perspective, the CMP merely maintains the status quo; it does not propose any changes that would improve a building's capacity to serve as a library.

- The Gain plan is designed to improve how SCPL's current buildings support the new service model. Building on the improvements in the Maintain plan, the Gain plan improves customer access to power and data, consolidates staff service points, increases customer self-service opportunities, and enhances access to the collection. Gain plan projects do not address current space deficiencies or build capacity for the future.

- The Attain plan builds SCPL's capacity to serve the community by replacing undersized and/or outdated facilities with modern libraries that provide modern library service. The Attain projects will have systemwide benefits, adding space and technology for collaborative work, study, and social activities for all ages.

The recommended plan (Maintain + Gain, and/or Attain) for each individual SCPL library is shown in the following summary matrix, along with master plan-level project budgets. These project budgets anticipate construction costs, soft costs (such as engineering fees and construction management) and contingencies, but do not include escalation, hazardous materials abatement, temporary library facilities, or other elements that will need to be identified in subsequent planning and design tasks.

NEXT STEPS

The LJPB will evaluate funding strategies and develop phasing priorities for the master plan-recommended projects. The next phases of planning for individual projects will confirm project scope, develop design concepts, and refine project budgets.

Santa Cruz Public Libraries
FACILITIES MASTER PLAN 2014–2023

	Aptos	**Boulder Creek**	**Branciforte**	**Capitola**	**Downtown**	**Felton**
	Built 1975 8,000 SF Owner: Santa Cruz County	Built 1984 4,600 SF Owner: Santa Cruz County	Built 1967 7,500 SF Owner: City of Santa Cruz	Built 1999 4,320 SF Owner: City of Capitola	Built 1968 44,000 SF Owner: City of Santa Cruz	Built 1893 1,250 SF Owner: Belardi Trust

RECOMMENDATIONS

	Aptos	Boulder Creek	Branciforte	Capitola	Downtown	Felton
Maintain — *Capital Maintenance*	$1.8 million (if existing building is retained)	$1.3 million	$1.1 million	$ 368,000 (only short-term critical projects until replacement building is completed)	$8.2 million (if existing building is retained)	$55,000 (only short-term critical projects until replacement building is completed)
Gain — *Service Model + Sustainable Energy*	$450,000 to $700,000 • Service model upgrades • Improve meeting room flexibility • Option: alternative energy • Option: automated materials handling	$325,000 to $575,000 • Service model upgrades • Option: alternative energy • Option: automated materials handling	$325,000 to $575,000 • Service model upgrades • Options: redesigned teen space; new group study space • Option: alternative energy • Option: automated materials handling	UNTIL	$ 1.4 to $1.9 million • Service model upgrades • Options: new teen space; new computer lab • Option: automated materials handling • Option: alternative energy	UNTIL
	OR				OR	
Attain — *Building Capacity*	$7.6 to $13.4 million • Renovate/expand or replace at 11,000 to 16,000 SF			$10.2 to $12.9 million • Replace at 12,000 to 15,000 SF	$24.9 to $35.6 million • Renovate or replace at 44,000 SF (current size)	$8.6 million • Replace at operationally efficient size up to 9,300 SF
Total Recommended Project Budget	Gain + Maintain: $2.2 to $2.5 million OR Attain: $7.6 to $13.4 million	Gain + Maintain: $1.6 to $1.8 million	Gain + Maintain: $1.5 to $1.7 million	Attain: $10.2 to $12.9 million	Gain + Maintain: $9.6 to $10.1 million OR Attain: $24.9 to $35.6 million	Attain: $8.6 million

Santa Cruz Public Libraries
FACILITIES MASTER PLAN 2014–2023

	Garfield Park	**La Selva Beach**	**Live Oak**	**Scotts Valley**	**Headquarters**
	Renovated 2002 2,343 SF Owner: City of Santa Cruz	Built 1975 2,200 SF Owner: LSB Recreation District	Built 2006 13,500 SF Owner: Santa Cruz County	Built 2011 13,150 SF Owner: City of Scotts Valley	Built 2008 13,800 SF Owner: City of Santa Cruz
Maintain *Capital Maintenance*	$323,000	$258,000	$1.1 million	$954,000	$724,000
Gain *Service Model + Sustainable Energy*	$125,000 • Service model upgrades • Option: alternative energy	$250,000 • Service model upgrades • Option: alternative energy	$325,000 to $575,000 • Service model upgrades • Option: create program space • Option: automated materials handling • Option: alternative energy	$50,000 to $300,000 • Sound attenuation system • Option: automated materials handling • Option: alternative energy	
Attain *Building Capacity*				$4.4 million • Expand into rest of building	
Total Recommended Project Budget	Gain + Maintain: $448,000	Gain + Maintain: $508,000	Gain + Maintain: $1.5 to $1.7 million	Gain + Maintain + Attain: $5.4 to $5.6 million	Maintain: $724,000

RECOMMENDATIONS

SCPL PLANNING HISTORY

SCPL has commissioned a number of planning studies in recent years. A facilities master plan completed in 2009 identified significant short-term improvement needs at most facilities – ranging from capital maintenance projects to interior remodels – as well as long-term goals to expand or build new libraries. One of the recommendations was an expanded Scotts Valley Library, a project realized in 2011 through partnership between SCPL and the City of Scotts Valley. However, primarily due to the downturn in the economy, few of the other recommendations of SCPL's 2009 facilities master plan were realized.

In 2010, SCPL published its 2010-2015 Strategic Plan in which it confirmed strategic directions including Reading, Viewing, and Listening for Pleasure; Lifelong Learning; Community Connections; Financial Sustainability; Organizational Readiness; and A Welcoming Place. The Strategic Plan was developed through a highly participatory process that engaged the community through a countywide survey, town hall-style meetings at each library, and focus groups with senior citizens, homeschooling families, the homeless, the business community, and Bonny Doon residents.

Also in 2010, in response to the challenging financial climate in recent years, SCPL assembled a Task Force to examine options for a more fiscally sustainable service model. The LJPB subsequently confirmed that SCPL will continue to operate its current libraries, without either adding or eliminating any branches. SCPL developed service model strategies to improve service within its reduced budget, restore open hours in current facilities, create a sustainable cost plan with increased reserves and funds for capital maintenance, and rebalance expenditures. The new service model emphasizes operational efficiencies through strategies such as consolidated service points, improved customer self-service opportunities, a floating collection, and improved technology for customers and staff.

INTRODUCTION

PROJECT METHODOLOGY AND PARTICIPATION

This facilities master plan project was completed over an eight month period from August 2012 to March 2013. Data gathering included review of documents for each of SCPL's current facilities, such as building plans and maintenance/service records, as well as demographics, former SCPL planning studies, and other information provided by SCPL.

Together with Group 4's project team, SCPL's leadership team formed the core Project Management Team (PMT) for the master plan. The PMT met as a group eight times over the course of the project to review project progress and provide project direction.

The consultant team met twice with department heads and staff representatives from the County as well as from the cities of Santa Cruz, Capitola, and Scotts Valley to review and confirm project findings and recommendations. Early in the project, Group 4 conducted a focus group with representatives of the Friends of the Library. Group 4 also presented the project twice to the Library Joint Powers Board: once to confirm project goals, and again later to present findings and recommendations.

Individual project participant names and members of the consultant team are listed in the Acknowledgments section of this report.
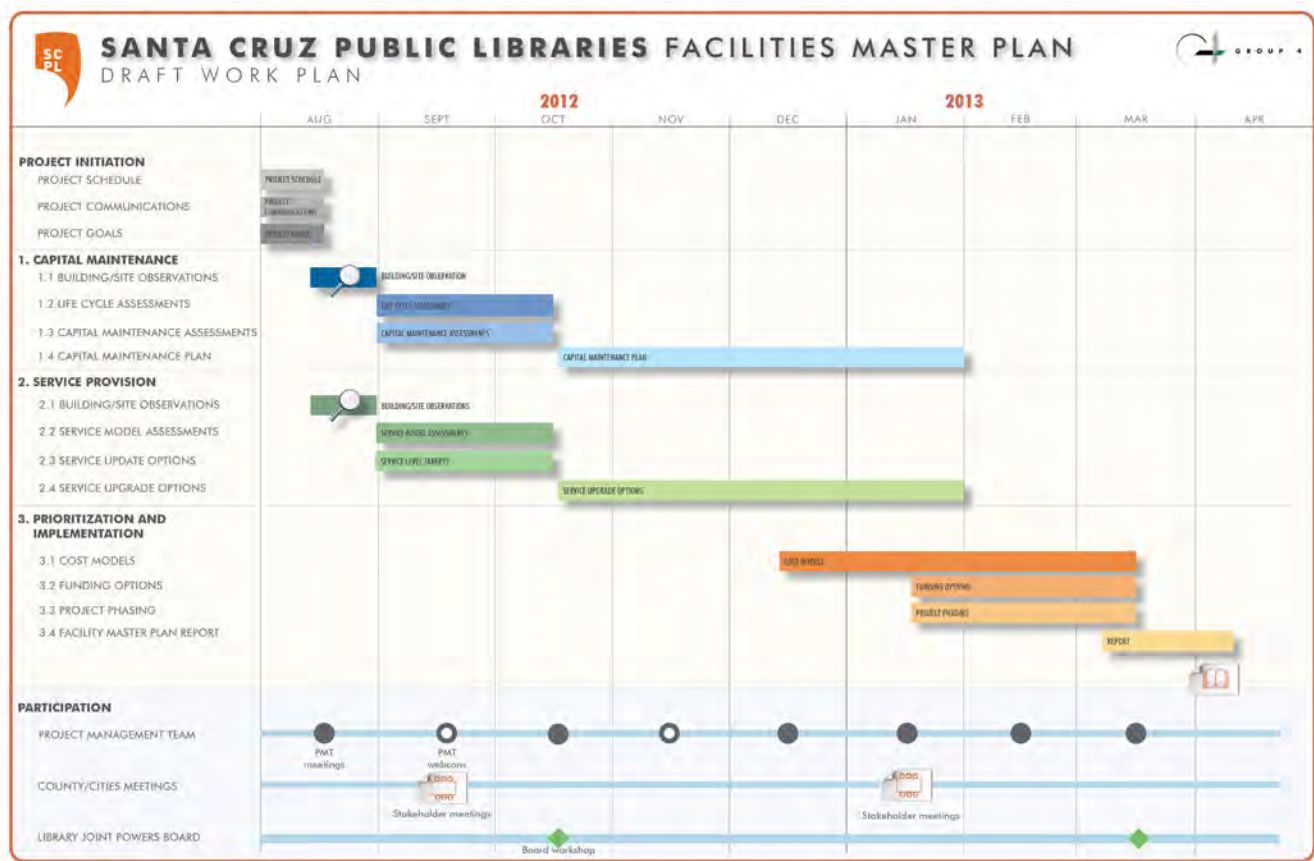
21ST CENTURY LIBRARY VISION

In 2011, in response to economy-driven budget reductions as well as the LJPB's re-dedication to maintaining the current network of library facilities, SCPL developed a new community service model designed to increase open hours, build a sustainable cost structure with appropriate contingencies and reserves, rebalance the cost of materials within overall expenditures, and upgrade technology to meet modern library standards and adapt to future needs. In addition to organizational changes and new policies such as floating collections, the new service model recommended both customer-side and staff-side facility improvements intended to increase operational efficiency and enhance public library service.

But the implementation of self-checkout stations and consolidated service desks does not adequately reflect the whole vision for SCPL's libraries. The Library's Strategic Plan 2010-2015 confirmed "A Welcoming Place" as a core strategic direction – providing comfortable, welcoming, and customer-focused spaces that deliver a 21st century library experience.

Within the SCPL system, the new Scotts Valley Library best reflects both the new service model and the vision for the future. Upon entering the library, customers find a bright, open, and highly legible building that provides a variety of settings for individual and collaborative work, study, and activities. The collection is open and browsable, offering materials in retail-style shelving that can easily accommodate curated and themed displays. Teens have a distinct place of their own, separate from children

"Fully 91% of Americans ages 16 and older say public libraries are important to their communities; and 76% say libraries are important to them and their families."
— Pew Research Center,
Library Services in the
Digital Age (2013)

LIBRARY VISION

and adults. The meeting room is flexible, and can easily be set up as overflow work and study space when not in use for programs, such as after school.

"… our research suggests there is a strong correlation between the condition of branches and the number of people using them."
— Center for an Urban Future, Branches of Opportunity (2013)

The Scotts Valley Library also reflects the vision of how modern library facilities encourage and increase library use by all segments of the community. Today it is the second-highest circulating branch in the SCPL system and bustles with activity throughout the day. This phenomenon has been experienced by libraries nationwide who have modernized their facilities. Aging and outdated libraries have a depressive effect on use, turning away as many (or more) customers as they serve. By contrast, attractive facilities draw a much larger – and more diverse – customer population.

SCPL's Vision Statement is "Transform lives and strengthen communities." In addition to its strong vision of a vibrant future for residents of Santa Cruz County, SCPL also has a clear commitment to strengthening the community by maintaining links to its past. SCPL is an important portal for the community to learn about its shared history, actively collecting, preserving, curating, and providing access to local history documents, archived photographs, and genealogy reference materials. The lion's share of the local history collection is located centrally at the Downtown Library, along with the music collection, back issues of newspapers and periodicals, and other systemwide collection resources. This core service is at the heart of SCPL's vision, and will continue to be an important resource for the community in the future.

STATE OF THE LIBRARY TODAY

SCPL's facilities represent a wide range in terms of age, condition, and how well they support SCPL's vision of library service. SCPL's newest facilities are the Scotts Valley Library, which opened in 2011; its headquarters, built in 2008; and the Live Oak Branch, which opened in 2006. At the other end of the spectrum are the Felton Library – which operates in a church building that in 2013 is celebrating its 120th birthday – and the Carnegie-era Garfield Park Library. In the middle of the range are the Branciforte, Aptos, La Selva Beach, Downtown Santa Cruz libraries, built in a Santa Cruz County "boom" in library construction between 1967 and 1975. The Boulder Creek Library was added in the 1980s. The current Capitola Library was established in 1999 in a facility meant to be temporary.

FACILITY ASSESSMENTS


Percent of total SCPL checkouts*

Capitola 8%
Downtown 35%
Aptos 15%
Live Oak 12%
Scotts Valley 18%
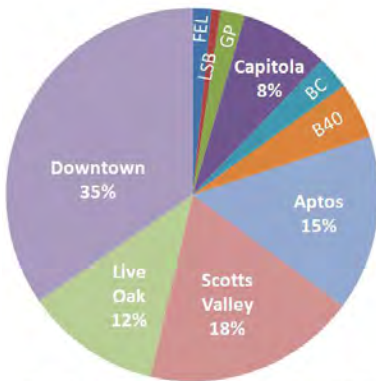
Based on checkouts by branch, July-Sept. 2011
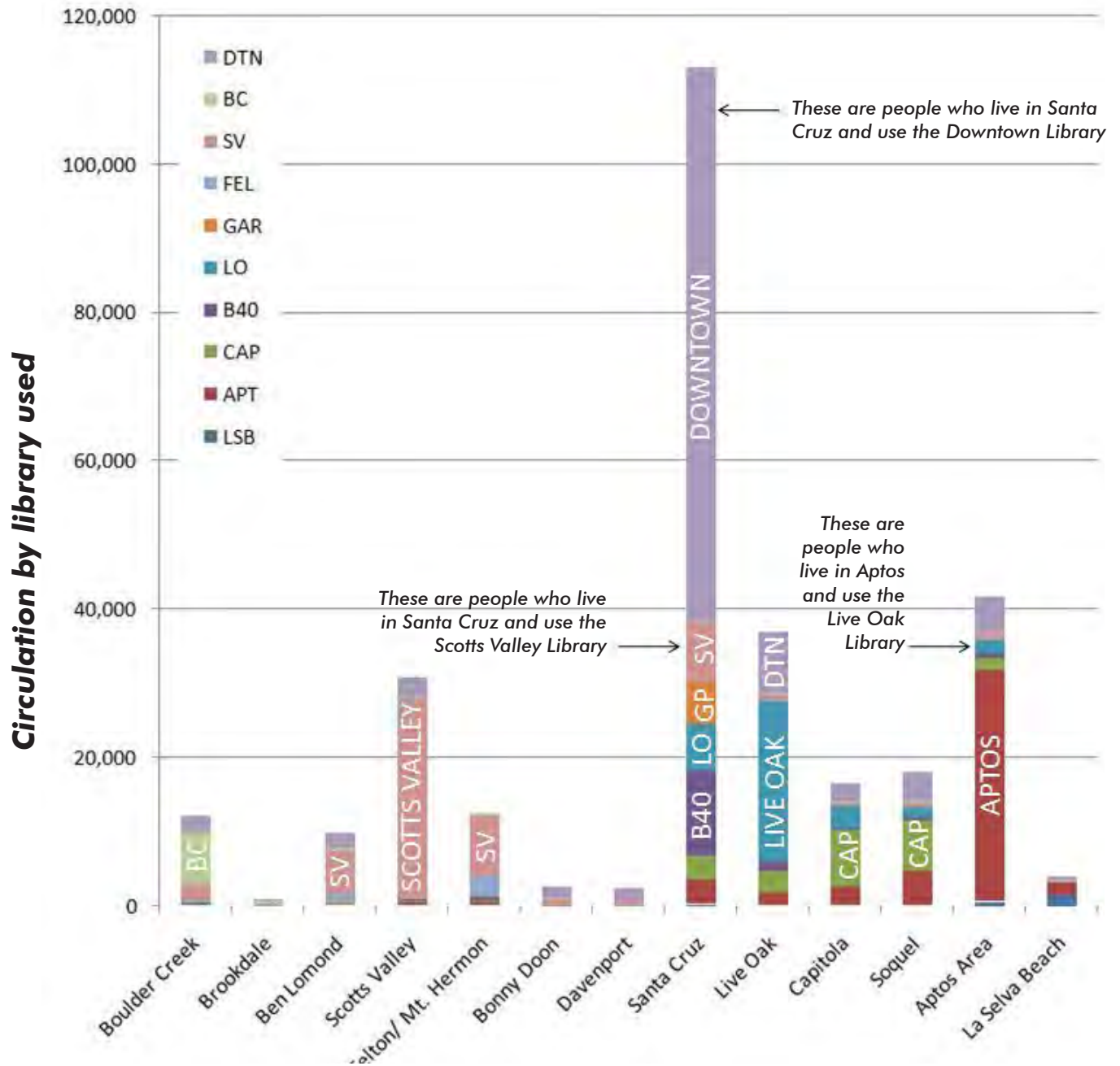

PATTERNS OF LIBRARY USE

A key analysis in the development of the master plan was an examination of how Santa Cruz County residents currently use their libraries. Analysis of one year of circulation data between July 2011 and June 2012 revealed that in the SCPL system, 80% of all materials are checked out of four libraries – Downtown, Scotts Valley, Aptos, and Live Oak. Downtown and Live Oak both circulate materials roughly in proportion to the amount of space in their facilities relative to total space in the SCPL system; Downtown circulates 36% of all materials and has approximately 35% of SCPL's total square footage, while Live Oak circulates 11% of materials in approximately 13% of SCPL square footage. The other two libraries account for a disproportionately high level of circulation relative to their building size; Scotts Valley circulates 17% of all materials in 13% of the space, while Aptos circulates 16% of materials out of just 8% of the space. Capitola, the fifth-highest circulating library in the SCPL system, circulates 7% of SCPL's materials in just 4% of its library space.

SCPL also periodically compiles data comparing where customers live with where they check out books. SCPL provided a set of data collected over three months in 2011, following the opening of the new Scotts Valley Library. Findings from this data set include:

- SCPL's customers do not only use the library nearest to their residence, but rather travel to the library that best meets their needs. During the data collection period, there were Ben Lomond residents who checked out materials from the La Selva Beach Library, Scotts Valley residents who visited the Aptos Library, and Santa Cruz residents who made the trip up to Boulder Creek.

- The Downtown Library is a countywide resource. Residents of every community in Santa Cruz County – from Davenport to Brookdale to Corralitos – regularly make the trip to the Downtown Library to check out books, study, participate in programs, get tutoring and literacy help, and visit the Friends of the Library bookstore.
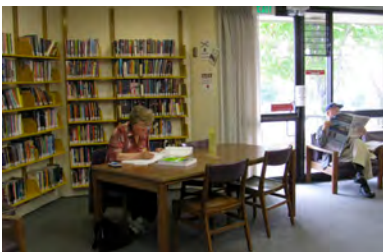
The highly mobile lifestyle that Santa Cruz County residents lead and their willingness to travel means that improvements in individual libraries will have systemwide benefits. Although there are opportunities to make improvements at each SCPL library, not every facility needs to be expanded; instead, capacity added strategically at certain libraries will help alleviate the pressure on the others (as well as on themselves). Similarly, the addition of program space in some libraries will increase the availability of library programs and events for all communities in the county.

Circulation by library used

Legend:
- DTN
- BC
- SV
- FEL
- GAR
- LO
- B40
- CAP
- APT
- LSB

These are people who live in Santa Cruz and use the Downtown Library

These are people who live in Santa Cruz and use the Scotts Valley Library

These are people who live in Aptos and use the Live Oak Library

X-axis categories: Boulder Creek, Brookdale, Ben Lomond, Scotts Valley, Felton/ Mt. Hermon, Bonny Doon, Davenport, Santa Cruz, Live Oak, Capitola, Soquel, Aptos Area, La Selva Beach

Y-axis: 0, 20,000, 40,000, 60,000, 80,000, 100,000, 120,000

Where customers live
Based on checkouts by branch, July-Sept. 2011

FACILITY ASSESSMENTS

Branciforte Library

Buildings have a finite life expectancy. Their longevity is affected by factors such as the quality of their original construction and materials; environmental conditions; types and patterns of use; and level of maintenance. Even under optimal conditions, however, most building systems and components will eventually need to be replaced.

Live Oak Library

SCPL'S CURRENT CAPITAL MAINTENANCE PROGRAM

SCPL does not own any of its facilities. Except for the La Selva Beach and Felton libraries, SCPL leases its facilities from its member cities or the County. According to the terms of each lease, SCPL is responsible for nearly all capital maintenance.

SCPL hires outside contractors to complete larger projects and/or perform more specialized work (such as HVAC maintenance, electrical work, and elevator repair). The rest of its maintenance projects are performed by SCPL's own crew of three full-time maintenance workers. The crew has a small office on the second floor of the Downtown Library, but for all intents and purposes each maintenance worker operates out of his van. They do not have a dedicated shop in which to work or space for storing specialized equipment, which limits the type of work they can perform and requires some duplication of equipment among the three vans. The maintenance crew also lacks dedicated storage for supplies, which prevents SCPL from taking advantage of discounts that may be available through bulk purchasing. Additional challenges for the maintenance crew include the addition of landscape maintenance for two branches to their workload, and the elimination of SCPL's in-house custodial crew (who also used to assist with minor maintenance problems).

To date, SCPL's approach to scheduling capital maintenance projects has been almost entirely reactive. During development of the annual budget, branch library staff are asked to identify maintenance projects at their facilities that they feel should be addressed in the upcoming year. These projects are then prioritized by SCPL administrative staff within the context of the annual budget allocation for capital maintenance – which in recent years has been much lower than would normally be expected for a library system of SCPL's size and building inventory. For other maintenance needs that arise during the course of the year, SCPL must either defer other projects on the original list, or use budget contingency funds.

A more proactive capital maintenance approach would schedule maintenance projects based on criteria such as the anticipated life cycle of building materials and systems. Taking care of maintenance needs on a regular schedule not only allows for better allocation of budget and maintenance resources, but also reduces the interruptions in library service that can occur when materials and systems fail. However, the realities of SCPL's limited maintenance budget and staff resources have made it practically impossible to develop and implement a proactive capital maintenance plan. Most projects are done essentially on an emergency basis, with even the squeakiest wheels only getting the grease when they are in imminent danger of falling off entirely.

FACILITY CONDITION ASSESSMENTS

Group 4's project team toured each of SCPL's current facilities with SCPL administrative and maintenance staff, observing the current physical condition of the facilities as well as service and operational elements. In addition to the information gathered through the facility tours, the facility condition assessments were based on a combination of interviews with SCPL staff and review of available building plans and other documentation. Structural engineers Fratessa, Forbes & Wong conducted more detailed review of facility documentation for the Aptos Library and the Downtown Library.

Santa Cruz County residents love their libraries, and it shows in the condition of the buildings and their systems, materials, and finishes. The facilities have been kept clean and reasonably well maintained, but years of heavy use by the community has resulted in visible wear and tear in all but the newest buildings.

Inconsistent planning and insufficient budgeting for capital maintenance over the years has led to a backlog of deferred maintenance needs, such as:

- Building systems and materials at many libraries that have served beyond their anticipated useful life and are overdue for replacement;

- Gaps in ADA accessibility, from non-compliant restrooms to major barriers in paths of travel; and

- Dated furniture and finishes that show signs of significant wear.

It should be noted that a full ADA accessibility survey was beyond the scope of this master plan study. Although some of the assessment findings are accessibility-oriented, the consultant team did not do an exhaustive study of accessibility conditions at any of the libraries. As such, this assessment should not be considered a complete inventory of accessibility deficiencies at any of the facilities. A separate specific study of this issue is recommended.

The consultant team also did not directly observe the roofs of the existing buildings. SCPL may wish to commission a specific roof condition study.

Garfield Park Library

"Reader chairs receive more use and abuse than any other piece of furniture in the library. They seem to present a challenge to patrons who have discovered many creative ways to occupy them."
— Carole Graham & Linda Demmers, Furniture for Libraries (2001)
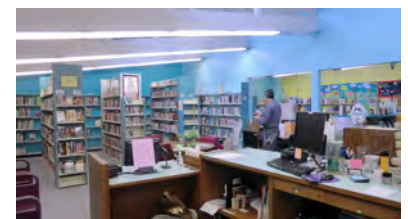
La Selva Beach Library

FACILITY ASSESSMENTS

Friends Store
Downtown Library

LIBRARY SERVICE ASSESSMENTS

The service assessments looked generally at the extent to which SCPL's new service model has been implemented at each facility – for example, how the staff service desks, material holds shelves, and self-checkout units are configured to either support or discourage customer self-service. Opportunities to implement (or improve) elements of the service model were identified according to the following categories:

- Customer amenities and staff operations – consolidated staff service desks, more prominent self-service features, "marketplace"-style display of materials for improved browsability, and selected other improvements at selected libraries;

- Technology – power and data enhancements based on the findings and recommendations of SCPL's separately-commissioned technology plan; and

- Automated materials handling – adding automated materials handling (AMH) systems at selected libraries as appropriate based on circulation levels as well as the ability of the building to accommodate the technology.

SCPL's facilities are also showing their age in terms of their ability to support modern library service. With the exception of Scotts Valley, all of SCPL's facilities were designed according to a 20th century vision of library service oriented around staff-mediated access to the collection.

- Most of SCPL's facilities still have shelves that are tall, full, and difficult to browse.

- Although self-check units have been added at all of the libraries, many customers bypass them in favor of the large service desks, where staff feel tethered to transactional circulation tasks rather than moving out onto the library floor to provide customized services. Even Live Oak, which is less than 10 years old, has multiple large staff desks that are inconsistent with SCPL's new service model.

- Live Oak and Scotts Valley are the only libraries in the system built in anticipation of the current proliferation of laptops and other technologies that require increased customer access to data and power.

- Few of the facilities provide space for programs, meetings, and collaborative work.

- Few of the libraries offer dedicated space for teens.

Downtown Library

CAPACITY AND FUTURE ADAPTABILITY

The service assessment also looked broadly at the capacity of SCPL's facilities to meet community needs, both now and in the future, and identified libraries that are simply too small and/or too outdated to adequately serve the community.

Felton Library

- The Felton Library's current building – a 1,250 square foot historic church – cannot even be renovated to support modern library service, let alone expanded to meet community demand. It is highly likely that the current building discourages many Felton community members from using the library. A more appropriate permanent home for the Felton Library is long overdue.

- The Capitola Library was established in 1999 in a modular building intended as a temporary facility; however, more than a decade later, the modular building is still in use. Approximately 7% of all materials checked out of the SCPL system are checked out from the Capitola Library, which provides only 4% of the total amount of library space systemwide. The modular building cannot reasonably be either upgraded or expanded to serve as a permanent facility, and should be replaced.

In addition, several facilities are insufficient to meet current community demand, and will be even more hard-pressed to serve as the population continues to grow.
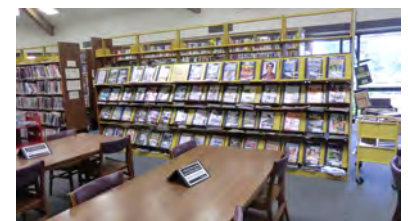

Capitola Library

- The Aptos Library is SCPL's third highest circulating library, with Aptos customers accounting for 16% of all materials checked out systemwide. However, the Aptos Library only provides 8% of the library space overall in the SCPL system.

- The Downtown Library is appropriately sized overall, with a proportionate amount of space relative to its circulation level. However, the Downtown Library serves even more visitor traffic than it circulates materials. In addition to programs and materials to serve the local community, the Downtown Library houses systemwide resources such as the music collection, the local history materials, genealogy resources, and back issues of periodicals as well as SCPL's Information Technology department and central materials routing. The Downtown Library is also the center of operations for the Friends of the Santa Cruz Public Libraries, including its main Friends store and office as well as storage and sorting space. With recent changes such as moving SCPL's Technical Services to the Headquarters building across the street, it is likely that some of the back-of-house space could be recaptured for public use, such as to create dedicated space for teens (who currently are allocated a small corner upstairs in the children's library).

Aptos Library

RECOMMENDATIONS

MAINTAIN	**GAIN**	**ATTAIN**
Capital Maintenance	Service Model Upgrades	Building Capacity
- Keep existing facilities open	- Improve service and operations in existing facilities	- Accommodate current and future needs
- Deferred maintenance and life-cycle renewal projects	- New service model, increased self-service, improved customer and operational technologies	- Address space deficits
- **Status quo – MAINTAIN projects do not address library services, operations, or capacity**	- **GAIN projects do not expand capacity**	- Replace temporary and outdated facilities
		- **ATTAIN projects improve service and build capacity for the future**

RECOMMENDATIONS OVERVIEW

This master plan developed three categories of recommended improvements for SCPL's facilities. Although some facilities are proposed to have multiple categories of improvements, the categories have been developed to be exclusive, without overlap or duplication of elements between them. These master plan categories and their associated overall project budgets are summarized in this section. The next chapter includes specific master plan-recommended projects and project budgets for individual SCPL facilities.

MAINTAIN PLAN PROJECTS

The Maintain plan recommendations are focused on the physical conditions of SCPL's existing facilities – addressing deferred maintenance needs and developing a proactive plan for capital maintenance projects over the next decade. The Capital Maintenance Plan (CMP) does not address routine maintenance, such as periodically changing light bulbs and air filters. Rather, the CMP is intended to replace building systems, materials, and furniture "in kind" as they reach the end of their expected useful lives.

From a library service perspective, the CMP merely maintains the status quo; it does not propose any changes that would improve a building's functionality or its capacity to serve as a library. However, when implementing CMP projects, SCPL could opt to replace the current systems, finishes, and furnishings with alternatives that also achieve other goals, such as improved energy efficiency, different furniture types, and more up-to-date aesthetics.

GAIN PLAN PROJECTS

Improvements in the Gain category are focused on improving the ability of each building to function as a library and to support SCPL's new service model. Coordinated with the improvements in the CMP, the Gain plan includes elements such as increasing customer access to power and data; consolidating staff service points and increasing customer self-service opportunities; and enhancing access to new and popular collection materials. The Gain plan also proposes that SCPL consider adding automated materials handling (AMH) at libraries where circulation levels could make it a worthwhile investment. Gain plan projects do not build capacity to address current space deficiencies or future population growth.

ATTAIN PLAN PROJECTS

The Attain plan recommends improvements at selected libraries to address the most severe deficits in facility condition and to build capacity to serve the community. The Attain projects will have systemwide benefits, adding capacity not only for the collection, but also for seating, technology, and space for collaborative work, meetings, and programs for all ages. These projects will help SCPL meet the needs of the current population – which has grown and shifted dramatically in the years since these libraries were first constructed – and to accommodate the added population growth expected in Santa Cruz County in the future.

PROJECT BUDGETING METHODOLOGY

Budgets for the master plan-recommended projects are based on per-square-foot cost inputs that were reviewed and confirmed by Bogard Construction Inc., a Santa Cruz-based company that has provided construction, project management, and cost estimating services in the community since 1947. The goal for developing project budgets was to be comprehensive, including:

- "hard costs" of site and building construction;
- furniture, fixtures, and equipment (FF&E) and building technology;
- public art allowances;
- "soft costs" such as design and engineering fees, testing, permitting, and construction management; and
- contingencies to account for unforeseen circumstances as well as minor changes in size and scope as the projects are developed in more detail.

The capital maintenance plan incorporates escalation at approximately 3 to 4% per year over the life of the 10-year plan. However, because project timelines have not yet been developed for the recommended Gain plan (service model upgrades) and Attain plan (capacity expansion) projects, no escalation has yet been applied to these budgets.

MAINTAIN

MAINTAIN PLAN – ADDRESSING CAPITAL MAINTENANCE NEEDS

The Maintain plan recommends projects over the next 10 years for all of SCPL's current facilities except for Felton and Capitola.

- Due to the extent of deficiencies – both physical and operational – at the current Felton Library building, the master plan recommends that SCPL abandon the historic church building and move the Felton Library into another facility. As such, the CMP includes only critical projects that will be needed at the existing building over the next two to three years while the Felton Library prepares to move to new accommodations.

- Similarly, because the Capitola Library's modular building has always been considered temporary, the master plan recommends that SCPL should find a more appropriate long-term facility for the Capitola Library. The CMP therefore includes a budget for critical projects that will arise over the next few years as SCPL and the Capitola community plan a new permanent library building.

It should be noted that the approximate replacement dates for projects in the CMP are intended as a guide rather than as a mandate. On a year-to-year basis SCPL may elect to accelerate or defer some projects for reasons such as if building components are failing earlier than expected; if building components are judged to have additional life; if coordinating types of projects across facilities would save money; and/or to balance year-to-year expenditures or SCPL project management workload.

The construction budget for the projects in the 2014-2023 CMP totals approximately $16.2 million. Over the 10 year CMP window, this would be an average capital investment of approximately $1.6 million per year. for the system overall. CMP budgets include cost escalation to each project's anticipated implementation date at approximately 3 to 4% per year. Budgets for individual projects are included in the detailed CMP which is a separate appendix to this report.

Over the 10-year life of the CMP, it is recommended that SCPL periodically review the cost basis and cost inputs for the project budgets, and revise them as needed to reflect actual market conditions and escalation.

Anticipated 10 year System-wide Renewal Costs per year

FY 2014	FY 2015	FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022	FY 2023
$546,000	$3,233,000	$3,269,000	$2,165,000	$1,589,000	$938,000	$1,249,000	$1,367,000	$97,000	$1,699,000

Anticipated 10 year System-wide Renewal Costs per year

average maintenance need = $1.6 million per year
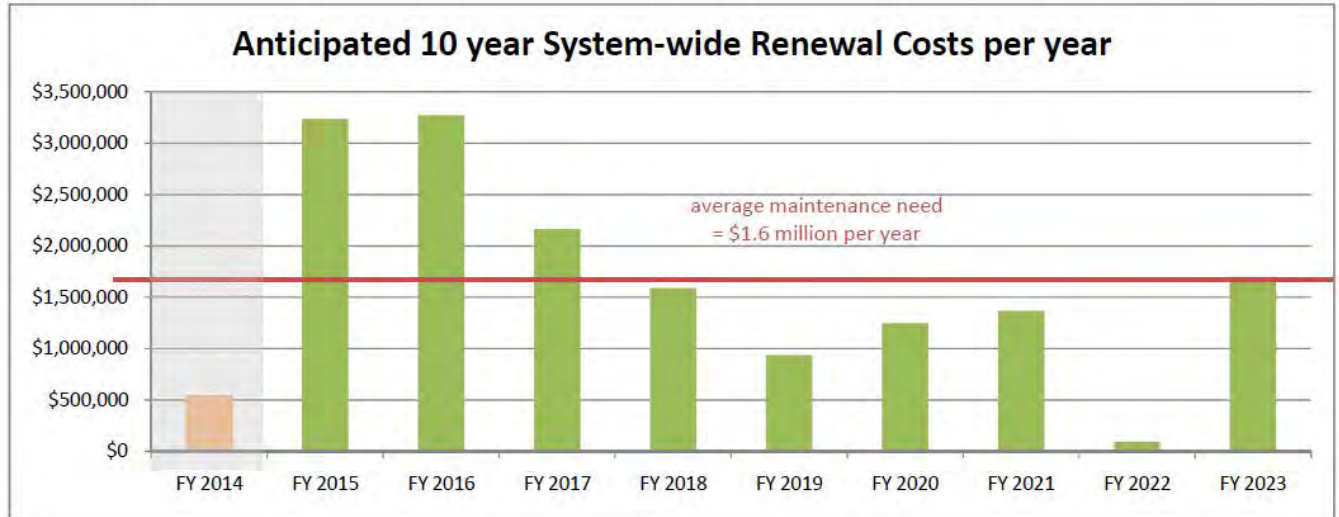
MAINTAIN

Library	Owner	Maintain Projects
Aptos	County	$ 1,755,000
Boulder Creek	County	$ 1,271,000
Branciforte	Santa Cruz	$ 1,128,000
Capitola	Capitola	$ 368,000
Downtown	Santa Cruz	$ 8,186,000
Felton	Belardi	$ 55,000
Garfield Park	Santa Cruz	$ 323,000
Headquarters	Santa Cruz	$ 724,000
La Selva Beach	LSBRD	$ 258,000
Live Oak	County	$ 1,131,000
Scotts Valley	Scotts Valley	$ 954,000
Total		**$ 16,153,000**

Boulder Creek Library

Branciforte Library

HOW THE CAPITAL MAINTENANCE PLAN WAS DEVELOPED

The Capital Maintenance Plan (CMP) is a scheduled compilation of building components, anticipated replacement years, and associated budget information. Organized according to standard UCI categories, the CMP calculates the anticipated replacement year for each component. It is a powerful tool for building owners and managers to develop an annual capital maintenance budget and plan specific projects each year.

For SCPL's CMP, the calculation to determine year of replacement was done in two ways:

- Where the age of a component was known, an industry standard life expectancy was used to calculate the year of anticipated replacement. For example, if a rooftop mechanical unit with a life expectancy of 20 years was installed in 2001, its anticipated year of replacement would be 2021.

- For components whose exact year of installation was not known, two criteria were used to develop an approximate replacement date. The first criterion was current condition, based on observation and rated on a scale from one (like new) to five (high risk of failure). The second criterion was the impact that the component's failure would have on library operations, also rated on a scale from one (little to no impact) to five (major interruption to operations). The ratings from these two criteria were added together, and the sum was subtracted from 2023 (the end of the 10-year capital maintenance planning timeline) to assign a year for capital replacement.

In the aggregate, the CMP information also offers a high-level view of the condition of SCPL's facilities overall. An indicator known as the Facility Condition Index (FCI) is calculated as the ratio of the value of the recommended CMP projects for each building to the estimated construction cost to replace the building entirely. A lower FCI suggests that a building is more up-to-date on capital maintenance, whereas a higher FCI suggests that there are significant deferred maintenance issues that need to be addressed. As the FCI increases beyond 40%, building owners should conduct a cost-benefit analysis of continuing to maintain the existing building. Some agencies and property managers even establish an upper FCI limit beyond which they automatically elect to replace the entire building.

Facility Summary and FCI

Facility	Gross SQ FT	Yr. Built	Anticipated Renewal Costs FY2014-2023	Facility Condition Index (FCI) 5 Year FCI	10 Year FCI
Aptos	8,000	1975	$1,755,000	38.4%	45.2%
Boulder Creek	4,600	1984	$1,271,000	45.8%	51.7%
Branciforte	7,500	1967	$1,127,000	28.2%	30.9%
Capitola	4,320	1999	$368,000		
Downtown	44,000	1968	$8,186,000	25.6%	38.4%
Felton	1,250	1892	$56,000		
Garfield Park	2,340	1915	$323,000	19.0%	25.9%
Headquarters	13,800	2008	$724,000	5.5%	11.4%
La Selva Beach	2,200	1975	$259,000	15.3%	22.0%
Live Oak	13,500	2006	$1,130,000	8.5%	17.3%
Scotts Valley	13,150	2011	$954,000	0.2%	15.0%

System Summary and System FCI

System Summary	GSF	Average Building Age (Yrs)	Anticipated Renewal Costs FY2014-2023	5 Year FCI	10 Year FCI
All Buildings	114,660	40	$16,153,000	19.6%	29.0%

- Facility Condition Index (FCI) is an indicator of overall building condition.

Building Condition	FCI
Good	0 to 10%
Fair	10.1 to 20%
Poor	20.1 and above

Formula: $\dfrac{\text{Renewal Costs (\$)}}{\text{Building Replacement Value (\$)}} = FCI$

Example: $\dfrac{\text{Renewal Costs of \$5M}}{\text{Replacement Value of \$10M}} = \dfrac{5,000,000}{10,000,000} = .5 \text{ or } 50\%$

GAIN PLAN – IMPROVING LIBRARY SERVICE AND OPERATIONS

Gain plan projects will modify SCPL's current facilities to better serve the public and adapt to changing needs, technologies, operations, and services over the next decade and beyond.

The Gain plan is recommended for the following facilities, which are adequately sized and do not need to expand. At these libraries, recommended projects include the creation of a browsable, retail-style "marketplace" with new and popular materials, consolidation of staff service points, and enhancement of express checkout units and other customer self-service amenities. SCPL is also encouraged to evaluate opportunities to improve the sustainability of these facilities, such as through participation in renewable energy programs.

• Boulder Creek

• Branciforte

• Garfield Park

• Live Oak

• La Selva Beach

For the following libraries, the Gain plan is one option. Alternative project options for these libraries are proposed in the Attain plan, which is described in the next section.

• Aptos – The meeting room at the Aptos Library is under-utilized, sitting dark and empty for much of the day. In addition to implementing other Gain-level recommendations such as a marketplace, there is an opportunity at the Aptos Library to open up the wall between the meeting room and the main adult reading room, creating flexible space that can be more easily used for reading and study when not in use for programs. Given its high circulation rate, the Aptos Library may also be a candidate for an automated materials handling system.

• Downtown – Over time, the Downtown Library's role in supporting the rest of the libraries in the SCPL system has changed. For example, although Reference Services staff remain in the Downtown Library, Technical Services staff have moved their operations across the street to SCPL Headquarters. In addition to implementing the other Gain-level recommendations (such as a marketplace and improved self-service), there is an opportunity at the Downtown Library to recapture some of its underutilized back-of-house space for public uses such as a technology learning lab and/or improved space for teens. As the highest circulating library in the SCPL system, the Downtown Library could also be a strong candidate for a robust automated materials handling system.

- Scotts Valley – The Scotts Valley Library is the first in the SCPL system to implement the major elements of the new service model – a retail-style marketplace, a consolidated service desk, prominent self-service features, and excellent customer access to power and data. The building is already designed to support the Gain-level implementation of an automated materials handling system. Another improvement that SCPL may wish to consider at the Gain level would be a sound-attenuation system, as the popularity of the new library has resulted in some complaints about noise at peak use times such as after school.

The master plan does not include Gain-level recommendations for Felton and Capitola, as both of these current facilities should be abandoned. The Gain plan also does not make recommendations for Headquarters.

The budget for the Gain plan is approximately $3 million to $5 million for projects at all of the libraries except Felton, Capitola, and Headquarters. The Gain plan budget is in addition to the budget for the projects in the Maintain plan at each facility. The budget includes construction costs, soft costs, and contingencies. However, because phasing has not yet been determined, escalation has not been included in the Gain plan project budgets.

MAINTAIN + GAIN					
Library	Owner	Low	to		High
Aptos	County	$ 2,205,000	to	$	2,455,000
Boulder Creek	County	$ 1,596,000	to	$	1,846,000
Branciforte	Santa Cruz	$ 1,453,000	to	$	1,703,000
Capitola *	Capitola	$ 368,000	to	$	368,000
Downtown	Santa Cruz	$ 9,586,000	to	$	10,086,000
Felton *	Belardi	$ 55,000	to	$	55,000
Garfield Park	Santa Cruz	$ 448,000	to	$	448,000
Headquarters **	Santa Cruz	$ 724,000	to	$	724,000
La Selva Beach	LSBRD	$ 508,000	to	$	508,000
Live Oak	County	$ 1,456,000	to	$	1,706,000
Scotts Valley	Scotts Valley	$ 1,004,000	to	$	1,254,000
Total		$ 19,403,000	to	$	21,153,000

* No Gain plan recommendations for Felton and Capitola; Attain plan only
** Maintain plan recommendations only for Headquarters

ATTAIN

ATTAIN PLAN – BUILDING CAPACITY FOR THE FUTURE

The Attain plan addresses space deficiencies relative to current needs and provides additional capacity to accommodate future population growth. Attain projects include the following:

- Capitola – The Capitola Library moved into its "temporary" facility in 1999 – the same modular building it still occupies today. Capitola is overdue for a larger and more permanent facility. The Attain plan recommends a new library for Capitola of approximately 12,000 to 15,000 square feet. The recommended project budget is approximately $10.2 to $12.9 million to develop a new library building of this size along with its associated parking on the current Capitola Library site. It should be noted that the dissolution of Capitola's Redevelopment Agency also removed the obligation to develop the library only on the current site; the Capitola community may wish to evaluate opportunities to develop a new library on an alternate site.

- Felton – The Felton Library's current building simply cannot be upgraded to meet the community's library needs. The Felton Library should move to another building. For a number of years, members of the Felton community have been planning for a new library; the latest iteration of the plan was a new 9,300 square foot standalone building on land that is in the process of being donated to the County. Should this option prove unfeasible, one possible alternative would be to acquire an existing building in Felton's commercial corridor and convert it for use as a new library. The recommended project budget for a 9,300 square foot new Felton Library is approximately $8.6 million.

- Aptos – The Aptos Library is the third highest-used SCPL branch. This master plan recommends expansion of the Aptos Library in order to better serve the community. One option would be to renovate and expand the existing building up to approximately 11,000 square feet, which is the most that the current building and site configuration can reasonably accommodate without sacrificing either operational efficiency or parking capacity. The Aptos Library could also be replaced on its current site with a new, more operationally- and energy-efficient building of up to 16,000 square feet. The recommended project budget is approximately $7.6 to $13.4 million.

- Downtown – Although expansion of the Downtown Library is not recommended, this master plan strongly recommends that the building should be extensively renovated or replaced. Major renovation would replace most of the 45-year-old building's aging systems, upgrade interior (and possibly exterior) finishes, and upgrade the building to meet current codes; the project could also include major reorganization of the interior to create new spaces, enhance operational efficiency, and improve customer wayfinding. In addition to improving library service, full building replacement would provide the opportunity to maximize energy efficiency, minimize the environmental footprint, and further enhance downtown urban development. A new Downtown Library could also offer the opportunity to build partnerships, such as through shared facilities with complementary uses. The recommended project budget is approximately $24.9 to $35.6 million.

- Scotts Valley – The Scotts Valley Library is the second-busiest branch in the SCPL system, circulating proportionally more materials than the amount of space it provides. Although its current size is adequate, population growth may exceed the library's capacity to meet community needs in the future. SCPL may want to consider future expansion into the adjacent tenant space in the Scotts Valley Library building. The recommended project budget for expansion is approximately $5.4 to $5.6 million.

For the renovation/expansion options at Aptos and Downtown, these budgets incorporate the projects (as applicable) contained in the capital maintenance plan, and therefore are not additive to the Maintain plan budgets for those facilities. The proposed expansion of the Scotts Valley Library is in addition to the projects in both the Maintain and Gain plans, and therefore is additive to those budgets.

MAINTAIN + GAIN + ATTAIN

Library	Owner	Low	to	High
Aptos	County	$ 7,630,000	to	$ 13,400,000
Boulder Creek	County	$ 1,596,000	to	$ 1,846,000
Branciforte	Santa Cruz	$ 1,453,000	to	$ 1,703,000
Capitola	Capitola	$ 10,160,000	to	$ 12,880,000
Downtown	Santa Cruz	$ 24,900,000	to	$ 35,550,000
Felton	Belardi	$ 8,620,000	to	$ 8,620,000
Garfield Park	Santa Cruz	$ 448,000	to	$ 448,000
Headquarters	Santa Cruz	$ 724,000	to	$ 724,000
La Selva Beach	LSBRD	$ 508,000	to	$ 508,000
Live Oak	County	$ 1,456,000	to	$ 1,706,000
Scotts Valley	Scotts Valley	$ 5,384,000	to	$ 5,634,000
Total		**$ 62,879,000**	**to**	**$ 83,019,000**

IMPLEMENTATION

"Libraries are experiencing an historic resurgence as community centers at exactly the same time that government support for them is waning. Circulation is at historic highs despite dwindling book budgets, and the number of programs on offer is greater and more diverse than ever before, even as staff levels have plateaued. This is a huge lost opportunity.... If libraries are going to fulfill their potential as engines of upward mobility and take advantage of opportunities afforded by the Internet, they will need far greater financial and institutional support than they have received so far."
— Center for an Urban Future, Branches of Opportunity (2013)

IMPLEMENTATION PLANNING

The scope of this master plan does not include the development of a specific implementation plan. It will be the task of the LJPB to determine strategies for phasing and funding the master plan-recommended projects. This section is intended as a guide for the LJPB as it moves forward with the next steps of planning implementation of the Gain and Attain-level recommendations.

SUMMARY OF PROJECT BUDGETS

The project budgets developed for this master plan attempted to be as comprehensive as possible in accounting for the hard costs, soft costs, contingencies, and other anticipated project components. However, there are likely to be additional costs that have not yet been included in the project budgets because they are not yet well defined. It will be important to better define these elements and add their associated costs into the program budget in order to ensure that they are incorporated in the funding strategy.

As their scope becomes better defined, the following will need to be added into the program budget:

- SCPL program management (currently estimated at approximately $100,000 per year per staff position)
- cost escalation to the anticipated date of construction bid
- hazardous materials abatement, as appropriate
- temporary library facilities during construction
- moving expenses

PROJECT BUDGET SUMMARY

Library	Owner	MAINTAIN	MAINTAIN + GAIN		
		Maintain Projects	Low	to	High
Aptos	County	$ 1,755,000	$ 2,205,000	to	$ 2,455,000
Boulder Creek	County	$ 1,271,000	$ 1,596,000	to	$ 1,846,000
Branciforte	Santa Cruz	$ 1,128,000	$ 1,453,000	to	$ 1,703,000
Capitola	Capitola	$ 368,000	$ 368,000	to	$ 368,000
Downtown	Santa Cruz	$ 8,186,000	$ 9,586,000	to	$ 10,086,000
Felton	Belardi	$ 55,000	$ 55,000	to	$ 55,000
Garfield Park	Santa Cruz	$ 323,000	$ 448,000	to	$ 448,000
Headquarters	Santa Cruz	$ 724,000	$ 724,000	to	$ 724,000
La Selva Beach	LSBRD	$ 258,000	$ 508,000	to	$ 508,000
Live Oak	County	$ 1,131,000	$ 1,456,000	to	$ 1,706,000
Scotts Valley	Scotts Valley	$ 954,000	$ 1,004,000	to	$ 1,254,000
Total		$ 16,153,000	$ 19,403,000	to	$ 21,153,000

Library	Owner	MAINTAIN + GAIN + ATTAIN		
		Low	to	High
Aptos	County	$ 7,630,000	to	$ 13,400,000
Boulder Creek	County	$ 1,596,000	to	$ 1,846,000
Branciforte	Santa Cruz	$ 1,453,000	to	$ 1,703,000
Capitola	Capitola	$ 10,160,000	to	$ 12,880,000
Downtown	Santa Cruz	$ 24,900,000	to	$ 35,550,000
Felton	Belardi	$ 8,620,000	to	$ 8,620,000
Garfield Park	Santa Cruz	$ 448,000	to	$ 448,000
Headquarters	Santa Cruz	$ 724,000	to	$ 724,000
La Selva Beach	LSBRD	$ 508,000	to	$ 508,000
Live Oak	County	$ 1,456,000	to	$ 1,706,000
Scotts Valley	Scotts Valley	$ 5,384,000	to	$ 5,634,000
Total		$ 62,879,000	to	$ 83,019,000

IMPLEMENTATION

PROJECT PHASING

There are many criteria for the LJPB to consider in developing a sequencing plan for the recommended projects. In no particular order, these include:

- Geographic equity – distributing facility improvements throughout the county so that communities in each region see improvements
- Continuity of service – ensuring that communities retain access to library services even during closure of facilities for construction
- Facility condition – early implementation of projects that address the most challenging facility conditions, such as Felton and Capitola
- Facility capacity – early implementation of projects that expand the amount of library space available to the community
- Project management – balancing project phasing within SCPL's project management capacity
- Funding flow – matching projects to available funding sources and strategies
- Opportunity – taking advantage of partnerships and opportunities as they arise

There may also be other political, fiscal, social, and/or community criteria that the LJPB could include in determining the sequencing of specific projects.

Phasing example 1 at right illustrates one concept for combining the criteria of facility condition; facility capacity; and geographic equity.

Illustrative phasing example 1

Phasing example 2 at right illustrates a concept based on prioritizing the Gain plan projects for early implementation of the service model.

Illustrative phasing example 2

FINDINGS AND RECOMMENDATIONS BY FACILITY

This section summarizes the specific master plan-recommended projects and project budgets for each of SCPL's facilities.

MAINTAIN PROJECTS

The Maintain plan focuses on the physical conditions of SCPL's existing facilities – addressing deferred maintenance needs and developing a proactive plan for capital maintenance projects over the next decade. The Capital Maintenance Plan (CMP) does not address routine maintenance, such as periodically changing light bulbs and air filters. Rather, the CMP focuses on replace building systems, materials, and furniture as they reach the end of their expected useful lives. When implementing CMP projects, SCPL will have the option to replace the current systems, finishes, and furnishings with alternatives that also achieve other goals, such as improved energy performance, reduced environmental footprint, a wider variety of reader seating, and updated aesthetics.

It should be noted that a full ADA accessibility survey was beyond the scope of this master plan study. Although some of the recommended projects are accessibility-oriented, the CMP should not be considered a complete list of all projects that may be needed to comply with current accessibility codes. A separate specific study of this issue is recommended.

SCPL may also wish to commission a specific roof condition survey, as in most cases the consultant team did not directly observe the roofs.

GAIN PROJECTS

The Gain plan recommends improvements to SCPL's current buildings to enhance library service and support SCPL's new service model. The Gain plan builds on the projects in the Maintain plan, adding elements such as increased customer access to power and data (as recommended in the technology plan); consolidated staff service points; enhanced customer self-service opportunities; and a more browsable collection. The Gain plan also proposes that SCPL consider adding automated materials handling (AMH) at libraries where circulation levels are high enough to have benefit. Gain plan projects do not include building expansion.

ATTAIN PROJECTS

The Attain plan addresses the most severe deficits in facility condition and builds capacity to better serve the community. The Attain projects will help SCPL meet the needs of the current population – which has grown and shifted dramatically in the years since these libraries were first constructed – and to accommodate the added population growth expected in Santa Cruz County in the future.

MAINTAIN

GAIN

ATTAIN

PROJECT BUDGETS

The project budgets developed for this master plan attempted to include all anticipated elements such as hard costs, soft costs, and contingencies. However, the master plan budgets do not include other costs that have not been well defined.

As SCPL moves forward with implementation, it will be important to evaluate to what extent the following elements and their associated costs should be added to the program budget, as appropriate:

- *SCPL program management*
- *construction cost escalation for Gain and Attain projects*
- *hazardous materials abatement*
- *temporary library facilities*

APTOS

7695 Soquel Drive
Aptos, CA 95003

Built in 1973
8,000 Square Feet
Owner: Santa Cruz County

MAINTAIN

Ventilation is a persistent problem at the Aptos Library. The original design did not permit sufficient venting at the roof, leading to mold in the ceiling (which has been addressed in recent repairs). The HVAC system provides heat but little cooling; the design intent was that louvers at the windows would provide sufficient cross-ventilation to cool the interior of the building most of the time. Staff have added multiple oscillating fans, but report that the library is still uncomfortably warm inside even when the weather is not hot.

Major Maintain projects due over the next decade include replacing the roof, refurbishing or replacing library furniture, new interior finishes, and new exterior paint.
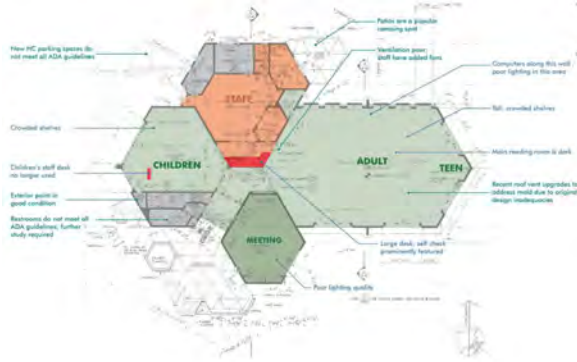
GAIN

The meeting room at the Aptos Library is designed so that it can be used independently from the rest of the library. However, outside of use for programs, it is under-utilized, sitting dark and empty for much of the day. There is an opportunity to open up the wall between the meeting room and the main adult reading room, creating flexible space that can be more easily used for reading and study when not in use for programs.

Other Gain plan recommendations include a redesigned service desk, more prominent self-checkout, and the creation of a marketplace with browsable, retail-style shelving for new materials and themed collections. There is a budget in the Gain plan for enhanced customer access to power and data.

Given its high circulation rate, the Aptos Library may be a candidate for an automated materials handling system.

There appears to be sufficient space on the site to provide an opportunity for photovoltaics and/or other technologies that could enhance the library's energy efficiency and reduce its environmental footprint.

MAINTAIN

Aptos

- Major projects by 2020 include:
    - New roof
    - Restroom rebuild
    - New interior finishes
    - Exterior paint

Recommended budget for 2014-2023 Maintain projects at Aptos Library is approximately **$1.8 million** including escalation

GAIN

Aptos

- Upgrade service desk, holds retrieval, and self-check
- Improve merchandising and display of popular materials
- Upgrade customer access to power and data
- New retractable wall at meeting room to improve flexibility
- Option: AMH

Recommended budget for Aptos Library Gain projects is **$450,000 to $700,000** not including Maintain Plan (see page 29 for budgeting methodology)

APTOS

The master plan recommends expansion of the Aptos Library – the third highest-used SCPL branch – of up to 16,000 square feet in order to better serve the community today and in the future. The current site can accommodate a more efficient and sustainable replacement building of approximately 16,000 square feet.

As an alternate, the current building could be expanded up to approximately 11,000 square feet without sacrificing operational efficiency or parking.

One option is renovation and expansion of the existing building up to approximately 11,000 square feet, which is the most that the current building and site configuration can reasonably accommodate in a single story without sacrificing either operational efficiency or parking capacity. This would include major renovation of the existing structure to bring it into compliance with modern structural, energy, accessibility, and other applicable codes.

ATTAIN APTOS – RENOVATE/EXPAND EXISTING

FLOOR PLAN DIAGRAM

SITE OVERVIEW

SIDE ADDITIONS
- Total ~11,000 SF
- Retain existing parking
- Retain existing roof structure

Opportunities
- Strengthen civic connections
- Improved public space
- Better circulation
- Configured to enable multi-mode operations

ATTAIN   APTOS – REPLACE

UPPER LEVEL

LOWER LEVEL

Building Capacity
- ~12,000 to 16,000 SF
- Retain existing parking

Opportunities
- Echoes grand reading room of previous building
- Multimode functionality
- Good daylighting
- Better circulation
- Room shapes offer more efficient use of space

The Aptos Library could be replaced on its current site with a new building of up to approximately 16,000 square feet on two levels. In a two-story option, program elements should be organized carefully to minimize the need for a constant staff presence on the second floor.

ATTAIN

Recommended budget for expansion or replacement of the Aptos Library is
$7.6 to $13.4 million
(see page 29 for budgeting methodology)

BOULDER CREEK

13390 West Park Avenue
Boulder Creek, CA 95006

Built in 1984
4,600 Square Feet
Owner: Santa Cruz County
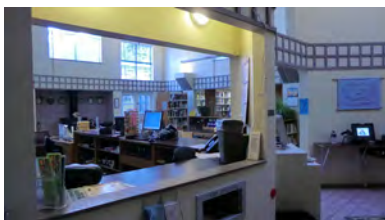
MAINTAIN

Although it is one of the newer libraries in the SCPL system, the Boulder Creek Library is nearly 30 years old, and has not had any major renovation since it was built. Recommended Maintain plan projects within the next decade include a new roof, new interior finishes, and upgraded restrooms that comply with accessibility codes. Currently there are two separate electrical panels in the building; this is not compliant with current code and poses a significant hazard to maintenance personnel working on the building. There is evidence of site erosion that will likely need to be addressed. There is some rotting of original wood doors.

When replacing finishes in the circulation area, there is an opportunity to use materials that will reduce the noise and echoing that currently occur in that space. The light fixtures in this space are high and difficult to re-lamp; replacement lighting should support better lighting levels as well as easier re-lamping.

GAIN

The large staff desk at the Boulder Creek Library is a candidate for replacement with a smaller service point and an expanded focus on customer self-service. There is also a budget in the Gain plan for enhanced customer access to power and data per the recommendations of the technology plan.

There may be sufficient space on the site to provide an opportunity for photovoltaics and/or other technologies that could enhance the library's energy efficiency and reduce its environmental footprint.

The configuration of the building could support the addition of an automated materials handling system relatively easily, should SCPL feel that it would be warranted by circulation levels.

ATTAIN

The Boulder Creek Library is adequately sized and is not recommended for replacement. No expansion is proposed.

MAINTAIN

Boulder Creek

- Major projects by 2020 include:

  - HVAC upgrade
  - New roof
  - New interior finishes
  - Restroom upgrades
  - (Septic system repairs in progress)

MAINTAIN

Recommended budget for 2014-2023 Maintain projects at Boulder Creek Library is approximately **$1,271,000** including escalation

GAIN

Boulder Creek

- Upgrade service desk, holds retrieval, and self-check

- Upgrade customer power and data access

- Better merchandising and display of collection materials

- Reconfigure staff area to recapture space for public use

- Option: AMH

GAIN

Recommended budget for Boulder Creek Library Gain projects is **$325,000 to $575,000** not including Maintain Plan (see page 29 for budgeting methodology)

BRANCIFORTE

230 Gault Street
Santa Cruz, CA 95062

Built in 1967
7,500 Square Feet
Owner: City of Santa Cruz

MAINTAIN

The Branciforte Library is an attractive building filled with light. Interior and exterior finishes are showing clear signs of wear and are due for replacement soon. Some roof repairs have been completed recently on an emergency basis following a fire; however, a full roof replacement will likely be due over the next decade. Other major Maintain plan projects include upgrades to the electrical and HVAC systems and refurbished or replacement library furniture.

GAIN

The original large staff desk at the Branciforte Library was replaced relatively recently with a smaller "Ask Here" desk and a more prominent self-checkout unit. However, the new configuration is such that customers have a hard time seeing the "Ask Here" desk from the building entry; staff at the returns sorting station report that customers frequently interrupt them to ask for assistance.

Gain plan opportunities to improve the service model at the Branciforte Library include a more visible and functional service desk, improved self-checkout, and the creation of a marketplace with browsable, retail-style shelving for new materials and themed collections. There is also a budget in the Gain plan for enhanced customer access to power and data.

The Branciforte Library has a designated space for teens with seating, computers, and collection materials. Customers must walk through the teen area to access the group study/meeting room, which may be underutilized for this reason. As part of the Gain plan there may be an opportunity to recapture some of the staff space for use as a meeting/group study room, which would permit the existing group study room to be more permanently incorporated into the teen space.

There is little space on the site to add photovoltaics and/or other technologies that could enhance the library's energy efficiency and reduce its environmental footprint. When the roof is due for replacement as part of the Maintain plan, SCPL may wish to evaluate opportunities to add such technologies on the roof.

ATTAIN

The Branciforte Library is adequately sized and is not recommended for replacement. No expansion is proposed.

MAINTAIN

GAIN

Recommended budget for 2014-2023 Maintain projects at Branciforte Library is approximately **$1,128,000** including escalation
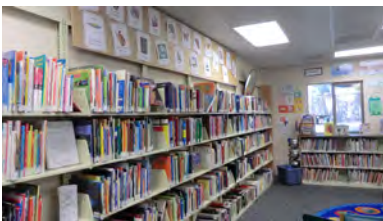
Recommended budget for Branciforte Library Gain projects is **$325,000 to $575,000** not including Maintain Plan (see page 29 for budgeting methodology)

CAPITOLA

2005 Wharf Road
Capitola, CA 95010

Built in 1999
4,320 Square Feet
Owner: City of Capitola

MAINTAIN

The Capitola Library moved into its "temporary" facility in 1999 – the same modular building it still occupies today. Because the modular building has served beyond its reasonably anticipated life span, SCPL should find a more appropriate long-term facility for this branch. The Maintain plan includes only a limited budget for projects that will arise over the next few years as SCPL and the Capitola community plan a new permanent library building.

GAIN

The master plan does not include Gain plan recommendations for the Capitola Library. It is hard to justify the expense of ugprading the modular structure, which should be abandoned.

ATTAIN

The Attain plan recommends a new library for Capitola of approximately 12,000 to 15,000 square feet. The current Capitola Library site could accommodate a new library building of this size along with its associated parking.

The dissolution of Capitola's Redevelopment Agency removed the obligation to develop the library only on the current site. The Capitola community may wish to evaluate opportunities to develop a new library on an alternate site and/or with complementary partners in a shared facility.

MAINTAIN

Capitola

ADA parking spaces relatively remote from building

STAFF

Returns deposited into staff work area

DROP

STORY MULTI ROOM

ADULT

Differential settlement between modular units causing ceiling tile failures

Finishes generally in good condition

Most adult seating provided at a single long table

WOMEN

Open space provided for children's programs

CHILDREN

MEN

CUSTODIAN

Densely-spaced, tall, and full shelves

- Modular building – reaching the end of its expected life

- To maintain, major projects by 2020 include:

  - Foundation repairs

  - New interior and exterior finishes

  - Replace HVAC package units

MAINTAIN

Recommended budget for Maintain projects at Capitola Library is approximately **$368,000** including escalation. This represents only critical projects over the next few years until a new permanent Capitola Library facility is acquired.

ATTAIN
CAPITOLA – REPLACE ON CURRENT SITE

Whalr Road

49 spaces

1. Single Story: 12,000 –15,000 SF
- Smaller = All uses on one-story
- Larger = Multipurpose room, tech classroom are on second level
- Sufficient parking for both options

Opportunities
- Preserves and integrates the playground
- Multimode functionality
- Compatible design with surroundings
- Better circulation
- Outdoor terrace for community room

Terrace
Multipurpose Room
Adult Collection
Children's Collection
Open to Below
Marketplace
Custodian

Second Floor Plan

49 spaces

Staff Area
Adult Collection
Children's Collection
Circ
Company
Marketplace

First Floor Plan

49 spaces

ATTAIN

Recommended budget for replacement of the Capitola Library is **$10.2 to $12.9 million** (see page 29 for budgeting methodology)

DOWNTOWN

224 Church Street
Santa Cruz, CA 95060

Built in 1968
44,000 Square Feet
Owner: City of Santa Cruz

MAINTAIN

Recommended budget
for 2014-2023 Maintain
projects at Downtown
Library is approximately
$8.2 million
including escalation

In addition to serving the local Santa Cruz community, the Downtown Library is a critical resource for the entire SCPL system, housing a number of special collections (music, local history, genealogy, etc.) as well as services such as the Information Technology department and centralized materials routing. The Downtown Library is also the center of operations for the Friends of the Santa Cruz Public Libraries.

MAINTAIN

The building is due for a number of significant deferred maintenance projects. There is evidence that the sanitary piping system on the second level is failing and needs replacement. The restrooms do not comply with current accessibility codes. The building exterior was repainted in 2012, but interior finishes and furniture are heavily worn and due for replacement. The elevator and the roof will both be due for replacement during the 10-year Maintain plan.
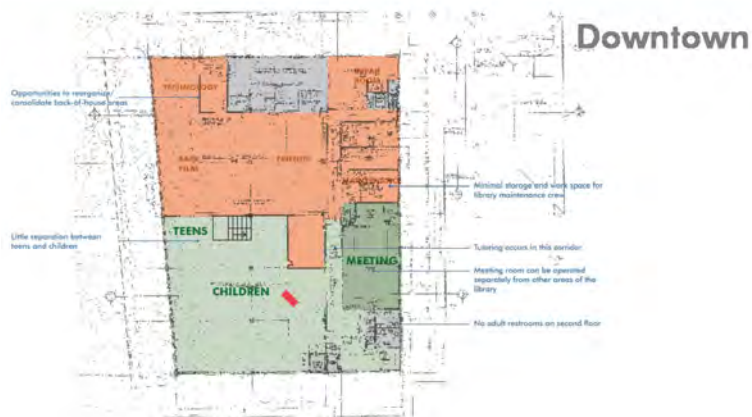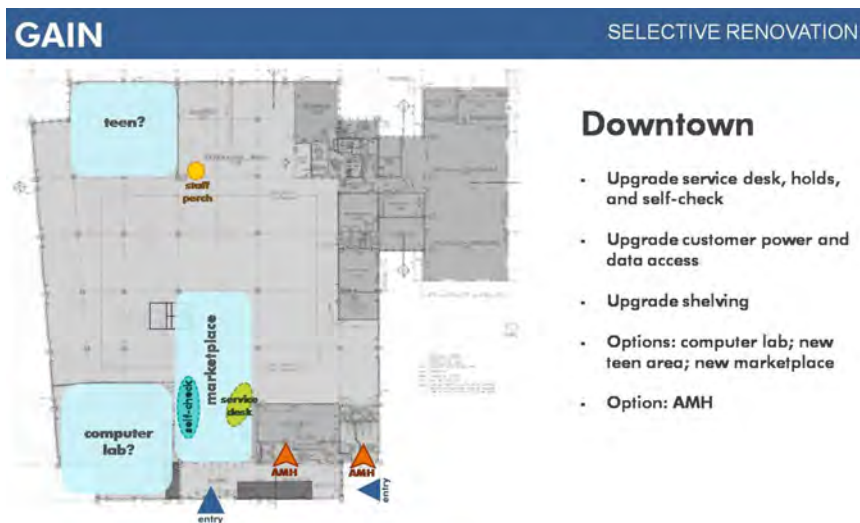
GAIN

Over time, the Downtown Library's role in supporting the rest of the libraries in the SCPL system has changed. For example, although Reference Services staff remain in the Downtown Library, Technical Services staff have moved across the street to SCPL Headquarters. In addition to implementing standard Gain plan recommendations such as a marketplace, improved self-service, and enhanced customer access to power and data, there is an opportunity at the Downtown Library to recapture some of its underutilized back-of-house space for new public uses such as a technology learning lab and/or improved space for teens. As the highest circulating library in the SCPL system, the Downtown Library could also be a strong candidate for a robust automated materials handling system.

There is little space on the site for ground-mounted photovoltaics or other energy generating/saving technologies. When the roof is due for replacement as part of the Maintain plan, SCPL may wish to evaluate the opportunity to add such technologies on the roof.

GAIN — SELECTIVE RENOVATION

Downtown

- Upgrade service desk, holds, and self-check

- Upgrade customer power and data access

- Upgrade shelving

- Options: computer lab; new teen area; new marketplace

- Option: AMH

GAIN

Recommended budget for
Downtown Library
Gain projects is
$1.4 to $1.9 million
not including Maintain Plan
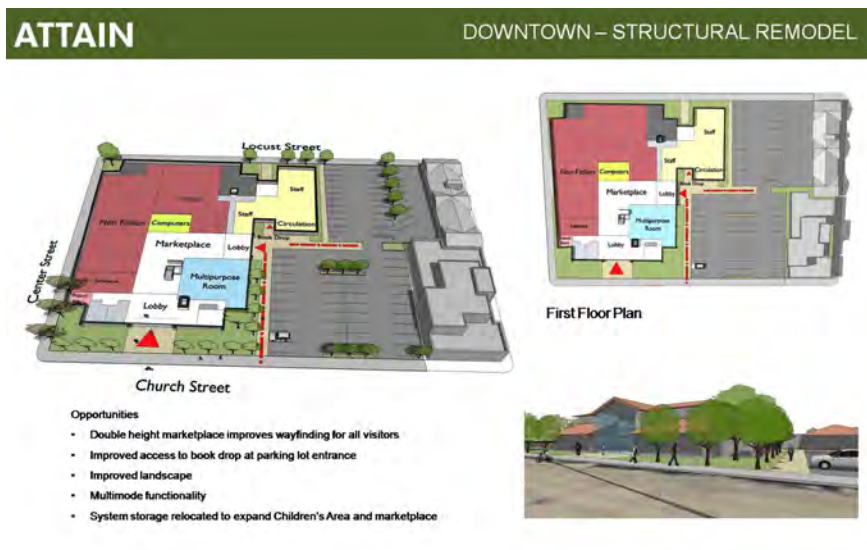(see page 29 for
budgeting methodology)

DOWNTOWN

ATTAIN

Although the master plan does not find that the Downtown Library needs to be expanded, due to the age and condition of the building the Attain plan strongly recommends extensive renovation or full replacement.

Major renovation would replace most of the 45-year-old building's aging systems, upgrade interior (and possibly exterior) finishes, and upgrade the building to meet current codes; the project could also include major reorganization of the interior to create new spaces, enhance operational efficiency, and improve customer wayfinding.

In addition to improving library service, full building replacement would provide the opportunity to maximize energy efficiency, minimize the environmental footprint, and enhance downtown urban development. A new Downtown Library could also offer the opportunity to build partnerships, such as through shared facilities with complementary uses.

A "structural remodel" of the Downtown Library would be one strategy for renewing the building for another 40 to 50 years of service. Such a project would maintain the basic structure and shell of the building, but replace most or all of the building systems with "greener" and higher efficiency alternatives. The library interior could be reorganized for improved layout and to create new spaces such as a distinct teen area and/or a cafe.

ATTAIN — DOWNTOWN – STRUCTURAL REMODEL

First Floor Plan

Opportunities
- Double height marketplace improves wayfinding for all visitors
- Improved access to book drop at parking lot entrance
- Improved landscape
- Multimode functionality
- System storage relocated to expand Children's Area and marketplace

**ATTAIN** — DOWNTOWN – STRUCTURAL REMODEL

Second Floor Plan

ATTAIN

Recommended budget for structural remodel or replacement of the Downtown Library is **$24.9 to $35.6 million** (see page 29 for budgeting methodology)

Replacement of the building on its current site could provide a range of opportunities, such as an improved connection with Pacific Street and a more environmentally-friendly building. There may also be opportunities to support revenue generation through the inclusion of rentable retail space, and/or the development of a joint-use facility with other public or private partners.

FELTON

6299 Gushee
Felton, CA 95018

Built in 1893
1,250 Square Feet
Owner: Belardi Trust
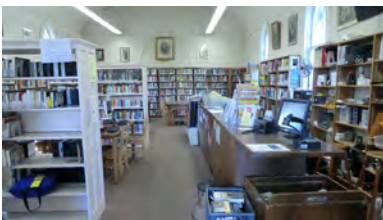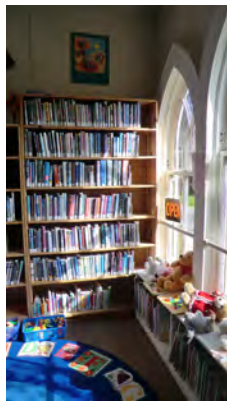
MAINTAIN

Due to the extent of deficiencies – both physical and operational – at the current Felton Library building, the master plan recommends that SCPL abandon the historic church building and move the Felton Library into another facility. As such, the CMP includes only projects that will be needed at the existing building over the next two to three years while the Felton Library prepares to move to new accommodations.

GAIN

The master plan does not include Gain plan recommendations for the Felton Library. Its current building simply cannot be upgraded to meet the community's library needs.

ATTAIN

The Felton Library should move to another building. For a number of years, members of the Felton community have been planning for a new library; the latest iteration of the plan was a new standalone building of approximately 9,300 square feet on a site being donated to the County.

An alternative to new construction would be to acquire an existing building in Felton's commercial corridor and adapt it for use as a new library. As the recent conversion of an existing building into the new Scotts Valley Library shows, adaptive reuse can be a cost-effective way to develop an attractive modern library that meets community needs.

MAINTAIN

Felton

- Leased facility is more than 120 years old
- Nearly all systems and materials are overdue for replacement
- Owner responsible for some repairs

MAINTAIN

Recommended budget for Maintain projects at Felton Library is approximately **$55,000** including escalation. This represents only critical projects within SCPL's responsibility over the next few years until a new permanent Felton Library facility is acquired.

ATTAIN

FELTON – PROPOSED NEW BUILDING

Felton

Previously proposed new ~9,300 SF library

Opportunities
- Convenient location
- Level site
- Full service library
- Good indoor-outdoor connections
- Natural light

ATTAIN

Recommended budget for replacement of the Felton Library is up to about **$8.6 million** (see page 29 for budgeting methodology)

A new library is needed in Felton at a size that can be operated efficiently. Members of the Felton community have been working for more than a decade to plan a new permanent library for the community. The latest version of the plan was a new building of approximately 9,300 square feet. Adaptive reuse of an existing building in the Felton commercial corridor (to be determined) may be an alternative.

GARFIELD PARK

705 Woodrow Avenue
Santa Cruz, CA 95060

Built in 1915
Renovated in 2002
2,343 Square Feet
Owner: City of Santa Cruz

MAINTAIN

The Garfield Park Library was the subject of a major renovation and expansion in 2002, so many of its building components are relatively new compared to other SCPL facilities. However, over the 10 year life of the master plan, Garfield Park will again be a candidate for updated interior and exterior finishes as well as some HVAC equipment replacements.

The historic designation of the Garfield Park Library complicates maintenance projects and can add expense. For example, there are a number of leaking windows; replacement windows will need to be custom made – at significant expense – in order to match the appearance and construction of the original frames as closely as possible.
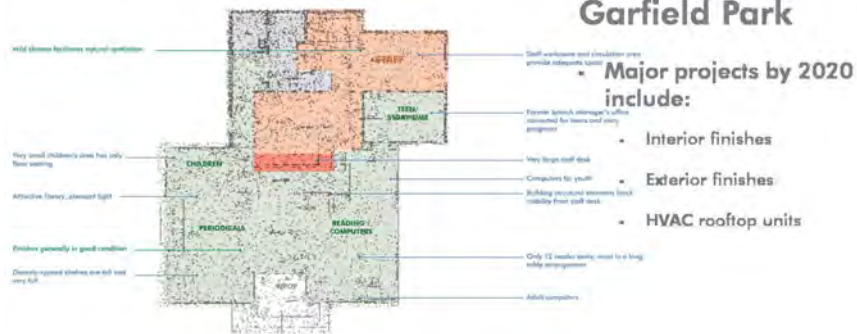
GAIN

The Gain plan includes a budget for a less prominent service desk, improved self-service, and enhanced technology and data access at the Garfield Park Library. It is a relatively low-circulating library and is not a strong candidate for automated materials handling.

ATTAIN

The Garfield Park Library is adequately sized and is not recommended for replacement. No expansion is proposed.

MAINTAIN

Garfield Park

- Major projects by 2020 include:
  - Interior finishes
  - Exterior finishes
  - HVAC rooftop units

MAINTAIN

Recommended budget for 2014-2023 Maintain projects at Garfield Park Library is approximately **$323,000** including escalation

GAIN

Garfield Park

- Upgrade service desk, holds retrieval, and self-check
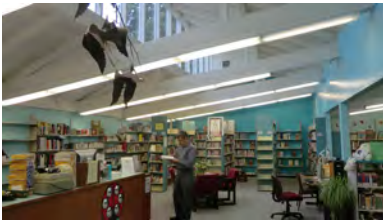
- Upgrade customer power and data access

GAIN

Recommended budget for Garfield Park Library Gain projects is approximately **$125,000** not including Maintain Plan (see page 29 for budgeting methodology)

LA SELVA BEACH

316 Estrella Avenue
La Selva Beach, CA 95076

Built in 1975
2,200 Square Feet
Owner: La Selva Beach
Recreation District

MAINTAIN

One of the La Selva Beach Library's bigger deficiencies is in controlling interior temperatures. There is no cooling system, and the space becomes uncomfortably warm in the summer. During colder weather, heating of the space is accomplished through large, noisy heating units suspended from the ceiling. The HVAC system is due for renovation/upgrade during the 10 year window of the Maintain plan.

Interior finishes and furniture at the La Selva Beach Library are due for replacement relatively soon.

GAIN

The Gain plan proposes replacement of the service desk, making self-checkout more prominent and user-friendly, and creating a browsable marketplace for new materials and themed collections. Upgrades to the electrical system would increase the availability of power for customer devices. The Friends of the La Selva Beach Library recently had proposed a project to accomplish several of the goals of the Gain plan, including replacement of the service desk and selected furniture, as well as swapping the adult and children's areas; for budget reasons this project was put on hold following the design phase.

ATTAIN

The La Selva Beach Library is adequately sized and is not recommended for replacement. No expansion is proposed.

MAINTAIN

La Selva Beach

- Leased facility; owner (LSB Recreation District) responsible for some repairs

- Major projects by 2020 include:
    - New interior finishes
    - New heating units
    - New roof

GAIN

La Selva Beach

- Upgrade service desk, holds, and self-check

- Upgrade customer power and data access

- Option: swap adult and children's areas

- Option: create more well-defined teen zone

MAINTAIN

Recommended budget for 2014-2023 Maintain projects at La Selva Beach Library within SCPL's responsibility is approximately **$258,000** including escalation

GAIN

Recommended budget for La Selva Beach Library Gain projects is approximately **$250,000** not including Maintain Plan (see page 29 for budgeting methodology)

LIVE OAK

2380 Portola Drive
Santa Cruz, CA 95062

Built in 2006
13,500 Square Feet
Owner: Santa Cruz County
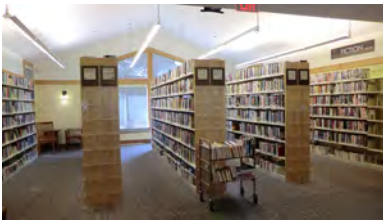
MAINTAIN

The Live Oak Library is the second-newest branch in the SCPL system. At less than 10 years old, it is still in very good condition, although some components such as the HVAC and electrical systems have required higher-than-anticipated levels of maintenance to date. A number of the building's components will reach the end of their anticipated 15-20 year life spans during the latter part of the 10-year Maintain plan window, from heating and cooling system components to some interior and exterior finishes.

GAIN

The Gain plan includes a budget for removing the reference and children's service desks, which are no longer staffed. There is an excellent opportunity to convert these areas into adult and children's marketplaces with highly browsable displays of popular materials and themed collections. The current large main circulation desk could be replaced with a less prominent staff post and more prominent self-service features such as material holds and express checkout units. The Gain plan also includes a budget to improve customer access to power and data, if needed.

There may be opportunities to create flexible space for programs in either the current non-fiction wing or the fiction pavilion.

As one of the top circulating libraries in the SCPL system, Live Oak may be a candidate for an automated materials handling system.

SCPL may wish to evaluate opportunities to implement photovoltaics and/or other energy generating/saving technologies on the site (such as on parking canopies) or on the roof.

ATTAIN

The Live Oak Library is adequately sized and is not recommended for replacement. No expansion is proposed.

MAINTAIN

MAINTAIN

Recommended budget
for 2014-2023 Maintain
projects at Live Oak Library
is approximately
$1.1 million
including escalation

GAIN

GAIN

Recommended budget for
Live Oak Library
Gain projects is
$325,000 to $575,000
not including Maintain Plan
(see page 29 for
budgeting methodology)

SCOTTS VALLEY

251 Kings Village Road
Scotts Valley, CA 95066

Built in 2011
13,150 Square Feet
Owner: City of Scotts Valley

MAINTAIN

The Scotts Valley Library is the newest facility in the SCPL system. Compared to SCPL's other facilities, there are relatively few projects in the Maintain plan at Scotts Valley, other than potentially addressing wear and tear on interior finishes and furniture over time. The building's roof was not upgraded as part of the adaptive reuse project, and will need to be replaced as part of the Maintain plan.

GAIN

The new Scotts Valley Library incorporates the service model elements that are recommended for the rest of SCPL's libraries in the Gain plan. Therefore, a smaller scope of projects is proposed at the Gain level for the Scotts Valley Library: the installation of a sound attenuation system, and the option of adding an automated materials handling system (and in fact the building was designed to be AMH-ready).

When the roof is due for replacement as part of the Maintain plan, SCPL may wish to investigate adding roof-mounted photovoltaics.

ATTAIN

The Scotts Valley Library is the second-busiest branch in the SCPL system, circulating proportionally more materials than the amount of space it provides. Although its current size appears to be adequate in the near term, future population growth may exceed the library's capacity to meet community needs in the long term. SCPL may want to consider future expansion into the adjacent, approximately 9,000 square foot tenant space. Options for this space include:

- Utilize the expansion space as a flexible space for meeting, conference, training, and performance uses with support spaces.

- Plan the expansion space to be flexible to allow independent use for library and other community uses.

- In place of the current program room that may move to expansion space, create maker spaces or customer media content creation studios.

Relocating the current meeting space and some or all of the group study spaces into the expansion space provides the opportunity for creative collaboration and content creation spaces that are emerging as a key component of the 21st century library. Maker spaces and media studios provide library customers with space, technology, and training to publish creative works, videos, and presentations. These are resources that are likely to be provided at many of the larger SCPL facilities in the future.

MAINTAIN

Scotts Valley

Major projects include:
- Finishes – 2021+
- Replace HVAC units
- Replace roof

MAINTAIN

Recommended budget for 2014-2023 Maintain projects at Scotts Valley Library is approximately **$954,000** including escalation

GAIN

Scotts Valley
- Electronic sound attenuation system
- Option: AMH

GAIN

Recommended budget for Scotts Valley Library Library Gain projects is **$50,000 to $300,000** not including Maintain Plan (see page 29 for budgeting methodology)

ATTAIN

SCOTTS VALLEY – EXPANSION

Scotts Valley

Expand into tenant space in existing building

Opportunities
- Meeting/performance space can support large programs or theatrical performances
- Along with the smaller support spaces, training and multi-event conferences can be hosted
- Meeting rooms in the library portion can become "maker spaces" to support the production of new content using digital media, fabrication and publishing

ATTAIN

Recommended budget for expansion of the Scotts Valley Library is approximately **$4.4 million** in addition to Maintain Plan and Gain Plan projects (see page 29 for budgeting methodology)

HEADQUARTERS

117 Union Street
Santa Cruz, CA 95060

Built in 2008
13,800 Square Feet
Owner: City of Santa Cruz

MAINTAIN

Recommended budget
for 2014-2023 Maintain
projects at Headquarters is
approximately **$724,000**
including escalation

MAINTAIN

Library Headquarters occupies leased space in a building across the street from the Downtown Library that is shared with another public agency. The building is approximately five years old and is in good condition. There are relatively few projects anticipated in the Maintain plan at Headquarters other than addressing wear and tear on interior finishes and furniture over time.

GAIN

There are no service model improvements proposed in this master plan for Headquarters. There may be opportunities for future renovation to improve functionality and to achieve greater efficiency in back-of-the-house operations. Detailed analysis was beyond the scope of this master plan.

The Headquarters building is certified LEED Gold and already has photovoltaic panels on the roof. As photovoltaic technologies evolve over time to increase energy generation, SCPL may wish to evaluate opportunities to expand or replace this system in the future.

ATTAIN

No Attain plan projects are recommended for Headquarters, as the current facility appears to have sufficient space. Administrative staff report that the close proximity of Headquarters to the systemwide services still located at the Downtown Library (for example, Information Technology) is important.

ACKNOWLEDGMENTS

The Santa Cruz Public Libraries Facilities Master Plan is built on the participation and generous contributions of many library, city, county, and community stakeholders.

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** Term began in 2013

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Ken Madonia

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ACKNOWLEDGMENTS

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G R O U P   4

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w w w . g 4 a r c h . c o m

29 March 2013

Library Joint Powers Board
SANTA CRUZ PUBLIC LIBRAIES
117 Union Street, Santa Cruz, CA, 95060

PROJECT
FACILITIES MASTER PLAN

SENT VIA
E-Mail:

TOPIC
Planning & Cost Methodologies

Dear Chair Terrazas and Members of the Library Joint Powers Board:

On March 18, 2013 members of the Group 4 planning team made a summary presentation to the LJPB of the master plan process and preliminary findings. We have incorporated comments received and refined our methodologies and updated the recommendations. This work has been incorporated into the Facilities Master Plan 2014-2023 Final Report dated 3/28/2013.

The Final Report's written narrative, though concise, answers many questions about the planning process and how the recommendations were developed. We have prepared this memo to share additional technical detail with you on the methodology.

We have appreciated the time and input given from staff of JPB communities and are happy to meet again to discuss the material further.

David Schnee, AIA, AICP, LEED
Principal

DS/HS

cc: Teresa Landers, Martin Bernal, Susan Mauriello, Jamie Goldstein, Steve Ando

W A Y N E   G E H R K E
A R C H I T E C T

D A W N   E .   M E R K E S
A R C H I T E C T

D A V I D   S C H N E E
A R C H I T E C T

D A V I D   M .   S T U R G E S
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J I L L   E Y R E S
A R C H I T E C T

J O N A T H A N   H A R T M A N
A R C H I T E C T

P A U L   J A M T G A A R D
A R C H I T E C T

W I L L I A M   L I M
A R C H I T E C T

A N D R E A   W I L L
A R C H I T E C T

Santa Cruz Public Libraries
Facilities Master Plan 2014-2023 Final Report dated 3/28/2013

Planning & Cost Methodologies Memorandum, 3/28/2013

Group 4 Architecture Research + Planning, Inc.
Jonathan Hartman, Senior Associate, Architect, LEED

1. MAINTAIN METHODOLOGY:

CMP, CMMS Methodology. The Maintain plan was derived using Capital Maintenance Plan (CMP) methodology that is compatible with standard Computerized Maintenance Management Systems (CMMS). The CMP is a scheduled compilation of building components, anticipated replacement years, and associated budget information. Organized according to standard UCI categories, the CMP calculates the anticipated replacement year for each component. It is a powerful tool for building owners and managers to develop an annual capital maintenance budget and plan specific projects each year.

Service Life. Service life of building uses BOMA and ASHRAE standards for specific components. For example a built-up roof has a service life of 20 years, and a clay tile roof has a service life of 50 years. The CMP methodology used budgets for *component replacement at the end of its service life*.

Assessment Survey. The SCPL maintenance survey was conducted by visual observation and historic document/record review.   Where installation dates were not known, visual assessment criteria were used to project a renewal timeline. In some instances, such as the evaluation done on the septic system at the Boulder Creek Library, work done concurrently with this study was included in the study to provide a more full and accurate picture of the system's total deferred maintenance needs.

Maintenance Timing. It should be noted that the approximate replacement dates for components in the CMP are intended as a guide rather than as a mandate. On a year-to-year basis SCPL may elect to accelerate or defer some projects for reasons such as if building components are failing earlier than expected; if building components are judged to have additional life; if coordinating types of projects across facilities would save money; and/or to balance year-to-year expenditures or SCPL project management workload.

Component Costs. The replacement costs of for each item in the Maintain plan were derived from a variety of sources, primarily RSMeans Building and Construction Cost Data, as well as Saylor Publications cost guides for 2013. The unit costs, general contractor's overhead and profit, and contingency factor were reviewed for appropriateness in methodology and unit cost accuracy by Bogard Construction, a local building contractor with significant library experience, and David Tanza, the construction manager for the recent Scotts Valley Library renovation project. The work was assumed to be performed by union installers/prevailing wage rates, and costs for contractor's overhead and profit were added to the base install cost. Because the individual item costs are tied directly to very specific items (e.g. the cost of a new HVAC rooftop air handler), a contingency cost of 30% on top of the base install cost was included for each line item to capture linked costs (in the example of the rooftop air handler, this contingency figure would include the removal of the original unit, the reworking of the elevated curb

that the unit sits upon in order to address changes in the size of the unit from old to new, and localized patching of the roofing material around the unit where these changes have taken place). These costs (the base install cost, the contractor's overhead and profit, and the contingency) are represented in today's (2013) dollars. The costs are then escalated to the anticipated renewal year.

FFE Methodology. Furnishings replacement costs are estimated on based on the total gross square footage of a facility. Group 4 used its own historic budgeting data from past, recent, and current library projects to estimate furnishings costs in four categories: Library Furniture, Office Furniture, Custom Casework, and Metal Shelving. Each category of furniture has a different approach to lifecycle costing.

Library Furniture. Library Furniture consists of reader chairs, lounge furniture, and furniture used by the public. Library furniture sees the greatest amount of wear because of its intense-use. Current best practices in library interiors are to include a mix of comfortable seating with partial to full upholstery. Institutional, commercial grade upholstery materials typically come with five year warranties. These fabrics can be repaired and furniture re-upholstered to extend its service life. This type of maintenance is typically seen within 10 years of install. This has proven to be true on the Santa Clara Central Park Library, a project with very durable finishes that has needed ongoing repair and re-upholstery of many pieces of furniture after about 8 years of service. By 15 years, a more significant repair, rebuild, or replacement will likely be required to address cushion material, failed springs, etc. *The CMP recommendation is to replace Library Furniture after 20 years.* Most SCPL library facilities have furnishings that are beyond this timescale, and so total replacement has been proposed. For the Live Oak and Scotts Valley branches, these buildings have newer furnishings and so it has been proposed that 20% of the total replacement value be used as a maintenance allowance for existing furniture in these two spaces. This allowance has been scheduled at a date that is 10 years from library opening.

Office Furniture. Office Furniture consists of systems furniture, workstations, and accessories. Office Furniture is heavily used by staff in back-of-house areas for their own personal workstations (cubicles). Workstation furniture is modular and can be partially updated and even reconfigured to extend its service life. Most major workstation furniture manufacturers continue to make complementary replacement parts and accessories for many years. After every 10 years of service reconfigurations and replacement to select components is typically required. *The CMP recommends budgeting office furniture at 30% of system replacement every 10 years or full replacement after 30 years.* After 30 years of service, it is likely that it will be difficult to continue to get the repair pieces necessary to maintain the system, and that workflow, ergonomic and space planning needs have evolved and changed enough that total replacement may be recommended. This last recommendation covers most of the branches in the Maintain Plan, with the exception of Live Oak, Scotts Valley, and Headquarters. These three locations will receive the maintenance budget described above. It is important to note that workflow and space planning changes can happen faster than 20 years. The Live Oak branch has already relocated staff workstations from the originally planned upstairs office area to the downstairs workroom, so that all staff are co-located on the ground floor. Because this change has already happened and Scotts Valley and Headquarters already have co-located staff on the same level, the maintenance-level recommendations for these branches are appropriate. Additional flexibility at a system-wide level will

be gained if the Library standardizes on one office furniture manufacturer for workstations, including complementary finishes at different branches to enable pieces to be seamlessly relocated to a new site.

Custom Casework. Custom Casework consists of service desks, self-checkout counters, some reader tables, merchandising shelving, and metal shelving end panels. Custom Casework is, for many libraries, a character defining element. Well-made pieces, usually from woods and laminates, can last for many decades. Custom furniture spans a wide range of uses that have very different turnover timescales. Reader tables, a staple of libraries for centuries, have not evolved very much in their general role over the past 100 years, but the functions that they must accommodate have changed notably in the last 10-15 years. Everyone now looks for places to plug in their laptop or device. With proper care and maintenance every 10 years, a reader table can last for 30 years. Certainly, there are examples of tables lasting much longer with excellent care. Display shelving (aka 'browsers') have also changed in the last 20 years to respond to a ever-evolving electronic media material (Beta, VHS, laserdisc, cassette, CD, DVD, audioplayers) marketplace. These are items that have generally very high circulation rates, and very different ways of browsing and merchandising them. Because of these changing needs, some browser shelving may need be replaced for functional reasons on a more frequent (10 year) basis, where other pieces can be refinished and repaired. Circulation desks are another custom casework item that can last for many years with good care, but often require changes more frequently due to changing operational model and service delivery needs. These desks need to be very flexible, and can now occupy a smaller footprint because modern operational models do not keep multiple library staff members anchored to service desks anymore, but rather encourage them to move around the library engaging the public without the barrier of a desk between staff and patron. Generally speaking, with the exception of Scotts Valley, all the libraries have service/circulation desks and browsing shelving that are not meeting 21st century library needs, and have been recommended to be replaced. Because the primary driver for this replacement recommendation is operational in nature, these costs have been generally covered in the Gain Plan scope, and only the complementary maintenance costs have been shown in the Maintain Plan. *For the CMP custom casework budget recommendations vary by facility*.

Metal Shelving. Metal Shelving has long been a mainstay for dense material storage, and is expected to continue to be so for many years to come. With limited care, metal shelving can last indefinitely. Indeed, some branches still have their original shelving. Metal shelving, like office furniture, is modular within a product line from a single manufacturer. The Library has shelving from many different manufacturers, and in at least one case is using second-hand shelving taken from other library systems. The Library staff have done a shelving survey in support of this plan, and have listed the branches that require new metal shelving. Several branches do not require new shelving, including Headquarters. For these branches, it is anticipated that shelving requirements will continue to evolve with changing patterns in patron usage and materials demand. *The CMP recommends that a budget of 10% total shelving replacement every 10 years* be instituted to allow for minor addition, reduction, and reorganization of portions of the main stack shelving to address maintenance and changing needs. This plan has recommended that shelving replacement, when required, be linked in the schedule to a complementary activity. The Maintain Plan has linked shelving replacement to flooring replacement activities at each specific branch. Like office furniture workstations, the Maintain Plan recommends that

all new shelving be procured from the same manufacturer to provide additional flexibility between branches, and that all new shelving have the same neutral paint color.

SCPL Capital Maintenance Backlog. The Maintain plan establishes budgeting levels for capital maintenance items and costs over the next 10 years. It includes deferred maintenance items as well as anticipated life-cycle scheduled capital maintenance items. System wide projected 10 year total cost is approximately $16.5M for Maintain plan items. Of this total approximately $11M is projected within the first five years (FY2014-FY2018) reflecting a significant backlog of deferred maintenance items. This equates to approximately $20/SF/year averaged across the entire system**.** For years 6-10 this drops to approximately half as the CMP identifies approximately $5.5M of capital maintenance needs. This equates to approximately $10/SF/year averaged across the entire system**.**

On-going CMP Needs Past 10 Years. Looking beyond the specific scope of this ten year plan, there will continue to be annual capital maintenance needs. A general rule of thumb is that annual capital maintenance is between 1.5%-3% of the total replacement cost of the building. In 2013 dollars this is equivalent to $6 to $15/sf/year. Budgeting for on-going capital maintenance is a common challenge in municipal contexts. A review of other municipal maintenance budgeting levels was outside of the scope of this project.

CMP Escalation Costs. Standard CMP/CMMS methodology builds escalation into the costs shown in each year work is anticipated to come due. Annual cost escalation for 2014 and 2015 were taken from Engineering News and Record's projections for the next two years. Beyond two years, it is difficult to project cost escalation because market forces are unpredictable. For years 2016 through 2023, a historic cost escalation factor of 3.3% was used. Because cost escalation can become a large factor in the course and scope of a 10 year long plan, it is important to continue to track and adjust the near-term cost escalation, including during the plan implementation phase.

2. GAIN METHODOLOGY:

Scope. The Gain plan focuses on "makeovers" that consist of strategic changes to limited areas of each library branch focused on improving service and operations to better serve the public and adapt to changing needs, technologies, operations. Gain scope is limited to service desk replacement, 'marketplace' display browsing furniture, self-checkout furniture, modifications to metal book shelving, and allowances for signage, and limited areas of paint and carpet. Scope also includes minor demolition and allowances for modifications to walls, electrical, and data. Project area for Boulder Creek, Branciforte, and Live Oak is approximately 1,000SF each, La Selva Beach is 500SF and Downtown approximately 4,000SF with shelving modifications and carpeting for up to 16,000SF. Felton and Capitola have been excluded from the Gain plan, because the Master Plan's direction is to replace these facilities in their entirety (as part of the Attain Plan) rather than make an incremental investment as part of the Gain Plan. Gain project scope also includes facility modifications to implement some of the new SCPL Technology Plan by providing additional power outlets at reader tables and lounge seating. An

allowance for automated materials handling has been applied to all branches except the smallest Garfield Park and La Selva Beach where space limitations and limited circulation make this impractical.

Costs. Project costs include hard costs, soft costs and contingencies. Gain costs were modeled after similar work conducted by Group 4 as part of interior makeover of South San Francisco branch library 2011 and Marin County Free Library's five branch remodels 2013.

The Gain plan costs are shown as a range with high costs including automated materials handling. Costs that are excluded from the Gain Plan include: cost escalation, hazardous materials remediation, staff management, and renewable energy (e.g. photovoltaic systems) that may be acquired through a third party lease-back program.

3. ATTAIN METHODOLOGY:

The Attain plan focuses on building capacity for the future through renovation and new construction projects at several branches: Aptos, Capitola, Downtown, Felton, and Scotts Valley. The proposed levels of renovation and/or new construction vary based on the condition of the existing facility and the ability of the existing building to be renovated and expanded. There are three proposed levels of Attain-level construction:

Recommendation Summary:

Aptos: the Attain low range value represents a major renovation of the existing facility and expands the existing facility with new construction additions. The high budget is new construction of a larger facility.

Capitola: The existing facility cannot be expanded. The low and high budget ends of the budget range both represent new construction, with minimum and maximum recommended square footages.

Downtown: the Attain low range value represents a major renovation of the existing facility.   The high budget is new construction of a facility that is the same size as the existing facility.

Felton: the Attain low and high range values are equal and represent new construction of a larger facility, because there is already a proposed new construction design that has been developed separate from the master plan project scope.

Scotts Valley: the Attain low and high range values are equal, because Attain-level proposal is a Tenant Improvement expansion into the remaining portion of the building. In order to bring the proposed TI expansion portion of the building up to the same level as the existing Library portion will be at the end of its Maintain Plan work, reroofing and HVAC equipment replacement (commensurate with the Maintain Plan work being done on the existing Library) have been added to the Attain Plan scope. The value differences seen on the summary Maintain + Gain + Attain chart in the report are a result of value difference in Gain.

New Construction Costs: This includes demolition of the existing building, construction of a new facility and modifications to the existing site. New construction costs used in this model are $450/GSF for areas greater than 10,000SF and $500/GSF for areas up to 10,000SF. Historic data for library construction costs vary widely due to multiple factors and are strongly influenced by the amount of concurrent construction activity within a given market area as well as labor rates. Based on discussions with Bogard Construction and David Tanza, it was agreed that values used for this project represent a mid-range level cost of construction that is consistent with SCPL's goals and values. This was validated through a review of construction costs on 11 new library projects bid by Bogard in the last eight years, ranging in cost from $350/SF to $700/SF, with an average cost of $482/SF.

Major Renovation Costs: includes demolition existing building equipment and finishes (gutting the building), and the renovation of the entire building (structural seismic retrofit; relocated partitions; new finishes and roofing; and new mechanical, electrical, plumbing, and telecom systems). Major Renovation costs used in this model are $300/GSF, and includes general contractor markups. This value was derived by looking at square foot cost for building sub-systems, using: historic data from Group 4 projects - including the recently completed Palo Alto Downtown Library project, discussions with Bogard and Tanza, and discussions with GWH Construction Cost Consulting – a local firm whose staff has worked on over 30 Bay Area library projects, including multiple San Jose libraries.

Tenant Improvement (TI): includes demolition existing building equipment and finishes (gutting the building), and the renovation of the building interior (relocated partitions; new finishes; and new mechanical, electrical, plumbing, and telecom distribution systems – the electrical service, major HVAC equipment and existing roofing would remain. The existing structural system would remain, with minor modifications). Tenant Improvement costs used in this model are $220/GSF, and were derived using the same methodology as was used for Major Renovation costs. Because the scope of work and affected building sub-systems are less than in a Major Renovation, the costs are appropriately lower. Additionally, some of the sub-system costs were vetted against the estimated costs for the recently completed Scotts Valley Library project.

Site Costs: Site construction for Attain Plan projects was restricted to modifying the site as necessary to provide an interface between the existing parking areas and street access and the new or revised entries. This included modifications to portions of the parking areas, ADA ramps at Aptos to provide an accessible path of travel from the street to the front door, two new utility connections to provide for the increased size of the facilities, and some minor landscape modifications. These site costs are in addition to the building costs listed above.

FFE Costs. In addition to building and site costs, the Attain Plan estimates costs on a square foot basis for furniture, shelving, custom casework, and technology (computers, etc). Automated materials handling is estimated as an allowance and Public Art is estimated as a percentage of the construction cost for building, site, shelving and signage.

Other Project Costs. The sum of Building Costs, Site Costs, FF&E, Signage, Technology and Public Art make up the Construction Budget. Based on this budget, Soft Costs of 30% are estimated, which

include: Design and Engineering; testing, fees and permits; third-party construction management; and moving costs.   The 'Project Budget' includes all of the items listed above, but excludes escalation, hazardous materials remediation, renewable energy installations, and internal staff program management.

Total Project costs for new construction projects are $807/SF for Downtown, $837/SF for Aptos, and $926/SF for Felton.   These costs are in line with other area library construction projects. In 2008, Palo Alto passed a bond measure of approximately $76M for three library projects that included a 9,000SF Major Renovation, a 24,000SF Major Renovation + 5,000SF New Construction, and 57,000SF of new construction for an average project budget of $817/SF. Pacifica's new 36,500SF library has a total project cost of just over $30M or $822/SF in 2012 dollars and Larkspur's new 20,000SF Library and Community Center has a total project cost of $17M or $850/SF in 2013 dollars.

Escalation. Assuming that the project phasing for Gain and Attain plan projects happened in a sequence that allowed for four equal encumbrances of bond funds that were timed approximately two years apart, the combined Gain and Attain cost escalation would range between approximately $10M-$15M.