



LIBRARY JOINT POWERS AUTHORITY BOARD

Monday April 1, 2013  
Downtown Branch Meeting Room  
224 Church Street, Santa Cruz, CA 95060

6:30 PM PUBLIC MEETING

1. ROLL CALL
2. APPROVE AGENDA OF APRIL 1, 2013
3. ORAL COMMUNICATIONS
4. PRESENTATION: ZINIO: ONLINE MAGAZINE APPLICATION
5. MEMBER REPORTS
6. CONSENT AGENDA
  - A. Approve minutes of March 4, 2013 (PG.3-8)
  - B. Approve minutes of March 18, 2013 (PG.9-10)
7. FRIENDS OF THE SANTA CRUZ PUBLIC LIBRARIES REPORT
8. STAFF REPORTS

*INFORMATION ITEMS*

- A. Monthly Narrative Report: March 2013 (PG.11-16)
- B. Statistical Reports (PG.17-20)
- C. February Financial Snapshot (PG.21)

*ACTION ITEMS*

- D. Adoption of Facilities Master Plan (PG.22-24)  
(PDF of plan at end of packet after page 48.  
Bound print copies will be available at the meeting.)

- E. Replacement of Integrated ILS (PG.25-39)
  - i. Approve contract for ILS Consultant
  - ii. Approve Migration Coordinator and related backfill expenditures

9. OTHER BUSINESS

- A. Board Retreat Update (oral)

10. WRITTEN COMMUNICATIONS

- A. Staff Recognition (PG.40-41)
- B. Patron Written Comments (PG.42)
- C. Security Incidents Log (PG.43)
- D. Website Hits (PG.44)
- E. Articles about Santa Cruz and California Libraries (PG.45-47)
- F. Library Audit (PG.48)

11. BOARD MEETING CALENDAR

The Board will consider its current meeting schedule and may revise it as necessary.

12. NEXT MEETING

The next regularly scheduled meeting is Monday, May 6, 2013 at 6:30 pm at the Downtown Branch Library.

13. ADJOURN

The Library Joint Powers Authority Board will adjourn from the regularly scheduled meeting of Monday, April 1, 2013 to the study session on Monday, May 6 at 6:30 pm in the Downtown Branch Library.

The Santa Cruz City-County Library System does not discriminate against persons with disabilities. Out of consideration for people with chemical sensitivities, we ask that you attend fragrance free. Upon request, the agenda can be provided in a format to accommodate special needs. Additionally, if you wish to attend this public meeting and will require assistance such as an interpreter for American Sign Language, Spanish, or other special equipment, please call the Library Administration Office at 427-7706 at least five days in advance so that we can arrange for such special assistance, or email [subfinders@santacruzpl.org](mailto:subfinders@santacruzpl.org).

SANTA CRUZ PUBLIC LIBRARIES  
A CITY-COUNTY SYSTEM

LIBRARY JOINT POWERS BOARD

MINUTES

Aptos Branch Meeting Room  
7965 Soquel Drive, Aptos, CA 95003-3899

March 4, 2013

6:30 PM PUBLIC MEETING

I. ROLL CALL

Present: Supervisor McPherson, Councilmember Mathews, Councilmember Terrazas, Councilmember Reed, Councilmember Termini, Citizen Member English, Citizen Member Dexter, Citizen Member Gerdt

Absent: Supervisor Friend

Staff: Teresa Landers, Library Director  
Marcus Pimentel, Finance Director

II. APPROVAL OF MEETING AGENDA OF MARCH 4, 2013

**Citizen Member English moved, seconded by Councilmember Mathews**

**That the Board approve the Agenda of March 4, 2013**

**UNAN**  
**Absent: Friend**

III. ORAL COMMUNICATIONS

A member of the public expressed concerns over the use of Wi-Fi in the library.

IV. PRESENTATION: August Downtown Branch public art project

Janis O'Driscoll, Division Manager of Programs, Information and Partnerships, gave an update on the Libraries Inside Out project. The photos that had been displayed inside and outside the Downtown branch are now being moved to the Aptos, Live Oak, Branciforte, Scotts Valley and Capitola Branches. Judging by the interest and

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appreciation of the project at the Downtown branch the installations will be very successful in those branches as well. The Festival of Contemporary Music approached the Library to again create a similar project in August to coincide with the festival. The City of Santa Cruz, Cruzio, the Festival of Contemporary Music will be involved and the Arts Commission of Santa Cruz has already pledged \$2000. The Friends of the Library will be involved as well. Calls for designs to artists will be put out on March 20<sup>th</sup>. It promises to be a very exciting project.

V. MEMBER REPORTS

None

VI. CONSENT AGENDA

**Councilmember Termini moved, seconded by Supervisor McPherson**

**That the Board approve the Consent Agenda of March 4, 2013**

**UNAN  
Absent: Friend**

A. Approve Minutes of February 13, 2013

B. Resolution to accept Anna Gruber Trust donation

**That the Board accept the \$56,873.85 pecuniary gift from the Anna Gruber Trust and that it amend the FY 2012-2013 Budget. (Resolution #2013-02)**

**UNAN  
Absent: Friend**

C. Resolution to appropriate Anna Gruber Trust

**That the Board authorize the transfer of \$30,000 from the Anna Gruber Trust and that it amend the FY 2012-2013 Budget. (Resolution #2013-03)**

**UNAN  
Absent: Friend**

## VII. FRIENDS OF THE SANTA CRUZ PUBLIC LIBRARIES REPORT

Cindy Jackson, member of the La Selva Beach Friends and Pete Cullen, President of the Friends, gave an update on the Friends' activities which included:

- Volunteer appreciation brunch at the Downtown Library is scheduled for April
- April 24<sup>th</sup> : all Chamber mixer at the Garfield Park Branch
- May: Retreat
- May 18<sup>th</sup>: outside parking lot spring book sale
- Multimedia sale at the Downtown Library
- Beginning of March: Participation at Capitola Chamber of Commerce
- March 13<sup>th</sup> : Santa Cruz Chamber of Commerce mixer at the Coconut Grove
- Outreach to the business community is ever increasing

## VIII. STAFF REPORTS

- A. Monthly Narrative Report: January 2013.  
There were no additions to the printed January Narrative Report.
- B. Statistical Reports  
Director Landers reported that the issue with circulation statistics is still being looked at. No reliable circulation data is available at this point.
- C. January Financial Snapshot  
Finance Director Marcus Pimentel gave a detailed overview and explanation of the Snapshot report. Finance Director Pimentel reported that January finished positive. Revenues are on target. Sales tax is stronger than estimated. The Library is in a very strong financial position right now. The Board reviewed the report.
- D. Budget Priorities for FY 13/14.  
Director Landers emphasized the priorities for the FY 13/14 Budget: to a) continue the review of the service model adopted in 2011 and b) the implementation of the recommendations provided by the Facilities Master Plan and the IT Strategic Plan. These will be long and short-term recommendations. The Board discussed the Staff Report and Director Landers and Finance Director Pimentel provided additional explanations in response to questions from the Board. Director Landers and her staff will work on developing the details for the FY 13/14 budget.
- E. Status Update: Facilities Master Plan and IT Strategic Plan  
Director Landers gave a brief update on both plans. A Project Management Team meeting (phone conversation with the consultant) took place on March 1<sup>st</sup>. A study session with the Board is confirmed for March 18<sup>th</sup>. The IT Strategic Plan is going well according to plan and the Library's subcontracted

work will be completed in time for consideration and approval of the plan at the next LJPB meeting on April 1<sup>st</sup>.

F. Patron Code of Conduct and Suspension Policy Update

Director Landers provided a short summary of the Patron Code of Conduct. She recommended to not make changes to the policy as approved in December 2012 with regard to service animals. Citizen Member English worked closely with the City Attorney to develop revised and more acceptable language on the sleeping issue. Director Landers recommended approving the revised Rules of Conduct as outlined in the report. The Board discussed the recommendation and expressed confidence in the Library Staff to apply the Rules of Conduct.

A member of the public commented that "sleeping is not a crime".

**Councilmember Reed moved, seconded by Councilmember Mathews**

**That the Board adopt the revised Library Rules of Conduct.**

**UNAN**

**Absent: Friend**

IX. OTHER BUSINESS

A. Board Retreat

Director Landers and Councilmember Terrazas introduced the idea of a Retreat for all LJPB members to discuss the Library's long term financial goals and priorities. The State Library Association offers training on Board Effectiveness specifically geared towards libraries and such training could be part of the Retreat. The Retreat will be held sometime in April or May and two LJPB members and Director Landers will be in charge of planning the event.

**Councilmember Mathews moved, seconded by Councilmember Reed**

**That the Board ask the Staff and Chair to proceed with planning a Board Retreat which includes the Board Training component and to authorize the Chair to designate 2 Board members to be part of the planning.**

**UNAN**

**Absent: Friend**

B. Late opening of all branches on Thursday, March 7

In honor of the Memorial for the fallen Santa Cruz Police officers Director Landers requested that all branches should be opened from 3-7pm on Thursday, March 7<sup>th</sup>, with regular programming being either canceled or rescheduled. This would give staff the opportunity to attend the Memorial either in San Jose or in Santa Cruz. Library staff created a webpage with links to appropriate resources for the community and Director Landers volunteered to help out with the Memorial at the Del Mar Theater.

**Citizen Member English moved, seconded by Supervisor McPherson**

**That the Board approve the late opening hours of all branches on Thursday, March 7**

**UNAN**

**Absent: Friend**

X. WRITTEN COMMUNICATIONS

A. Articles About Santa Cruz and California Libraries

B. Patron Written Comments

C. Articles on Libraries Nation Wide

D. Security Incidents Log

The Board reviewed the Security Incidents Log and commented on the increasing number of incidents at the Branciforte Branch Library. This trend should be carefully watched and perhaps steps need to be taken in the future.

E. Website Hits

F. Staff Recognition

Director Landers pointed out that the Staff Recognition monthly program is made possible with support from the Friends of the Library.

G. Virtual Services Quarterly Report

H. Update regarding by-laws and JPA issues

Director Landers reported that the City Attorney has been consulted and his response presented in the Update. No further Board action is necessary.

A member of the public commented on procedural issues.

XI. BOARD MEETING CALENDAR

No changes

XII. NEXT MEETING

The next regularly scheduled meeting is on Monday, April 1, 2013 at 6:30 pm at the Downtown Branch Library meeting room. A study session on the Facilities Master Plan will be held on Monday, March 18 at 6:00 pm at the Downtown Branch Library.

XIII. ADJOURN

The regular meeting adjourned at 7:25 p.m.

Respectfully submitted,

Helga Smith, Clerk of the Board

All documents referred to in these minutes are available in the Library Office.



SANTA CRUZ PUBLIC LIBRARIES  
A CITY-COUNTY SYSTEM

LIBRARY JOINT POWERS BOARD  
SPECIAL STUDY SESSION

MINUTES

Downtown Branch Meeting Room  
224 Church Street, Santa Cruz, CA 95060

March 18, 2013

6:00 PM PUBLIC MEETING

I. ROLL CALL

Present: Supervisor McPherson, Councilmember Mathews, Councilmember Terrazas,  
Councilmember Reed, Councilmember Termini, Citizen Member English,  
Citizen Member Dexter, Citizen Member Gerdt, Supervisor Friend

Staff: Teresa Landers, Library Director

II. APPROVAL OF MEETING AGENDA OF MARCH 18, 2013

**Councilmember Termini moved, seconded by Supervisor McPherson**

**That the Board approve the Agenda of March 18, 2013**

**UNAN**

III. PUBLIC COMMENT

A member of the public thanked the Board for its decision to revise the Library Code of Conduct.

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IV. STUDY SESSION ON LIBRARY FACILITIES MASTER PLAN  
PRESENTATION: Group4 Architecture, Research and Planning

Director Landers started the evening with an introduction and background information.

David Schnee, Jill Eyres, Jonathan Hartman and Paul Jamtgaard of Group4 Architecture presented a comprehensive draft of the Facilities Master Plan. A final revised version of the plan will be presented at the next LJPB meeting on April 1, 2013.

Two members of the public asked for clarification in regards to parking at the Downtown Branch and the possibility of integrating commercial rental space into the Plan. Susan Muriello, CAO of Santa Cruz County, addressed the financial aspects of the presentation. The Board members continued with comments and questions, which were answered by the Group4 architects.

V. BOARD MEETING CALENDAR

No changes

VI. NEXT MEETING

The next regularly scheduled meeting is on Monday, April 1, 2013 at 6:30 pm at the Downtown Branch Library meeting room.

VII. ADJOURN

The regular meeting adjourned at 7:48 p.m.

Respectfully submitted,

Kira Henifin, Clerk of the Board

All documents referred to in these minutes are available in the Library Office.

## MONTHLY REPORT FOR MARCH 2013

### 1. READING, LISTENING AND VIEWING FOR PLEASURE

**A. Children in Santa Cruz County will enter school ready to read, write, listen and learn.**

**B. All ages will have materials, programs and displays that reflect current community interests and provide pleasurable reading, viewing and listening experiences that help them reach their personal literacy goals.**

Branciforte branch has several special displays for the month of March. Chantel Van Pelt put up a women's history month display in the adult area that focuses on women artists. We also have a display in the children's area for women's history month, with a little quiz asking kids if they know the women portrayed in the poster. There is also a holiday display for Passover, Easter and St. Paddy's day.

We also continue to update our "staff favorite" display. The patrons really seem to like it, since the items are flying off the shelves. The staff has been asking the selectors for some of our favorites that haven't been at Branciforte. The Selectors have been wonderful in filling our requests!!

Capitola branch celebrated Women's history month with two displays by Galina Wells. The first half of the month we had a display of books with subjects pertaining exclusively to women in honor of International Women's Day and for the 2<sup>nd</sup> half of the month there is a display of Women of Mystery celebrating female mystery writers. For our younger audience Jonell Jel'enedra curated a display called GIRL POWER with titles celebrating some of the unique girl protagonists in our children's picture books featuring such titles as Odd Velvet, Super Cilantro Girl and Belinda the ballerina. Both displays have proved to be quite popular as well as our ongoing display of items new to the branch.

Tales to Tails is now at Boulder Creek. Trainer Brenda Berg and her dog Yoli will be a great addition to the branch. Homework Help has become very popular at Boulder Creek. The students love our Homework Helper, Estelle Fein. They have created signs for the branch inviting others to join the club. Some have asked if Estelle can be here EVERY day!

Garfield Park had two displays, a women's history month display, with both adult and juvenile material, and a St. Patrick's day display put together by one of our patrons, complete with books for all ages and clovers.

Live Oak's Patty Carroll made a display for The Big Read (The Grapes of Wrath) featuring books by John Steinbeck and other materials about the Depression era. The children's area has a Women's History display made by Library Aide, Jennifer Hooker with an array of interesting books. La Selva Beach created a "Recommended Reads" display drawing on Staff Picks from our website and patron recommendations. One of our Library Aides, Lucia Corrales, has been applying her artistic talents to a

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bulletin board in the kids' room using, "Reading is dreaming with eyes open" as her inspiration.

At the Scotts Valley branch, March was celebrated with a display of books and journals commemorating women's contributions to history. In the Kid's Spot there was a display about favorite pets.

**C. People of all ages will have friendly support and intuitive access to the materials and resources they want.**

A new online service, IndieFlix, premieres April 1.

*IndieFlix streams thousands of award-winning films from festivals around the world. IndieFlix is dedicated to providing a forum where filmmakers and their audiences can interact, and to building a community that translates artistic vision into commercial success. IndieFlix promises to build a fair and open market to empower filmmakers to be the engine of their achievement, and audiences to be a vital part of a movie's success. We believe that every good movie has an audience*

Staff needs to receive training before there is much publicity. It can be accessed through Internet Resources/Movies/TV/Theater on the SCPL website.

**2. LIFELONG LEARNING**

**A. People will have access to a relevant collection of resources in diverse formats for all ages.**

At the Branciforte branch we are continuing to weed items that no longer circulate or are in poor shape, and asking for new items that our patrons might like to check out.

**B. Library users will have access to innovative and successful programming which reflects the cultural, educational and informational needs of the diverse communities served by SCPL and which will help learners of all ages to achieve their goals.**

March completes the latest 6-week series Memoir Writing Workshop at LSB, led by Gail Burk. Participants rave about this workshop!

The Community Poetry Circle at Scotts valley continues to be well attended by budding poets.

Jeanne O'Grady started the Family Craft at Live Oak on St. Patrick's Day with Irish themed coloring sheets and bookmarks. The program is much appreciated and will be weekly beginning in April.

Summer Reading plans are almost complete. Programming has booked performers for all the branches and regular programming will be on the summer reading theme "Reading Is So Delicious."

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- B. People will have access to innovative technology and the tools necessary to find, evaluate and use information and resources to meet their learning needs.**

### **3. COMMUNITY CONNECTIONS**

- A. The library will initiate and nurture partnerships with the public, private and nonprofit sectors in Santa Cruz County for the mutual benefit of the partners, the library and the community.**

Heather Norquist and Elaine Andersen worked with Baker and Taylor to ensure that 500 copies of the bilingual board book *Libro!=Book!* would be received in time to be distributed by Jeanne O'Grady through the Reach Out and Read program. These books will be paid for with money from the FOSCPL.

For the past several years, Sentinel Printers has graciously cut scrap paper into uniform usable size for the Live Oak Branch for free. We use this paper for our patron hold slips and patron scratch paper. We appreciate their generosity as this saves staff a lot of time!

Led by Volunteers Zena and Amy from SCPL, a group of Americorps volunteers held a phone bank to contact local merchants about participating in Summer Reading. They got many positive responses and gave the program team a clear idea of who to contact and when in the next few weeks. Thanks to all the volunteers.

A second session of Ancestry.com Library Edition workshops were held on March 30 at the Scotts Valley branch. The workshop was offered in partnership with the Santa Cruz County Genealogical Society. While using the library's laptop computers for a hands-on session, participants were guided through the web site by D. Mike Epperson and Janine Charlton.

The Santa Cruz County Human Services Department met with prospective clients at the Scotts Valley branch.

- B. People will strengthen their ties with each other, the community and the library.**

The Branciforte PIC, Lauren Suhd, after talking with a local elementary teacher about book groups he was leading, was able to give him a copy of her book group list of titles that she used during the eight plus years that she led various library book groups. He was very excited to get it. Lauren also gave a middle school teacher a list of some of her favorite J Fiction and Young Adult books. She had produced this list during her 14 years as a children's programming person at the library. That teacher was also very appreciative.

How better to cement ties to the Library than to hold your wedding in one of our facilities. Jacqueline Victoria Dunn and Christopher Robert Caldwell did just that when they rented the Branciforte Library for their wedding and reception. Part of the rental fee paid for staff to be present and for maintenance and janitorial services. We will surely see their children at story time someday. CONGRATULATIONS to the Dunn/Caldwells



LSB has two ongoing book discussion groups. In March the groups discussed “East of the Mountains” by David Guterson and “Wild” by Cheryl Strayed.

The month of Steinbeck ended Wednesday March 27. As of Tuesday March 26, 1488 people attended events. Michael Oakes, an actor who does a one-man Steinbeck show, spent a week visiting schools and presented his show to the public as well. Last week we had one of our book discussions at Bookshop Santa Cruz and heard from people with Depression-era family stories from Oklahoma, Missouri, and California. The parallels between the 1930’s and 2013 are all too familiar

**C. The community will recognize the value of SCPL in improving their lives and will recognize SCPL as an asset to their community.**

Brenda McIlroy reports that PAPAS was wild as usual. The dads really got into making rubber band cars, with lots of different multi-band powered models. We had colorful wheels, stickers everywhere, and some interesting body designs. In the races afterwards there was a different winner every time.

New art is going up at the Downtown Branch at the end of March and it will focus on bird imagery and feature 11 artists. We’ll be participating in the April First Friday on April 5 from 5:30-8pm.

**D. Volunteers will be used effectively.**

The Aptos Branch is very lucky to have our volunteer Robbie Rohac who works on Monday mornings. She spends 2 hours completing our pull list for holds and then stays beyond her regular shift for 2 more hours and helps with shelving. This is such a big help

especially at the beginning of the week. Congrats to Robbie for being such an outstanding volunteer.

The Branciforte Branch had a young man volunteer for a few weeks who was an expert in office organizing. He started work on clearing up/organizing the back room, which really needed it. There is still work to do, but the staff now has a good sense of how to proceed.

Boulder Creek now has a young adult volunteer Storytime Assistant so Kari Gunn, our storyteller, and our storytime families, can continue to meet in our children's room instead of the meeting room.

Garfield Park has a young adult volunteer who was taught how to replace covers on books and has become quite the expert at it. She has given new life to many of our books.

#### **4. WELCOMING PLACE**

**A. Identify the physical changes and funding required to provide 21<sup>st</sup>-century library facilities.**

Boulder Creek passed its semi-annual fire alarm inspection with flying colors.

A study session was held with the Board to review the draft of the Facilities Master Plan. Questions and concerns are being addressed in the final version.

**B. The virtual branch meets the definition of a welcoming place.**

Many Garfield Park patrons are very excited when they learn of the many databases they can access from home.

**C. People receive service at the level they need and want.**

Kevin Hildreth, at the Branciforte branch was able to spend an extended bit of time helping a disabled adult learn about how to use the internet and the catalog. Kevin's patience and clear directions were greatly appreciated by the patron, who has often been very frustrated trying to navigate our system. The rest of the staff looked on in awe at Kevin's patience.

#### **5. FINANCIAL SUSTAINABILITY**

**A. The library system maintains a healthy and stable financial position.**

The FY11/12 audit was received and it was "good and clean".

**B. There is adequate, stable and diverse funding to finance ongoing operations, key strategic initiatives and capital projects.**

A Board designated team met to discuss the logistics and content for a financial planning retreat; most likely to be held in May.

- C. **Services of a defined level and quality are consistently delivered based on revenue projections and supportive organizational and operating structure.**
- D. **The library operates efficiently and focuses on continual improvement.**

## **6. ORGANIZATIONAL READINESS**

- A. **Staff receives adequate training to do their jobs effectively.**  
Heather Norquist attended the InfoPeople webinar “Ebooks and Libraries: Legal Issues for Administrators”.

David Addison, PIC at the Aptos Branch attended an iPads in the Library workshop offered by MOBAC on Friday March 22<sup>nd</sup>. The workshop is designed to help the many patrons who come into the library needing help navigating digital downloads and how to make their iPad more library friendly.

Another session of staff E-reader trainings took place on three Thursday mornings during March taught by our co-workers who also conduct the public E-reader classes.

- B. **SCPL is committed to developing current library staff to become tomorrow’s library leaders.**

Denise Fritsch, Volunteer Coordinator, attended a meeting of Directors of Volunteers in Associations (DOVIA) Silicon Valley. She is currently the Co-Chair.

- C. **Employees have the skills to execute change and are committed to change and continual improvement.**  
The Aptos Branch hosted the monthly Skill Share workshop for staff on the 27<sup>th</sup> of March from 8:30-10:30am. Staff members discussed the many resources available for readers advisory.
- D. **A customer-driven service philosophy guides staff training and development.**



MONTHLY STATISTICAL REPORT  
FY12/13

	Circulation			Visitors			Circ/Vis			Visitors/Open Hr		
	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change
January												
Aptos	23,695		-100%	10,317	12,016	16%	135		-100%	59	65	11%
Boulder Creek	4,181		-100%	2,272	2,800	23%	35		-100%	19	19	-1%
Branciforte	8,914		-100%	5,842	8,105	39%	74		-100%	49	56	16%
Capitola	9,436		-100%	5,440	6,740	24%	68		-100%	39	43	8%
Downtown	53,475		-100%	31,902	35,618	12%	248		-100%	148	158	7%
Felton	2,826		-100%	1,587	1,768	11%	34		-100%	19	15	-22%
Garfield Park	2,954		-100%	2,688	3,658	36%	37		-100%	34	32	-4%
La Selva Beach	1,521		-100%	1,547	1,509	-2%	18		-100%	18	13	-32%
Live Oak	13,598		-100%	8,493	9,979	17%	116		-100%	73	66	-10%
Scotts Valley	20,818		-100%	14,760	15,082	2%	118		-100%	84	82	-2%
Outreach	2,917		-100%	1,370	1,228	-10%						
Subtotal	144,335	0	-100%	86,218	98,503	14%	883	0	-100%	541	549	1%
ebooks	11,420	7,552	-34%									
e-audio	900	1,399	55%									
TOTAL	156,655	8,951	94%	86,218	98,503	14%	883	0	-100%	541	549	1%
website hits	527,072	519,384	-1%	127,092	128,689	1%						
<p>Note: We have recently discovered that the circulation statistics reported beginning in January 2012 may not be accurate. We are working on correcting this and it will be a couple more months before this is resolved. Until then we are suspending reporting of circulation statistics.</p>												
February												
Aptos	22,640		-100%	10,800	10,759	0%	129		-100%	61	64	4%
Boulder Creek	4,547		-100%	2,934	2,812	-4%	39		-100%	25	21	-14%
Branciforte	8,289		-100%	6,913	7,393	7%	70		-100%	59	58	-1%
Capitola	9,271		-100%	5,964	6,241	5%	66		-100%	42	43	2%
Downtown	49,729		-100%	33,503	32,025	-4%	230		-100%	155	155	0%
Felton	2,520		-100%	1,744	1,411	-19%	30		-100%	21	13	-37%
Garfield Park	2,929		-100%	2,780	2,873	3%	37		-100%	35	28	-19%
La Selva Beach	1,335		-100%	1,851	1,930	4%	16		-100%	22	18	-19%
Live Oak	12,420		-100%	9,024	8,770	-3%	104		-100%	75	64	-14%
Scotts Valley	19,913		-100%	13,485	14,771	10%	113		-100%	77	88	15%
Outreach	2,633		-100%	1,232	1,345	9%						
Subtotal	136,226	0	-100%	90,230	90,330	0%	833	0	-100%	572	553	-3%
ebooks	11,957	8,891	-26%									
e-audio	952	1,271	34%									
TOTAL	149,135	10,162	-93%	90,230	90,330	0%	833	0	-100%	572	553	-3%
website hits	512,433	462,791	-10%	122,298	117,217	-4%						
<p>Note: We have recently discovered that the circulation statistics reported beginning in January 2012 may not be accurate. We are working on correcting this and it will be a couple more months before this is resolved. Until then we are suspending reporting of circulation statistics.</p>												

MONTHLY STATISTICAL REPORT  
FY12/13

	Circulation			Visitors			Circ/Open Hr			Visitors/Open Hr		
	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change
November												
Aptos	20,655		-100%	8,659	12,792	48%	125		-100%	53	76	45%
Boulder Creek	3,972		-100%	1,937	2,971	53%	44		-100%	21	23	6%
Branciforte	7,452		-100%	4,895	7,021	43%	96		-100%	63	55	-13%
Capitola	8,307		-100%	4,628	5,889	27%	87		-100%	49	41	-16%
Downtown	47,641		-100%	28,005	31,854	14%	234		-100%	138	154	12%
Felton	2,372		-100%	821	1,568	91%	36		-100%	13	15	15%
Garfield Park	2,392		-100%	2,358	3,578	52%	31		-100%	30	35	16%
La Selva Beach	1,245		-100%	1,048	1,532	46%	21		-100%	17	14	-18%
Live Oak	13,403		-100%	8,558	7,881	-8%	103		-100%	66	58	-12%
Scotts Valley	19,068		-100%	12,403	13,911	12%	129		-100%	84	83	-2%
Outreach	2,721		-100%	1,208	1,505	25%						
<b>Subtotal</b>	<b>129,228</b>	<b>0</b>	<b>-100%</b>	<b>74,520</b>	<b>90,502</b>	<b>21%</b>	<b>906</b>	<b>0</b>	<b>-100%</b>	<b>533</b>	<b>553</b>	<b>4%</b>
ebooks	6,686	11,184	67%									
e-audio	857	2,103	145%									
<b>TOTAL</b>	<b>136,771</b>	<b>13,287</b>	<b>-90%</b>	<b>74,520</b>	<b>90,502</b>	<b>21%</b>	<b>906</b>	<b>0</b>	<b>-100%</b>	<b>533</b>	<b>553</b>	<b>4%</b>
website hits	416,930	355,157	-15%	105,162	103,504	-2%						
<i>Note: We have recently discovered that the circulation statistics reported beginning in January 2012 may not be accurate. We are working on correcting this and it will be a couple more months before this is resolved. Until then we are suspending reporting of circulation statistics.</i>												
December												
Aptos	20,468		-100%	7,953	10,239	29%	124		-100%	48	62	28%
Boulder Creek	3,224		-100%	1,517	2,900	91%	35		-100%	17	22	34%
Branciforte	6,737		-100%	4,095	7,021	71%	86		-100%	53	57	8%
Capitola	8,389		-100%	4,591	5,884	28%	88		-100%	48	42	-13%
Downtown	46,660		-100%	25,751	31,511	22%	229		-100%	126	151	19%
Felton	2,600		-100%	932	2,463	164%	40		-100%	14	23	61%
Garfield Park	2,639		-100%	2,866	3,343	17%	34		-100%	37	34	-6%
La Selva Beach	1,259		-100%	1,241	1,166	-6%	21		-100%	20	11	-46%
Live Oak	12,046		-100%	7,365	8,623	17%	93		-100%	57	65	15%
Scotts Valley	16,065		-100%	9,176	13,004	42%	109		-100%	62	78	26%
Outreach	2,295		-100%	1,102	1,181	7%						
<b>Subtotal</b>	<b>122,382</b>	<b>0</b>	<b>-100%</b>	<b>66,589</b>	<b>87,335</b>	<b>31%</b>	<b>859</b>	<b>0</b>	<b>-100%</b>	<b>483</b>	<b>545</b>	<b>13%</b>
ebooks	10,656	10,168	-5%									
e-audio	893	1,349	51%									
<b>TOTAL</b>	<b>133,931</b>	<b>11,517</b>	<b>-91%</b>	<b>66,589</b>	<b>87,335</b>	<b>31%</b>	<b>859</b>	<b>0</b>	<b>-100%</b>	<b>483</b>	<b>545</b>	<b>13%</b>
website hits	432,813	461,921	7%	106,311	111,531	5%						
<i>Note: We have recently discovered that the circulation statistics reported beginning in January 2012 may not be accurate. We are working on correcting this and it will be a couple more months before this is resolved. Until then we are suspending reporting of circulation statistics.</i>												

MONTHLY STATISTICAL REPORT  
FY12/13

September	Circulation			Visitors			Circ/Open Hr			Visitors/Open Hr		
	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change
Aptos	17,478	23,703	36%	10,565	12,030	14%	108	136	28%	64	69	8%
Boulder Creek	2,717	3,943	45%	2,285	2,676	17%	30	30	0%	25	20	-19%
Branciforte	5,068	8,700	72%	4,489	6,573	46%	65	68	5%	58	51	-11%
Capitola	7,851	10,872	38%	4,945	4,776	-3%	82	74	-10%	52	32	-37%
Downtown	33,038	46,868	42%	28,816	35,410	23%	162	215	33%	141	162	15%
Felton	1,526	2,174	42%	1,088	1,532	41%	23	21	-12%	17	15	-13%
Garfield Park	2,211	2,986	35%	2,727	3,022	11%	28	31	9%	35	31	-11%
La Selva Beach	941	1,675	78%	1,178	1,372	16%	16	16	3%	19	13	-33%
Live Oak	11,145	14,612	31%	7,759	8,281	7%	86	109	27%	60	62	4%
Scotts Valley	17,717	24,161	36%	13,255	13,970	5%	120	139	15%	90	80	-11%
Outreach	2,471	3,047	23%	1,567	1,408	-10%						
Subtotal	102,163	142,741	40%	78,674	91,050	16%	719	838	17%	561	537	-4%
ebooks	9,502	6,868	-28%									
e-audio	1,106	2,373	115%									
TOTAL	112,771	151,982	35%	78,674	91,050	16%	719	838	17%	561	537	-4%
website hits	356,449	421,268	18%	104,316	118,499	14%						
<p>Note: We have recently discovered that the circulation statistics reported beginning in January 2012 may not be accurate. We are working on correcting this and it will be a couple more months before this is resolved. Until then we are suspending reporting of circulation statistics.</p>												
October	Circulation			Visitors			Circ/Open Hr			Visitors/Open Hr		
	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change
Aptos	12,938		-100%	8,094	12,030	49%	79	0	-100%	49	60	23%
Boulder Creek	3,092		-100%	2,346	3,235	38%	34	0	-100%	26	22	-14%
Branciforte	5,290		-100%	4,807	7,345	53%	68	0	-100%	62	51	-17%
Capitola	7,428		-100%	4,829	5,297	10%	78	0	-100%	51	33	-34%
Downtown	34,463		-100%	26,728	35,642	33%	169	0	-100%	131	147	12%
Felton	1,462		-100%	971	1,663	71%	22	0	-100%	15	14	-6%
Garfield Park	2,054		-100%	2,629	3,368	28%	26	0	-100%	34	27	-20%
La Selva Beach	914		-100%	1,089	2,162	99%	15	0	-100%	18	18	0%
Live Oak	13,316		-100%	8,291	9,022	9%	102	0	-100%	64	54	-16%
Scotts Valley	23,981		-100%	12,710	14,442	14%	163	0	-100%	86	72	-16%
Outreach	2,838		-100%	1,845	1,615	-12%						
Subtotal	107,776	0	-100%	74,329	95,821	29%	757	0	-100%	535	498	-7%
ebooks	8,390	9,308	11%									
e-audio	968	2,593	168%									
TOTAL	117,134	11,901	-90%	74,329	95,821	29%	757	0	-100%	535	498	-7%
website hits	279,066	450,622	61%	93,140	127,971	37%						
<p>Note: We have recently discovered that the circulation statistics reported beginning in January 2012 may not be accurate. We are working on correcting this and it will be a couple more months before this is resolved. Until then we are suspending reporting of circulation statistics.</p>												

MONTHLY STATISTICAL REPORT  
FY12/13

July	Circulation			Visitors			Circ/Open Hr			Visitors/Open Hr		
	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change
Aptos	17,814	24,930	40%	10,307	11,500	12%	108	135	25%	63	63	0%
Boulder Creek	2,920	4,017	38%	2,006	2,601	30%	32	36	12%	22	23	5%
Branciforte	5,148	8,013	56%	5,452	6,666	22%	66	70	6%	70	58	-16%
Capitola	8,207	10,919	33%	4,606	5,023	9%	86	85	-2%	48	39	-19%
Downtown	39,290	50,400	28%	30,825	36,090	17%	193	220	14%	151	158	4%
Felton	1,843	2,224	21%	1,258	1,445	15%	28	28	-2%	19	18	-7%
Garfield Park	2,267	3,531	56%	2,208	3,143	42%	29	42	45%	28	37	32%
La Selva Beach	812	1,692	108%	1,391	1,760	27%	13	21	58%	23	22	-4%
Live Oak	12,695	16,594	31%	8,364	9,374	12%	98	129	32%	64	73	13%
Scotts Valley	19,514	27,040	39%	n/a	13,794		132	147	11%		75	
Outreach	2,096	3,018	44%	1,436		-100%						
<b>Subtotal</b>	<b>112,606</b>	<b>152,378</b>	<b>35%</b>	<b>67,853</b>	<b>91,396</b>	<b>35%</b>	<b>786</b>	<b>913</b>	<b>16%</b>	<b>489</b>	<b>566</b>	<b>16%</b>
ebooks	5,990	4,533	-24%									
e-audio	1,103	1,204	9%									
<b>TOTAL</b>	<b>119,699</b>	<b>158,115</b>	<b>32%</b>	<b>67,853</b>	<b>91,396</b>	<b>35%</b>	<b>786</b>	<b>913</b>	<b>16%</b>	<b>489</b>	<b>566</b>	<b>16%</b>
website hits	367,712	518,988	41%	107,311	128,789	20%						
<p>Note: We have recently discovered that the circulation statistics reported beginning in January 2012 may not be accurate. We are working on correcting this and it will be a couple more months before this is resolved. Until then we are suspending reporting of circulation statistics.</p>												
August	Circulation			Visitors			Circ/Open Hr			Visitors/Open Hr		
	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change	FY 11/12	FY 12/13	%change
Aptos	17,711	25,067	42%	9,932	11,719	18%	108	127	18%	60	59	-2%
Boulder Creek	3,102	4,285	38%	2,409	2,661	10%	34	33	-3%	26	21	-22%
Branciforte	5,051	8,256	63%	4,981	6,692	34%	65	65	0%	64	52	-18%
Capitola	8,049	11,449	42%	5,357	4,935	-8%	84	75	-11%	56	32	-43%
Downtown	39,540	48,852	24%	32,543	35,379	9%	194	203	4%	160	147	-8%
Felton	1,563	2,263	45%	1,242	1,349	9%	24	25	2%	19	15	-23%
Garfield Park	2,597	3,223	24%	2,977	2,748	-8%	33	35	5%	38	30	-22%
La Selva Beach	858	1,673	95%	1,074	1,120	4%	14	18	29%	18	12	-31%
Live Oak	13,487	15,138	12%	9,354	8,574	-8%	104	114	10%	72	64	-10%
Scotts Valley	20,655	24,915	21%	14,217	12,404	-13%	140	126	-10%	96	63	-35%
Outreach	2,673	2,985	12%	1,492	1,454	-3%						
<b>Subtotal</b>	<b>115,236</b>	<b>148,106</b>	<b>28%</b>	<b>85,578</b>	<b>89,036</b>	<b>4%</b>	<b>800</b>	<b>819</b>	<b>2%</b>	<b>610</b>	<b>495</b>	<b>-19%</b>
ebooks	5,684	5,697	0%									
e-audio	1,171	2,110	80%									
<b>TOTAL</b>	<b>122,141</b>	<b>155,913</b>	<b>28%</b>	<b>85,578</b>	<b>89,036</b>	<b>4%</b>	<b>800</b>	<b>819</b>	<b>2%</b>	<b>610</b>	<b>495</b>	<b>-19%</b>
website hits	382,678	512,829	34%	111,546	126,192	13%						
<p>Note: We have recently discovered that the circulation statistics reported beginning in January 2012 may not be accurate. We are working on correcting this and it will be a couple more months before this is resolved. Until then we are suspending reporting of circulation statistics.</p>												



TO: Finance Committee- Library Joint Powers Authority Board  
 FROM: Marc Pimentel, Finance Director  
 DATE: March 21, 2013  
 RE: Monthly Dashboard Report: Library's February 2013 financials

Contained herein is the February 2013 Dashboard summary report. In general, revenues remain slightly ahead of budget by 2.2% and expenditures are under budget by 6.9%. This has resulted in a year-to-date net operating gain of \$1,087,901. If current revenue and payroll budgetary savings trends continue, but unspent operating costs are incurred or carried over into next year, annualized net gains for the current year could exceed \$810,000.

This "dashboard" summary includes only major revenue and expenditure lines items that are key to monitoring operating trends and allow us to provide a 1pg summary report. Items not reported individually but included in the "Other expenditures" line item below include contractually obligated accounts such as debt service, software licensing fees, and admin support (management, personnel, accounting, budgeting, payroll, etc.).

Net operations (Major accounts)	Actual Results				Year to Date		Percent of Budget Comparison			
	December		January		February		Annual Budget FY 2012/13	YTD Actuals	Months completed	Positive / (negative)
<b>Revenue:</b>										
Sales Tax	\$ 652,350	\$ 438,501	\$ 569,563	\$ 4,323,793			\$ 5,991,473	72.2%	66.7%	5.5%
MOE- Member Contributions	425,076	425,076	425,076	3,400,606			5,149,416	66.0%	66.7%	(0.6%)
Library Fines	12,176	23,662	17,623	137,031			200,000	68.5%	66.7%	1.8%
Donations- Friends	150	-	-	7,261			70,000	10.4%	66.7%	(56.3%)
Other Revenue	2,160	11,359	4,682	56,888			96,745	58.8%	66.7%	(7.9%)
<b>TOTAL REVENUE</b>	<b>\$ 1,091,911</b>	<b>\$ 898,598</b>	<b>\$ 1,016,944</b>	<b>\$ 7,925,579</b>			<b>\$ 11,507,634</b>	<b>68.9%</b>	<b>66.7%</b>	<b>2.2%</b>
<b>Expenditures:</b>										
Payroll	602,144	547,150	563,836	4,588,886			7,574,988	60.6%	66.7%	6.1%
Books (w/Grants)	81,299	63,039	36,450	622,898			909,826	68.5%	66.7%	(1.8%)
Janitorial Services	11,369	9,788	9,222	76,370			117,097	65.2%	66.7%	1.4%
Building & Facility	16,276	16,983	18,840	102,801			154,752	66.4%	66.7%	0.2%
Rent (Equip, Building, Land)	49,700	25,934	25,670	208,738			312,409	66.8%	66.7%	(0.1%)
Utilities	25,339	33,163	22,094	237,710			312,410	76.1%	66.7%	(9.4%)
Other expenditures	72,173	122,265	122,373	1,000,275			2,056,871	48.6%	66.7%	18.0%
<b>(3) TOTAL EXPENDITURES</b>	<b>\$ 858,300</b>	<b>\$ 818,323</b>	<b>\$ 798,484</b>	<b>\$ 6,837,678</b>			<b>\$ 11,438,353</b>	<b>59.8%</b>	<b>66.7%</b>	<b>6.9%</b>
<b>Net Gain / (Loss)</b>	<b>\$ 233,611</b>	<b>\$ 80,275</b>	<b>\$ 218,460</b>	<b>\$ 1,087,901</b>			<b>\$ 69,281</b>			
	December	January	February	Year to Date			Annual Budget			


Key Balance Sheet Items	Key Operating Indicators			Status
	December	January	February	
Cash	\$ 2,059,941	\$ 2,311,392	\$ 3,369,688	"Current" assets vs Short Term liabilities (Over 2 is good) 95.8
Total Current Assets	3,157,380	3,194,823	3,388,863	"Current" assets vs Long Term liabilities (Over 1 is good) 12.9
Short Term Debt	111,167	67,025	35,390	Cash vs Budgeted Revenue (10% was goal by FY16/17) 29.3%
Long Term Debt (City of SC)	307,170	262,011	262,011	

**Notes:**

- (1) Added the category "building repairs" to this line item (includes building "O & M" and now "Repairs").
- (2) Other expenditures are currently under budget by approximately 370,000. These costs are anticipated to be fully incurred or carried over into the next fiscal year.
- (3) Budgeted expenditures increased by \$296,619 from the Adopted Budget for prior year project carry-overs, from Board direction, and from minor corrections.

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# STAFF REPORT

DATE: March 27, 2013  
TO: Library Joint Powers Board  
FROM: Teresa Landers, Director of Libraries   
RE: Facilities Master Plan

## RECOMMENDATION:

1. LJPB adopts report
2. Provide direction to Library Director on "next steps" identified in this staff report

## SUMMARY

Attached is the final Facilities Master Plan as prepared by Group 4 Architecture, Research + Planning. Recommendations regarding capital maintenance as well as improvements needed for all of SCPL's facilities are included. Estimated costs and criteria to consider when phasing the projects are also included. Finally, next steps in order to implement the plan are provided.

## BACKGROUND

The LJPB commissioned a facilities master plan as part of the Compromise Service Model; adopted in April 2011. The planning process began in August 2012 and a draft of the plan was presented in a study session with the LJPB on March 18, 2013.

The contract was awarded to Group4 Architecture, Research + Planning with the following charges:

1. Review all the facilities and develop a plan for basic maintenance that keeps all 11 fixed facilities open and able to operate.
2. Review all the facilities for their ability to support the new service model and make recommendations for small scale changes as well as identify larger scale changes needed.
3. Develop a methodology for determining specific projects and their phasing.

The process followed by Group4 included:

1. Life cycle analysis, review of floor plans and equipment/system records and cursory physical examination.
2. Do an in-depth study of 2-3 facilities and develop recommendations for more extensive changes
3. Work with a staff based project management team
4. Conduct two Board sessions and one session with the Library Friends

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5. Meet with staff stakeholders in the four jurisdictions- Cities of Santa Cruz, Capitola and Scotts Valley and County of Santa Cruz.

Specifically not included in the scope of this report:

1. Community stakeholder involvement at this stage given the large amount of stakeholder participation that has occurred during the recent Strategic Planning and Alternative Service Model Task Force processes.
2. Financing options

## **DISCUSSION**

The attached report provides the detail for the discussion section. Only highlights are included here as well as recommended next steps.

Key findings include:

1. SCPL facilities are an average of 40 years old with an obvious lack of attention; resulting in pent up demand for basic capital maintenance.
2. The population served by SCPL is very mobile and all branches are used by everyone.
3. Overall square footage is not grossly inadequate and a moderate increase in identified locations will be sufficient to meet demand.
4. Two facilities must be replaced and are not worth anything more than minimal investment to keep operating until new facilities can be built; Felton and Capitola. Capitola is also too small to meet the current demand it enjoys.
5. Aptos and to a lesser extent, Scotts Valley, are also too small for the level of use they are currently experiencing.
6. Downtown is in need of major renovation or replacement in order to adequately provide services expected by the community. Many system wide functions and services are provided by the Downtown branch such as local history, and storage of research materials (i.e. historical runs of magazines and newspapers).
7. Only Scotts Valley is designed to function with the new service model in mind with the result that efficiencies promised in the new model have not been fully realized.

The information provided in the Facilities Master Plan is just the beginning. It provides the foundation on which a number of important decisions must be made in order to support a 10 branch library system in Santa Cruz County. The following next steps are recommended for adoption by the LJPB:

1. Adopt the Facilities Master Plan as presented
2. At the Financial Planning Retreat currently being scheduled for late April or early May:
  - a. Review revenues and other resources, expenses and other needs and financial projections.
  - b. Delve more deeply into debt strategy options
  - c. Begin to understand financial options related to implementing the facilities master plan

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3. Establish a Board committee to continue the work that begins at the retreat in order to:
  - a. Recommend specific projects where the plan provides options
  - b. Recommend phasing of projects
  - c. Establish more precise funding needs based on decisions made in “a” and “b” above.
  - d. Work with a financial advisor to identify specific funding options
  - e. Poll the community to decide on the best option among those identified in “d” above. The consultant who assists with this polling will also be able to assist in recommending an overall strategy to pursue.
  - f. Devise a plan to move forward with implementation of recommendations in “e” above.

(Note: Alternate or additional “next steps” may be identified by the LJPB at the retreat.)



## STAFF REPORT

DATE: March 26, 2013  
TO: Library Joint Powers Board  
FROM: Teresa Landers, Director of Libraries <sup>TL</sup>  
RE: Replacement of Integrated Library System (ILS)

### RECOMMENDATION:

1. Approve contract for consultant to assist in selection and negotiations for a new ILS
2. Approve recommendation to allocate staff to coordinate the project.

### SUMMARY

The Library Technology Plan is under development and is expected to be completed by June. In the interim, it is advisable to move forward on one of the primary recommendations, which is to migrate to a new Integrated Library System as soon as is reasonable. Progress towards this goal can be accomplished by approving the contract with a consultant for assistance in this process and approving a slight realignment of staff to assist.

### BACKGROUND

In January 2012 the Library agreed to coordinate with the City of Santa Cruz (City) on the development of a Technology Strategic Plan as the City was also planning to do an IT Strategic Plan. The Library Joint Powers Agreement provides for administrative services to be provided by the City of Santa Cruz which includes Human Resources and Financial Services. These services are very technology dependent, and the Library and City need to work closely on integrating these core functions. This was also seen as an opportunity for both organizations to identify areas where they might be able to provide mutual support and maximize cost effectiveness through cooperation. The composite plan is expected to include a discussion of the business applications appropriate for the Library and how those should best be delivered. Analyses of the network infrastructure and organizational structure of both the City and the Library's Information Technology departments will be conducted to determine that services are being delivered as efficiently and effectively as possible.

The Library Technology Plan is expected to be completed by June with preliminary financial information available to be considered as part of the LJPB's financial planning retreat and its discussions about the FY13/14 budget.

One aspect of the plan that needs to move forward is the Integrated Library System (ILS) as the current system is experiencing failures and is impeding full implementation of the

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efficiencies which formed the basis for the new service model. The procurement and implementation processes can be coordinated with the development of the final plan.

## **DISCUSSION**

The Library's Technology Consultant has closely examined the needs of the Library System with regard to its core business application, the ILS, and has made the following observations and recommendations:

The ILS, is, perhaps, the single most important technological resource of the library. The business operations of the library depend on the ILS, and like the library's data network, the ILS touches all patrons and staff in some manner.

In October, 2011, the Santa Cruz Public Libraries adopted an "open source" ILS called Evergreen. The base software in open source software is "free," although many libraries, including SCPL, contract with a vendor for assistance. The "free" in open source represents "freedom" for the library to have the opportunity to develop the software to meet its needs. Open source can also be considered free as in a "free box of puppies" – meaning not only fun and great potential, but also great responsibility.

While open source ILSs indeed offer great potential, they are also, quite literally, works in progress. Some features such as circulation perform robustly, while others such as reports, acquisitions, and catalog searching perform poorly or not at all.

During the discovery phase of the technology planning process, the technology planning team discussed the pros and cons of Evergreen in great detail. The implementation of Evergreen has a history of issues at SCPL, including service outages, workarounds requiring many staffing hours to address, and complaints from patrons and staff alike on system performance.

Although the base source code for the software is free, there are hard and soft costs associated with open source. A best practice when working with open source is to recognize that the institution is beyond being a consumer of software and services – and is actually becoming a software developer. When recognizing the developer role, organizations can be successful by investing the time and resources needed to write code, test, and create new and better version of the software customized to the needs of the organization.

The hard costs in open source are mostly around support – essentially, library or contract staff --- whose primary role is to modify and "build" the open-source software in a custom fashion to meet the needs of the library. Even with the library's support contract with the vendor Equinox, SCPL's experience has shown that there are a great many areas of need that fall outside of Equinox's scope. If the library were to attempt software development outside of its contract with

Equinox, those changes would not be supported by Equinox, which offers further complications in terms of normal software upgrades.

At a minimum, the recommendation would be to hire two on staff programmers to write and adapt code in order to make the Evergreen system able to meet SCPL needs. The estimated cost of each programmer would be \$100,000 per year. The purchase of a proprietary system would cost about \$300,000 for initial implementation and then \$65,000 per year for annual maintenance and software upgrades. It is clear to see that by year two, the proprietary model is the more fiscally responsible one:

TYPE OF SYSTEM	YEAR ONE COST ESTIMATES	YEAR TWO COST ESTIMATES	YEAR THREE COST ESTIMATES	TOTAL 3 YEAR COST ESTIMATES
Evergreen	\$200,000	\$200,000	\$200,000	\$600,000
Commercial Vendor	\$300,000	\$ 65,000	\$ 65,000	\$430,000

The consultant, thereby, recommends that the Library pursues a proprietary system in the service of improved ILS performance for patrons and staff alike.

The objectives for this goal include several major concerns – including diligence in selecting a new ILS and equal diligence in maintaining performance and stability from Evergreen prior to transition. Another major area addressed is staff training and comfort on the new system.

The report goes on to recommend specific action steps to achieve the goal of a fully functional ILS. The current ILS has become extremely unstable in the past couple of months, which creates a sense of urgency to begin the process. Since the process for procuring and implementing a new system will take 10-11 months from start to finish, it is important to begin the process as soon as possible since everyone is in agreement about this particular recommendation.

The steps to procuring a new ILS include:

1. Identifying staff and patron needs
2. Writing a RFP that accurately reflects those needs
3. Evaluating the responses and distinguishing between promises and deliverables
4. Negotiating a contract that represents the Library's best interests
5. Installing a new system and migrating the data to it
6. Training staff and public on the new system

Steps one through four will be best accomplished by hiring a consultant who knows the various systems available and understands SCPL's needs in order to make the best match for the best price. Several known and highly recommended consultants were contacted, and the best proposal came from the Quipu Group, specifically Melissa Stockton. The

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Quipu group has been very involved in library initiatives such as the Discover and Go Museum Pass program in which we participate. The proposal from the Quipu Group and contract are attached. Melissa's qualifications and what she is proposing are well defined in those documents. Melissa is able to start as soon as the contract is signed.

All the steps outlined above are also going to require a great deal of staff involvement from all areas of the Library. Much of the process is not technical and will not actually involve Library IT staff. During the last migration, a librarian was assigned the position of Migration Coordinator. Since the restructuring and reduction in staff, this position cannot be absorbed without having an impact on direct public service. A staff member with a great deal of experience in Circulation and who is very involved with Evergreen has been identified as an excellent choice to fill the proposed Migration Coordinator position from April 2013 through one month past migration (approximately 11-12 months). His new responsibilities are mostly within his existing job description, so a special project designation will suffice and will cost \$3,000 for special project pay. (In addition, the current ILS Administrator will be involved in keeping Evergreen as stable as possible during the coming year.)

His current management responsibilities will be handled by the Onsite Services Manager, but his public desk duties need to be backfilled. Several options have been explored, and the most cost effective is to hire a temporary Library Assistant II at an annual cost of about \$23,000.

For both positions, the costs for this current fiscal year (\$5,000) can be absorbed by the current budget, and the additional costs for FY13/14 (\$21,000) will be included in the proposed budget for next year.

The Consultant and the Migration Coordinator will provide excellent leadership to guide the Library through this multi-phase process. The recommendation, therefore, is to authorize the Library Director to approve the contract with the Quipu Group for \$27,575 and to direct the Library Director to proceed with realigning staff as described for an estimated cost of about \$26,000.

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**PROFESSIONAL SERVICES AGREEMENT FOR  
ILS Consulting Services**

THIS AGREEMENT is entered into on **April 2, 2013**, by and between the Santa Cruz Library/County Library, a Special District, hereinafter called "Library" and **Quipu Group LLC** hereinafter called "Consultant".

WHEREAS, Library desires certain services described in Appendix One and Consultant is capable of providing and desires to provide these services;

NOW, THEREFORE, Library and Consultant for the consideration and upon the terms and conditions specified agree as follows:

**SECTION 1  
Scope of Services**

The services to be performed under this Agreement are set forth in Appendix One.

**SECTION 2  
Duties of Consultant**

All work performed by Consultant, or under its direction, shall be sufficient to satisfy the Library's objectives for entering into this Agreement and shall be rendered in accordance with the generally accepted practices, and to the standards of, Consultant's profession.

Consultant shall not undertake any work beyond the scope of work set forth in Appendix One unless such additional work is approved in advance and in writing by Library. The cost of such additional work shall be reimbursed to Consultant by Library on the same basis as provided for in Section 4.

If, in the prosecution of the work, it is necessary to conduct field operations, security and safety of the job site will be the Consultant's responsibility excluding, nevertheless, the security and safety of any facility of Library within the job site which is not under the Consultant's control.

Consultant shall meet with **Teresa Landers**, Department Director, called "Director", or other Library personnel, or third parties as necessary, on all matters connected with carrying out of Consultant's services described in Appendix One. Such meetings shall be held at the request of any party. Review and Library approval of completed work shall be obtained monthly, or at such intervals as may be mutually agreed upon, during the course of this work.

**SECTION 3  
Duties of the Library**

Library shall make available to Consultant all data and information in the Library's possession which Library deems necessary to the preparation and execution of the work, and Library shall actively aid and assist Consultant in obtaining such information from other agencies and individuals as necessary.

The director may authorize a staff person to serve as his or her representative for conferring with Consultant relative to Consultant's services. The work in progress shall be reviewed from time to time by Library at the discretion of Library or upon the request of Consultant. If the work is satisfactory, it will be approved. If the work is not satisfactory, Library will inform Consultant of the changes or revisions necessary to secure approval.

**SECTION 4  
Fees and Payment**

For the services performed, the Library will pay the Consultant on a time-charge plus expense basis, monthly as charges accrue, the sum of consultant's salary expenses and non-salary expenses. Payment for the Consultant's services shall be made upon a schedule and within the limit, or limits shown, upon Appendix Two. Such payment shall be considered the full compensation for all personnel, materials, supplies, and equipment used by Consultant in carrying out the work.

Salary expenses include the actual direct pay of personnel assigned to the project (except for routine secretarial and accounting services) plus payroll taxes, insurance, sick leave, holidays, vacation, and other fringe benefits. The percentage of compensation attributable to salary expenses includes all of Consultant's indirect overhead costs and fees. For purposes of this Agreement, Consultant's salary expenses and non-salary expenses will be compensated at the rates set forth in the fee schedule attached to this appendix and in accordance with the terms set forth therein. Non-salary expenses include travel, meals and lodging while traveling, materials other than normal office supplies, reproduction and printing costs, equipment rental, computer services, service of subconsultants or subcontractors, and other identifiable job expenses. The use of Consultant's vehicles for travel shall be paid at the maximum rate of the current standard business mileage rate as established by the U.S. Internal Revenue Service.

Salary payment for personnel time will be made at the rates set forth in the attached fee schedule for all time charged to the project. Normal payroll rates are for 40 hours per week. Consultant shall not charge the Library for personnel overtime salary at rates higher than those set forth in the attached fee schedule without the Library's prior written authorization.

Budget estimates of the cost of each phase of the project are as follows:

Phase of Project	Work to be Completed	Cost
Project Launch	6 consulting hours	\$1,050
Needs Analysis	3 days onsite	\$6,000
Creation of Requirements	20 consulting hours	\$3,500
Development of Full RFP	10 consulting hours	\$1,750
RFP Released	8 consulting hours	\$1,400
Responses Evaluated	30 consulting hours	\$5,250
Vendor Demonstrations	3 days onsite	\$6,000
Final Decision	5 consulting hours	\$875
Negotiation	10 consulting hours	\$1,750
<b>TOTAL</b>		<b>\$27,575</b>

Variations from the costs for each phase which are justified by statements indicating personnel time expended are allowed after advance written Library approval is obtained, in the manner set forth in the Agreement; however, in no event shall the total fee charged for the scope of work set forth in Appendix One exceed the budget of \$27,575 without additional advance written Library authorization.

Payments shall be made monthly by the Library based on itemized invoices from the Consultant which list actual costs and expenses. Such payments shall be for the invoice amount, less a ten percent (10%) retention as described in Section 4 of the Agreement.

Invoices shall indicate the percentage completion of each work task as identified in the Scope of Work (Appendix One), the overall percentage of completion of the total required services and the hours worked by Consultant's staff.

Unless otherwise specified in the attached fee schedule, Consultant's fees shall be payable on monthly statements. The monthly statements shall detail the time worked by each class of employee and the expenses incurred for which billing is made. The monthly statements shall contain the following affidavit signed by a principal of the Consultant's firm:

*"I hereby certify as principal of the firm of (Insert Firm Name), that the charge of (Insert invoice amount) as summarized above and shown in detail on the attachments is a fair and reasonable use of public funds, is in accordance with the terms of Agreement dated (Insert Agreement Date), and has not been previously paid."*

#### SECTION 5 Changes in Work

Library may order major changes in scope or character of the work, either decreasing or increasing the scope of Consultant's services. No changes in the Scope of Work as described in Appendix One shall be made without the Library's written approval. Any change requiring compensation in excess of the sum specified in Appendix Two shall be approved in advance in writing by the Library.

#### SECTION 6 Time of beginning and Schedule for Completion

Consultant shall begin work upon its receipt of a written Notice to Proceed from Director. The Notice to Proceed shall not be issued until after this Agreement has been approved and authorized by the Library Council.

The schedule for completion of the work shall be as shown upon Appendix Three. In the event that major changes are ordered, the schedule for completion as stated in Appendix Three will be adjusted by Library so as to allow Consultant a reasonable period of time within which to complete any additional work which may be required as a result of the ordered changes.

In the event Consultant is delayed in performance of its services by circumstances beyond its control, the Library will grant Consultant a reasonable adjustment in the schedule for completion as described in Appendix Three provided that to do so would not frustrate the Library's objective for entering into this Agreement. All claims for adjustments in the schedule of completion must be submitted to Library by Consultant within thirty calendar days of the time of occurrence of circumstances necessitating the adjustment.

Consultant acknowledges that it is necessary for Consultant to complete its work on or before the completion date set forth in Appendix Three in order to allow the Library to achieve its objectives for entering into this Agreement. The parties therefore agree that time is of the essence in the performance of this Agreement.

#### SECTION 7 Termination

Library shall have the right to terminate this Agreement at any time upon giving ten days written notice to Consultant. Consultant may terminate this Agreement upon written notice to Library should the Library fail to fulfill its duties as set forth in this Agreement. In the event of termination, Library shall pay the Consultant for all services performed and accepted under this Agreement up to the date of termination.

#### SECTION 8 Insurance

*Only the successful supplier will be required to submit a certificate of insurance before commencement of work.*

1. Without limiting the foregoing in any way, supplier shall carry standard form Commercial General Liability Insurance and Professional Liability or Errors & Omissions acceptable to the Library in an amount not less than One Million Dollars per occurrence combined single limit Bodily Injury and Property Damage coverage and not less than Two Million Dollars aggregate.
2. For all insurance provided above, policies shall provide that the same cannot be canceled except upon thirty days' written notice to Library.
3. Except for Professional Liability, all insurance provided above shall name the Library of Santa Cruz, its officers, agents and employees as an additional insured, shown by endorsement, and shall include cross liability in favor of the Library, its officers, agents and employees.
4. A certificate of insurance shall be furnished to the Library as evidence of the above coverages and conditions prior to the commencement of work. Any statements that relieve the insurance company from liability if notice of cancellation is not sent are not acceptable.
5. Supplier agrees to provide Library at or before the effective date of this contract with a certificate of insurance of the coverage required. The certificate holder shall be the Library of Santa Cruz, Risk & Safety Management, 809 Center St Room 7, Santa Cruz, CA 95060.

#### SECTION 9

##### **Indemnification**

Consultant agrees to indemnify, defend, and hold harmless the Library, its officers, agents and employees, from and against any and all claims, demands, actions, damages, or judgments, including associated costs of investigation and defense arising in any manner from consultant's negligence, recklessness, or willful misconduct in the performance of this agreement.

#### SECTION 10

##### **Civils Rights Compliance/Equal Opportunity Assurance**

Every supplier of materials and services and all consultants doing business with the Library of Santa Cruz shall be in compliance with the applicable provisions of the Americans with Disabilities Act of 1990, and shall be an equal opportunity employer as defined by Title VII of the Civil Rights Act of 1964 and including the California Fair Employment and Housing Act of 1980. As such, consultant shall not discriminate against any person on the basis of race, religious creed, color, national origin, ancestry, disability, medical condition, marital status, age or sex with respect to hiring, application for employment, tenure or terms and conditions of employment. In addition, the Library of Santa Cruz, as defined in Resolution NS-20,137 and Ordinance 92-11, further prohibits discrimination on the basis of sexual orientation, height, weight and physical characteristics. Consultants agree to abide by all of the foregoing statutes, regulations, ordinances and resolutions.

#### SECTION 11

##### **Legal Action/Attorneys' Fees**

If any action at law or in equity is brought to enforce or interpret the provisions of this Agreement, the prevailing party shall be entitled to reasonable attorneys' fees in addition to any other relief to which he or she may be entitled. Either the Santa Cruz County Superior or Municipal Court shall have jurisdiction over any such action and that Court shall be authorized to determine which party is the prevailing party and what amount constitutes reasonable attorneys' fees to be awarded to the prevailing party.

#### SECTION 12

##### **Assignment**

This Agreement shall not be assigned without first obtaining the express written consent of the Director after approval of the Library Council.

#### SECTION 13



**Amendments**

This Agreement may not be amended in any respect except by way of a written instrument which expressly references and identifies this particular Agreement, which expressly states that its purpose is to amend this particular Agreement, and which is duly executed by the Library and Consultant. Consultant acknowledges that no such amendment shall be effective until approved and authorized by the Library Council, or an officer of the Library when the Library Council may from time to time empower an officer of the Library to approve and authorize such amendments. No representative of the Library is authorized to obligate the Library to pay the cost or value of services beyond the scope of services set forth in Appendix One. Such authority is retained solely by the Library Council. Unless expressly authorized by the Library Council, Consultant's compensation shall be limited to that set forth in Appendix Two.

**SECTION 14**

**Miscellaneous Provisions**

1. Project Manager. Director reserves the right to approve the project manager assigned by Consultant to said work. No change in assignment may occur without prior written approval of the Library.
2. Consultant Services Only. Consultant is employed to render professional services only and any payments made to Consultant are compensation solely for such professional services.
3. Licensure. Consultant warrants that he or she has complied with any and all applicable governmental licensing requirements.
4. Other Agreements. This Agreement supersedes any and all other agreements, either oral or in writing, between the parties with respect to the subject matter, and no other agreement, statement or promise related to the subject matter of this Agreement which is not contained in this Agreement shall be valid or binding.
5. Consultant's Records. Consultant shall maintain accurate accounting records and other written documentation pertaining to the costs incurred for this project. Such records and documentation shall be kept available at Consultant's office during the period of this Agreement, and after the term of this Agreement for a period of three years from the date of the final Library payment for Consultant's services.
6. Independent Contractor. In the performance of its work, it is expressly understood that Consultant, including Consultant's agents, servants, employees, and subcontractors, is an independent contractor solely responsible for its acts and omissions, and Consultant shall not be considered an employee of the Library for any purpose.
7. Conflicts of Interest. Consultant stipulates that corporately or individually, its firm, its employees and subcontractors have no financial interest in either the success or failure of any project which is, or may be, dependent on the results of the Consultant's work product prepared pursuant to this Agreement.
8. MacBride Principles/Peace Charter. The Library Council of the Library of Santa Cruz approved Resolution No. NS-19,378 on the 24th day of July 1990, endorsing the MacBride Principles and the Peace Charter and encourages all companies doing business in Northern Ireland to abide by the MacBride Principles and the Peace Charter.
9. Notices. All notices herein provided to be given, or which may be given by either party to the other, shall be deemed to have been fully given and fully received when made in writing and deposited in the United States mail, certified and postage prepaid, and addressed to the respective parties as follows:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Approved As To Form:

\_\_\_\_\_  
John G. Barisone  
Library Attorney

Date: \_\_\_\_\_

CONSULTANT  
Quipu Group LLC  
820 S. Monaco Pkwy., #453  
Denver, CO 80224

LIBRARY  
Library of Santa Cruz  
Library System  
117 Union Street  
Santa Cruz, CA 95060

By: \_\_\_\_\_

By: \_\_\_\_\_

Printed: \_\_\_\_\_

Teresa Landers

Title: \_\_\_\_\_

Library Director

Date: \_\_\_\_\_

Date: \_\_\_\_\_

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**APPENDIX ONE**  
**Scope of Services**

Selecting a new ILS can be a very difficult, time consuming and frustrating process. A complex set of needs and requirements must be examined to ensure that the appropriate system is selected. Quipu Group can help to guide Santa Cruz Public Libraries by examining the potential "fit" of each ILS option and how well each would fulfill the needs and resources available. No system is perfect for any library; however, Quipu Group prides itself on being able to help determine the best match for the technical needs and culture of each client to the appropriate ILS(s).

**1. PROJECT LAUNCH**

**ESTIMATED TIMELINE:        APRIL 1 – 12, 2013**

The project launch includes phone calls to discuss the project plan, timeline, milestones, responsibilities of the consultant and Santa Cruz Public Libraries staff, and communication methodologies. We will determine things such as the existence of one or more ILS Procurement-related groups, the main contacts for the different areas of the system and the project and finding agreement on the project timeline. These initial calls will determine the key people involved in the process and provide a basic introduction for the Consultant. Timelines and work requirements will also be discussed and agreed upon.

**2. NEEDS ANALYSIS**

**ESTIMATED TIMELINE:        APRIL 15 – MAY 15, 2013**

For this project, the Needs Analysis phase is related to the specific functionality of the ILS and the needs for each functional area of the library in relation to the ILS. The functional areas included in many RFPs for an ILS are acquisitions, cataloging, public interface, serials, IT/Systems, 3<sup>rd</sup> Party/API, and Implementation/Training/Support. The end result of this Needs Assessment will be a list of functional requirements for the Santa Cruz Public Libraries system, with all appropriate areas covered by the requirements. Melissa, in conjunction with another consultant, Lori Bowen Ayre, has recently worked with the Solano-Napa County Libraries (SNAP) to develop a full list of starter requirements which can be used during the Santa Cruz Public Libraries Needs Analysis phase. The starter requirements will be presented to the staff from different functional areas and changes or additions will be made according to the desires and requirements of Santa Cruz Public Libraries.

Melissa will be onsite for 3 days during this phase. Meetings with staff from the different functional areas will be planned as well as meetings with the main contact and other key staff during the onsite visit. Melissa will require a "note taker" for each of the meetings on the functional areas of the RFP and would ask the library to assign one or more staff members to help in this area.

**3. CREATION OF REQUIREMENTS**

**ESTIMATED TIMELINE:        MAY 15 – 31, 2013**

The input from the meetings held during the Needs Analysis will be used to create a full set of functional requirements for Santa Cruz Public Libraries which would form the majority of an RFP. A Functional Requirements document will be created by the Consultants, representing all appropriate areas for Santa Cruz Public Libraries. This information will need to be reviewed by appropriate Santa Cruz Public Libraries staff members before it could be finalized.

4. DEVELOPMENT OF FULL RFP

**ESTIMATED TIMELINE: JUNE 1 – 14, 2013**

The Functional Requirements will be used as the base of the full RFP. The Consultant will work with Santa Cruz Public Libraries staff to gather all necessary legal language for the RFP. Information about Santa Cruz Public Libraries which is needed to allow the vendor to configure and price a system would be included in the final RFP document.

5. RFP RELEASED

**ESTIMATED TIMELINE: JUNE 17 – JULY 19, 2013**

The RFP will be released and announced, making sure that all potential vendors are aware of the document. The RFP will include a question period for the vendors and the schedule should allow the vendors at least 4 weeks to respond. The Consultant will assist in responding to vendor questions during the RFP process.

6. RESPONSES EVALUATED

**ESTIMATED TIMELINE: JULY 22 – AUGUST 2, 2013**

Once all of the RFP responses are received, the evaluation period begins. The scoring methodology will be determined and the Consultant will provide documents for Santa Cruz Public Libraries staff to use as they are reviewing each proposal. The highest scoring vendors will be determined and those vendors will then be asked to provide an onsite demonstration for Santa Cruz Public Libraries. Questions or clarifications regarding the RFP responses will be gathered and sent to vendors prior to their onsite demonstrations.

7. VENDOR DEMOS

**ESTIMATED TIMELINE: AUGUST 5 – 16, 2013**

The vendors which were scored the highest during the RFP response review will be asked to provide onsite demos. Each vendor can be given a full day for their demonstration. Melissa will be onsite for the demonstrations and will provide an evaluation tool which could be used by staff participating in the demonstrations. Often the demonstrations are open to all interested staff and can be a good way to get more staff involvement in the ILS procurement process. The Consultant is estimating 3 days onsite for vendor demonstrations.

8. FINAL DECISION

**ESTIMATED TIMELINE: AUGUST 20, 2013**

The Santa Cruz Public Libraries staff will have the RFP scores as well as the evaluations from the vendor demonstrations to help in selecting the new ILS solution for Santa Cruz Public Libraries. The Consultant will provide this information to the group making the final decision to help them identify the main differences in the proposed products. A final recommendation will be created to reflect the thoughts of the group reviewing the vendor solutions.

9. NEGOTIATIONS

**ESTIMATED TIMELINE: AUGUST 20 – SEPTEMBER 30, 2013**

Once a decision is made as to the vendor of choice, the negotiation period will begin. The Consultant will work with the library and the selected vendor to complete a contract. The contract will include all of the system options and add-ons selected by the Library as well as

any development work required. The pricing and implementation plan are two other major parts of the final contract. Although the Consultant will be working to include all necessary legal notices, the contract will need to be reviewed by the Santa Cruz Public Libraries legal group before finalization.

## APPENDIX TWO

## Fee Schedule

**Consulting Services:** \$175 per hour

**Onsite visits:** \$1500 per day; one additional workday is charged to cover travel time, all expensive covered.

For the Scope of Work described in this proposal, the costs would be:

Phase of Project	Work to be Completed	Cost
Project Launch	6 consulting hours	\$1,050
Needs Analysis	3 days onsite	\$6,000
Creation of Requirements	20 consulting hours	\$3,500
Development of Full RFP	10 consulting hours	\$1,750
RFP Released	8 consulting hours	\$1,400
Responses Evaluated	30 consulting hours	\$5,250
Vendor Demonstrations	3 days onsite	\$6,000
Final Decision	5 consulting hours	\$875
Negotiation	10 consulting hours	\$1,750
<b>TOTAL</b>		<b>\$27,575</b>

APPENDIX THREE  
**Work Schedule**

See Appendix One.

## STAFF REPORT

DATE: March 27, 2013  
TO: Library Joint Powers Board  
FROM: SCPL Recognition Committee  
RE: Staff Recognition Monthly Report

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### SUMMARY

The Library has instituted a way to recognize staff formally and on an on-going basis. The committee will be recognizing these individuals monthly in a report to the LJPB.

#### **Mission**

Staff are our most valuable resource and as such, are deserving of ongoing recognition to feel connected and to keep morale high. The Staff Recognition Committee is charged with developing ways to accomplish this purpose.

### NOMINATIONS

#### **Ann Young**

Ann did an amazing job creating and updating the website related to the fallen officers. She spent her weekend checking for updates from me and handled them within minutes. One time I went to request an update and checked the site first. What I needed was already there (Nominated by T. Landers)!

#### **Sue Graziano**

When we needed data for the Facilities Master Plan "yesterday" she got it done that day. Fantastic job (Nominated by T. Landers)!

#### **Heather Norquist, Sheila O'Neil, Jim Tarjan, and Fred Ulrich**

On Wednesday 3/6, I had to leave unexpectedly right before my 3-5 desk shift was to begin. Given such short notice, it didn't look as if I could get a sub in time for my shift. Heather, Sheila, Fred, and Jim all offered to cover the desk for me so I could go. It turned out that a sub was en route, but my coworkers all covered for me so I could leave. I felt tremendously supported by my coworkers and am very grateful for them (Nominated by S. Harbison).

#### **Valerie Murphy and Brenda Mellroy**

Val and Brenda facilitated getting the fish in Downtown YP a lovely new home. The new aquarium is beautiful and the fish seem very comfortable (Nominated by S. Harbison).

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**Ken Madonia**

Ken did a wonderful job for us at LSB! We had asked for a new cabinet for the bathroom to hold our various supplies. He purchased the perfect one for us, put it together, installed it and even loaded it up with supplies! Thank you, Ken, for our new cabinet and for all the good work you do. And a big Bravo to the entire Maintenance Dept! I don't even want to think about where we'd be without all of you (Nominated by M. Barash).

**Kevin Hildreth**

Kevin worked with a regular patron who is extremely deaf for a long, long time, teaching him how to use the internet. Kevin was so patient with the man, who isn't always easy to deal with. The man was very appreciative. The rest of the staff were amazed at how patient Kevin was. He certainly went above and beyond the call of duty. (Which isn't really surprising, but should be recognized) (Nominated by L. Suhd).

**Sue Smith, Helga Smith and Gabe Reyes**

Thank you all for covering so seamlessly while Sheila was out on medical leave. You make things look so easy but I know how hard you all work. Thank you (Nominated by K. Henifin)!

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Teresa Landers <landerst@santacruzpl.org>

**Fwd: SCPL Patron Comment or Suggestion: Great employees**

**WEBMASTER SCPL** <webmaster@santacruzpl.org>  
To: Metis Group <metis@santacruzpl.org>

Fri, Mar 22, 2013 at 2:40 PM

Praise for Sharyn Schwab.

----- Forwarded message -----

From: <webmaster@santacruzpl.org>  
Date: Fri, Mar 22, 2013 at 12:22 PM  
Subject: SCPL Patron Comment or Suggestion: Great employees  
To: webmaster@santacruzpl.org

The following message has been received from:

NAME: Nickla Beemsterboer Witte

PHONE NUMBER: 415-662.1082

EMAIL ADDRESS: peac-within@live.com

=====  
I visit your library every six weeks and when I am here I do alot of work and research. I am hoperfully temporarily physically and emotionally challenged as a result of a violent crime. I so appreciate the sensitivities of your security and general staff to my needs and the needs of the other challenged folks who frequent the library. Upon this visit I recieved assistance from Sharyn Schwab. I am a published writer/researcher. Today she truly went the distance making my job much easier. This woman is remarkable! I am hoping that Gale Farthing will get word of this extraordinary staff person and acknowledge her for going above and beyond the call! Truly you have a great staff her. Sharyn helped bring my computer in from my car and helped me access a periodical that was checked out! Amazing! Thank you so much!  
=====

Got Questions? Text Us!  
Get answers on the go! Text SCPL to 66746 for instructions!



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**SCPL INCIDENT LOG**

Date M/D/YR	Branch	Time HH:MM	Brief Description	Steps Taken	Roving Guard Called	911 Called	CMT Called	Bld.Mtc. Called
03/06/13	B40	2:00 PM	Patron in verbal altercation with spouse	Patron told to leave	No	No	No	No
03/07/13	BC	4:00 PM	Patron reported mountain lion sighting	Called 911 - Transferred to Fish & Wildlife	No	Yes	No	No
03/09/13	APTOS	2:55pm	Patron reported seeing a hypodermic needle in the parking lot.	Needle placed in sharps container, bldg. mtc. Notified	No	No	No	Yes
03/12/13	DTN	2:30pm	Previously banned patron Walter Lilly created a disturbance.	Patron banned for the day.	Yes	No	No	No
03/12/13	DTN	5:15pm	Patron directing verbal outburst to Roving Guard-John Ottenberg.	Police spoke to patron who was given a warning	Yes	Yes	No	No
03/14/13	B40	2:30pm	Patron yelling about being saved by Jesus	Patron was asked to be quiet, he left	No	No	No	No
3/18/13	DTN	12:00pm	Razor blade fell out of a book that an employee was shelving.	Blade disposed of in Sharps container	No	No	No	No
3/20/13	DTN	2:00pm	Patron Mr. Zinger took a swing at another patron, Mr. Rosamund.	Patron Rosamund given warning	Yes	No	No	No
3/18/13	DTN	6:05pm	Male Patron used profanity toward female staff when asked to remove his bike	Patron asked to leave the library	Yes	No	No	No
3/21/13	DTN	5:00pm	Patron upset with her son being asked to move to another area in the library to make room for tutors who usually use the area.	Patron's mother demanded Staff's name.	No	No	No	No
3/22/13	DTN	11:00am	2 patrons (Marilyn Schroder & Alisha Robertson) found and turned in ID's thought to have been possibly stolen (Marilyn Schroder & Alisha Robertson)	Roving guard, Al Navidad called police	Yes	Yes	No	No
3/23/13	DTN	4:40pm	Hyperdermic needle found near Internet stations	Needle was disposed in Sharps container	yes	No	No	No
3/21/13	DTN	6pm	Unruly crowds of people inside and outside the library after free foodservice by the mission.	No specifics given	Yes	No	No	No
3/23/13	DTN	4:50pm	Hyperdermic needle found on floor	Disposed of in Sharps container	Yes	No	No	No
3/26/13	DTN	12:30pm	Intoxicated patron being disruptive	Patron asked to leave	Yes	No	No	No

000043



Teresa Landers &lt;landerst@santacruzpl.org&gt;

---

## Website Hits for February 2013 - Now including all 28 days of February!

---

1 message

**Ann Young** <younga@santacruzpl.org>

Tue, Mar 5, 2013 at 2:09 PM

To: Kira Henifin &lt;henifnk@santacruzpl.org&gt;, Teresa Landers &lt;landerst@santacruzpl.org&gt;

Here is a breakdown for February.

Total visits: 117,217 (SCPL website: 81,695; SCPL Catalog: 35,522)  
 Total pageviews: 462,791 (SCPL website: 155,719; SCPL Catalog: 307,072)

The top content sources for the above pageview statistics are:

- SCPL Catalog - 307,072 pageviews
- SCPL homepage - 65,422 pageviews
- Branch pages - 16,078 pageviews
- Local history articles - 15,558 pageviews
- Internet Resources (links to subscription databases) - 10,374 pageviews
- Community Information Databases - 9,313 pageviews
- Kids page - 7,613 pageviews
- Local history photo gallery - 4,913 pageviews
- Ematerials (links to ebook, eaudio vendors) - 3,589 pageviews
- Teens page - 3,270 pageviews
- Library services - 2,998 pageviews
- Evergreen FAQ/Tutorials - 2,492 pageviews
- Contact Us - 2,414 pageviews
- Reader's Link (Staff pick book reviews, etc.) - 1,952 pageviews
- Events calendar - 1,624 pageviews
- Site search - 1,232 pageviews
- Library Admin pages (LJPB agendas, audio files, etc.) - 1,213 pageviews
- What's New - 648 pageviews
- Business Brownbags - 534 pageviews
- SC County Endangered Species - 502 pageviews
- Did You Know? - 478 pageviews

The remainder are spread across a wide variety of pages.

Ann

000044

3/24/13

## Santa Cruz County Stories, Ella Thorp Ellis: Writer, artist, 'dune child'

By Ann Parker Santa Cruz Sentinel Santa Cruz Sentinel  
Posted:

SantaCruzSentinel.com

Ella Thorp Ellis remembers walking hand-in-hand, at the age of 5, with John Steinbeck. "John liked kids," she says. "He asked me what I wanted to be when I grew up. I said, 'A writer -- isn't everybody a writer?'"

In Ella's world, everyone was an artist of some sort. Her father, Dunham Thorp, was a scriptwriter and Joan Crawford's press agent. Marion, her mother, played the violin and wrote poetry.

Born in Hollywood, Ella spent most of her childhood in Moy Mell (Gaelic for "Land of Honey), a tiny bohemian community and writers' colony in the vast sand dunes near Oceano. Founder Gavin Arthur, a "Dunite" himself, was the grandson of America's 21st president, Chester Arthur.

The Thorps moved to Moy Mell in 1932, after Ella was crippled by polio as a toddler; they sought help from a gifted Oceano osteopath, Dr. Rudy Gerber. In her candid 2011 memoir, "Dune Child," Ellis describes slowly recovering under Gerber's care: learning to walk again, swimming in the ocean and exploring her beloved dunes as the colony's only child.

"It was a very loving community," recalls Ellis. "I was brought up by about 30 different adults, all of whom adored me."

Artists visited Moy Mell regularly, including some who would become legendary. Steinbeck was one of her favorites -- "He and I just took to each other" -- and she idolized Edward Weston, carrying his camera plates while he photographed the dunes. Hindu mystic Meher Baba impressed her as "the most beautiful man I'd ever seen."

But Ella disliked "bossy" Upton Sinclair, who ignored her when he came to visit Dunham, his press secretary.

"He adored my father and wanted his attention. So did I. We were total rivals," she declares. "My father was my life."

In 1938, Ella's parents divorced and she moved to Berkeley with Dunham. Six years later, at 16, she contracted tuberculosis and was confined to a hospital bed for three years.

"I hated being in the hospital, but they thought I'd die otherwise," she says. "I decided that I'd read all the books I ever wanted to read. 'The Grapes of Wrath' was one of them." That Steinbeck novel is the focus of this year's Santa Cruz Reads program, Feb. 27-March 27. Ella attended one of the discussion events and spoke up toward the end, says project co-founder Janis O'Driscoll, who was present.

"She said, 'I knew John -- he held my hand,' " O'Driscoll recalls. "She told stories about Steinbeck and all of us hung on her every word. It was such an amazing gift."

And Ella's childhood words to Steinbeck did come true: She became a writer and is now working on her 11th book.

Profile idea? If you have someone you would like to suggest as a profile subject, send it to [mdesjardins@santacruzsentinel.com](mailto:mdesjardins@santacruzsentinel.com).

GETTING TO KNOW

000045

## Therapy dog provides relief for UCSC students studying for midterms

By Terri Morgan Santa Cruz Sentinel Santa Cruz Sentinel

Posted:

SantaCruzSentinel.com

SANTA CRUZ -- A four-legged stress buster has been providing relief for hardworking UC Santa Cruz scholars.

Layna -- a certified canine good citizen and therapy dog -- was on campus to help stressed-out students improve their moods.

The 5-year-old black Labrador retriever spent two hours at the Science and Engineering Library on Friday surrounded by a giggling scrum of roughly 30 dog-deprived students. As many as eight hands petted her squirming body at the same time, while Layna wagged her tail and licked as many happy faces as she could.

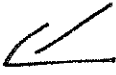
Research has shown that petting a dog helps people relax, as well as elevates their mood and sense of well-being. With final exams scheduled to begin Tuesday, a lot of students need a break from the tension. The friendly, petite dog provided the perfect antidote.

"This is awesome, I love it," said Katharine Magana, a junior who was taking a break from studying for her genetics final. "This is a nice de-stresser."

Layna's owner, Ann Hubble, has witnessed students' study stress all too often as a UC Santa Cruz librarian. She has seen firsthand how well students on campus react to encountering a friendly canine, where dogs are not normally permitted. Originally Layna was being trained as a guide dog for the blind. Hubble started taking the black lab to work with her when she was about 5 months old, and Layna attracted positive attention every where she went on campus.

"She got an early start on learning to socialize and behave around lots of people," Hubble said.

Layna was dropped from the guide dog program after she developed problems with her back legs. She wasn't ready to retire, however. So Hubble and her partner, Storey LaMontagne, began training Layna to serve as a therapy dog. After passing both her Canine Good Citizen and therapy certification tests, which were administered by a local dog trainer, Layna was ready to work.

Since 2011 Layna has participated once a month in the Santa Cruz Public Library's Tales to Tails program, visiting the downtown branch so children can read aloud to her. Recalling how positively university students reacted to Layna in the past, Hubble convinced university officials to let Layna come to the library and provide stress release as part of a pilot program. She hopes to be able to expand it and offer it again next quarter. 

"My interactions with students during the time I brought Layna to campus when she was a puppy-in-training indicated this was a good idea," Hubble said. "Students would seek me out at the reference desk so they could visit with Layna."

Layna and Hubble spent two hours Thursday evening at the school's McHenry Library, where Layna

was constantly surrounded by smiling students. Many wrote messages to Layna and her handler on a sheet of paper. The phrases "so cute" as well as "this is awesome," were repeated several times. The majority of the messages, however, urged Hubble to "bring her more often!"

Student Janice Hwang, who is majoring in molecular, cellular and developmental biology took a break from her studies Friday evening to see Layna. The dog lover also had gone to the McHenry Library for a dog fix the night before. That Layna break lasted longer than she had intended.

"It was so hard to say goodbye," Hwang said. "We need more dogs here."

Using dogs to help students relieve stress is gaining in popularity at other universities. Other campuses in the UC system have sponsored drop-in stress reduction programs involving therapy dogs. Therapy dogs also provide relief for students at Harvard University Medical School and Yale Law School, Hubble said.

"Both have regular therapy dogs available for 30-minute checkout to students," she said.

Layna will be back at the McHenry Library Saturday night, from 6-8 p.m., for students needing a doggie break.

Follow Sentinel correspondent Terri Morgan on Twitter at [Twitter.com/soquelterri](https://twitter.com/soquelterri).

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## INFORMATION REPORT

DATE: March 27, 2013  
TO: Library Joint Powers Board  
FROM: Teresa Landers, Director of Libraries  
Marcus Pimentel, Director of Finance, City of Santa Cruz  
RE: SCPL Audit and Financial Statements

The Basic Financial Statements and Independent Aud Auditor's report for the year ended June 30,2012 is available on the SCPL web site at:

<http://www.santacruzpl.org/aboutscpl/govern/>

A bound copy will be available at the LJPB meeting for those Board members interested in a copy. A copy will also be added to SCPL's local document collection.

The Library JPA received an "unqualified" or clean audit and there were no reportable findings. The Board had previously received, during the January 14, 2013 board meeting, a financial report on the year ended June 30, 2012. That report was released prior to the completion of the audit. The only difference between the January report and the final audited report was a year-end only revenue entry of \$5,915 for the Library's share of "hypothetical" investment gains (the proportion of the City's total investment pool that had a market value higher than the original investment purchase price). This is required by accounting standards although there wasn't an official sale of an investment. In practice, all gains and losses on sales of investments blend into the City's pooled investment fund and are shared proportionately with all the participating funds based on their cash balances. Note also that the January staff report focused only on the main JPA's operating fund. The audited financial report combines all activities except for the trust funds. You can see that more clearly on pg 35 of the audited report.

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# Santa Cruz Public Libraries Facilities Master Plan 2014-2023

Final Report 2013-03-28





**G R O U P 4**

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# EXECUTIVE SUMMARY

## 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.

## 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.



*“Connect, Inspire, Inform”*  
— Santa Cruz Public Libraries  
Statement of Purpose



# EXECUTIVE SUMMARY

## MAINTAIN



## GAIN



## ATTAIN



## 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

Built 1975  
8,000 SF  
Owner: Santa Cruz County

## Boulder Creek

Built 1984  
4,600 SF  
Owner: Santa Cruz County

## Branciforte

Built 1967  
7,500 SF  
Owner: City of Santa Cruz

## Capitola

Built 1999  
4,320 SF  
Owner: City of Capitola

## Downtown

Built 1968  
44,000 SF  
Owner: City of Santa Cruz

## Felton

Built 1893  
1,250 SF  
Owner: Belardi Trust

RECOMMENDATIONS

### 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

Renovated 2002  
2,343 SF  
Owner: City of Santa Cruz

## La Selva Beach

Built 1975  
2,200 SF  
Owner: LSB Recreation District

## Live Oak

Built 2006  
13,500 SF  
Owner: Santa Cruz County

## Scotts Valley

Built 2011  
13,150 SF  
Owner: City of Scotts Valley

## Headquarters

Built 2008  
13,800 SF  
Owner: City of Santa Cruz

RECOMMENDATIONS

### 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





## 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

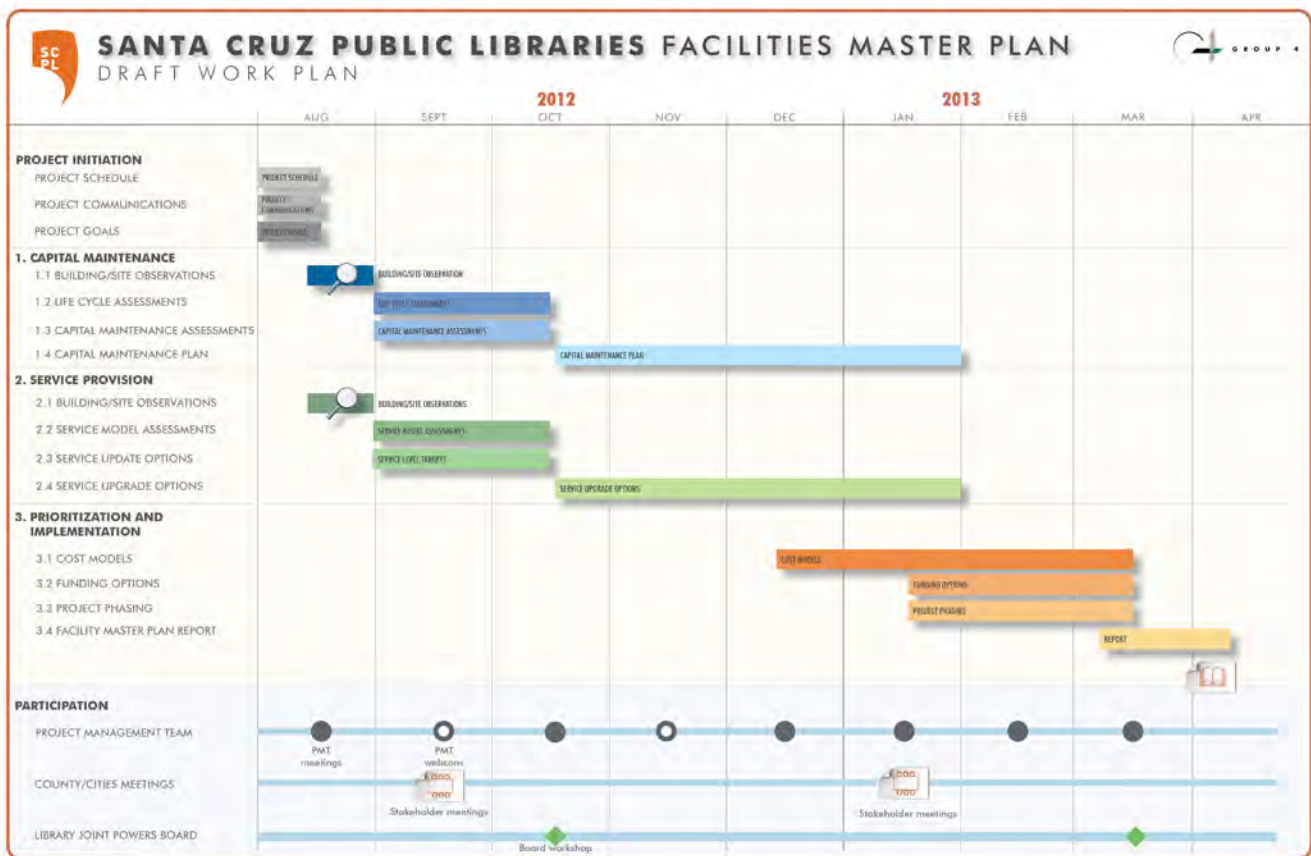
## PROJECT METHODOLOGY AND PARTICIPATION

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

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*"... 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)

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.

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.

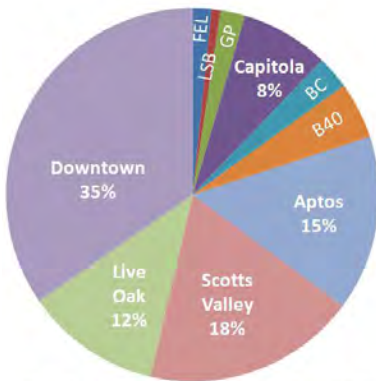
## STATE OF THE LIBRARY TODAY

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\*



\*Based on checkouts by branch, July-Sept. 2011

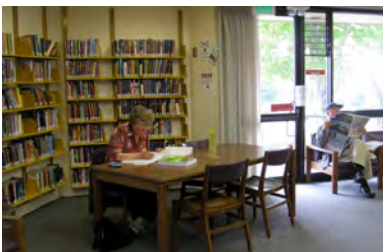
## PATTERNS OF LIBRARY USE

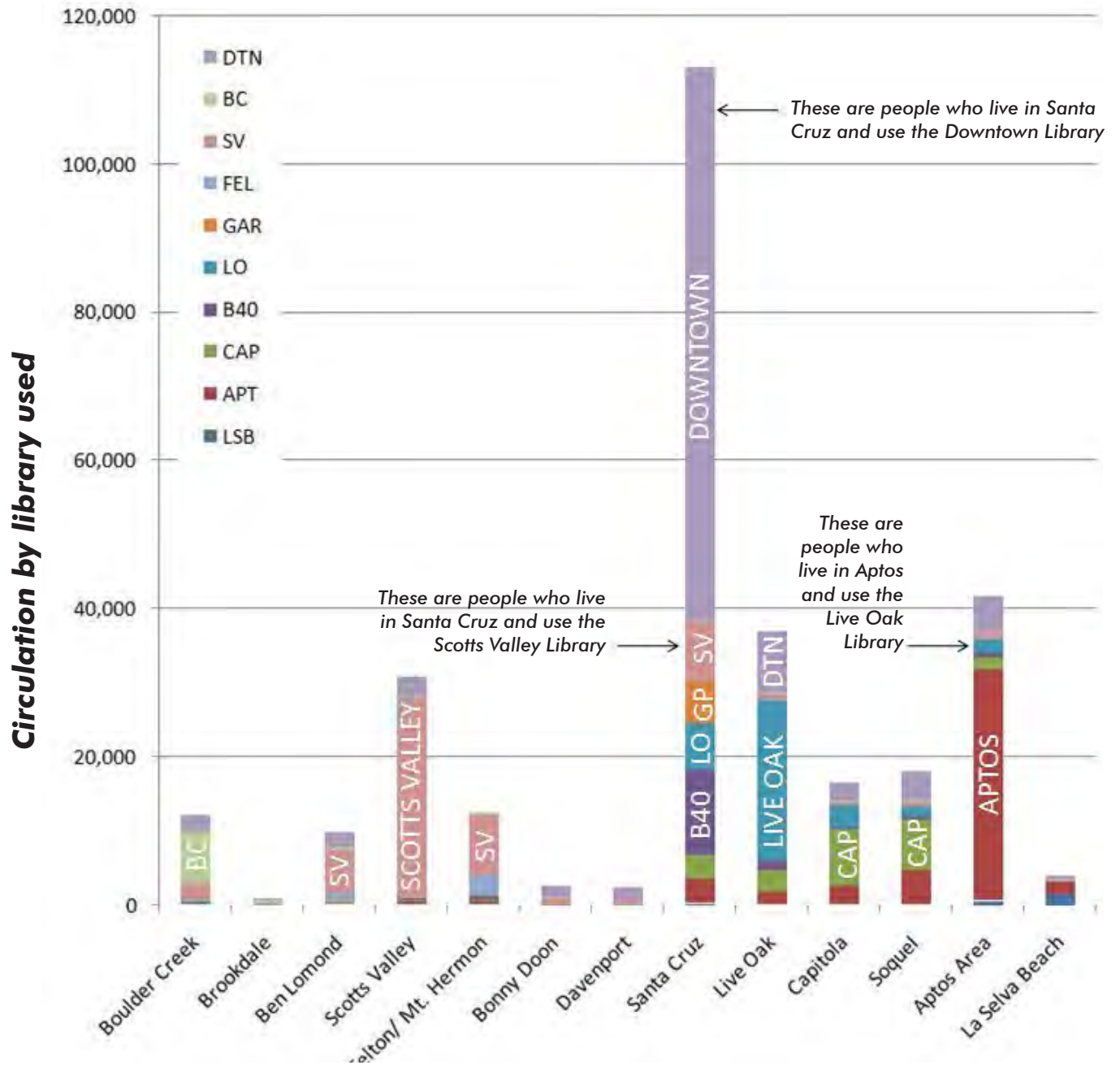
A key analysis in the development of the master plan was an examination of how Santa Cruz County residents currently use their libraries. Analysis of one year of circulation data between July 2011 and June 2012 revealed that in the SCPL system, 80% of all materials are checked out of four libraries – 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.

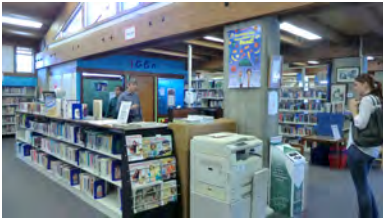
The highly mobile lifestyle that Santa Cruz County residents lead and their willingness to travel means that improvements in individual libraries will have systemwide benefits. Although there are opportunities to make improvements at each SCPL library, not every facility needs to be expanded; instead, 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.





# FACILITY ASSESSMENTS

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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.

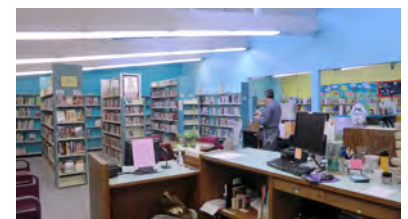
It should be noted that a full ADA accessibility survey was beyond the scope of this master plan study. Although some of the assessment findings are accessibility-oriented, the consultant team did not do an exhaustive study of accessibility conditions at any of the libraries. As such, this assessment 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.

- 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.

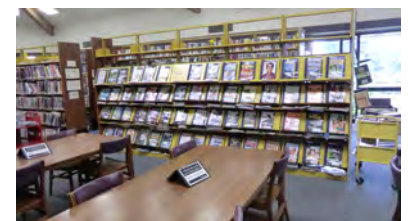
- The Aptos Library is SCPL's third highest circulating library, with Aptos customers accounting for 16% of all materials checked out systemwide. However, the Aptos Library only provides 8% of the library space overall in the SCPL system.
- The Downtown Library is appropriately sized overall, with a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



*Felton Library*



*Capitola Library*



*Aptos Library*

# RECOMMENDATIONS

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MAINTAIN	GAIN	ATTAIN
<p><b>Capital Maintenance</b></p> <ul style="list-style-type: none"> <li>Keep existing facilities open</li> <li>Deferred maintenance and life-cycle renewal projects</li> <li><b>Status quo – MAINTAIN projects do not address library services, operations, or capacity</b></li> </ul>	<p><b>Service Model Upgrades</b></p> <ul style="list-style-type: none"> <li>Improve service and operations in existing facilities</li> <li>New service model, increased self-service, improved customer and operational technologies</li> <li><b>GAIN projects do not expand capacity</b></li> </ul>	<p><b>Building Capacity</b></p> <ul style="list-style-type: none"> <li>Accommodate current and future needs</li> <li>Address space deficits</li> <li>Replace temporary and outdated facilities</li> <li><b>ATTAIN projects improve service and build capacity for the future</b></li> </ul>

## 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 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.

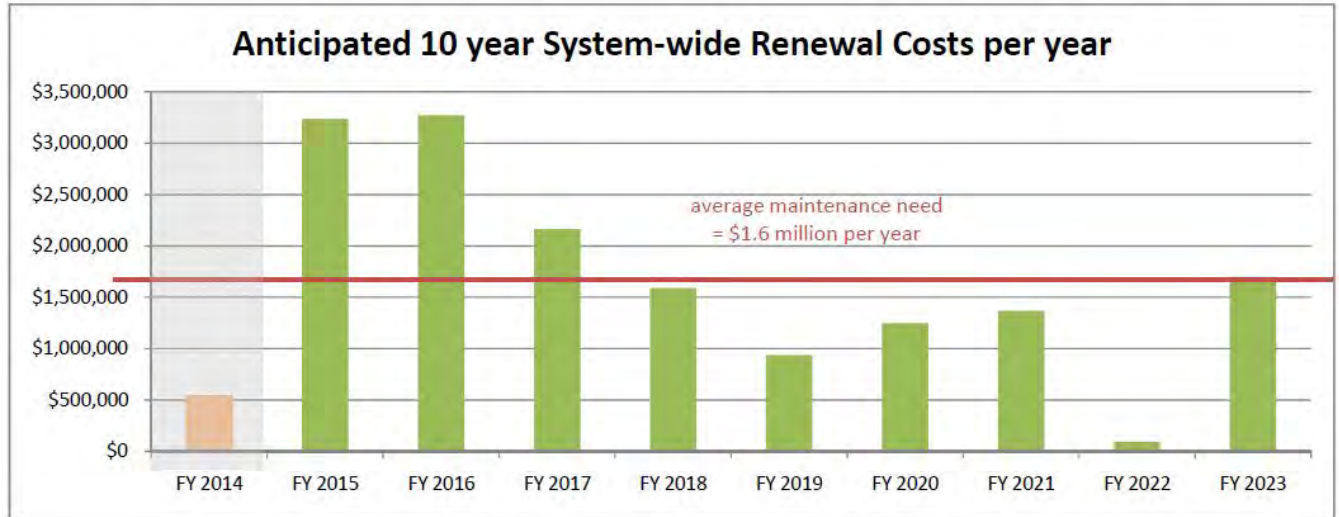
It should be noted that the approximate replacement dates for projects in the CMP are intended as a guide rather than as a mandate. On a year-to-year basis SCPL may elect to accelerate or defer some projects for reasons such as if building components are failing earlier than expected; if building components 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



## 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
<b>Total</b>		<b>\$ 16,153,000</b>

# MAINTAIN



*Boulder Creek Library*



*Branciforte Library*

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## 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	Facility Condition Index (FCI)	
				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:** 
$$\frac{\text{Renewal Costs (\$)}}{\text{Building Replacement Value (\$)}} = \text{FCI}$$

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

## **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.

		<b>MAINTAIN + GAIN</b>		
<b>Library</b>	<b>Owner</b>	<b>Low</b>	<b>to</b>	<b>High</b>
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
<b>Total</b>		<b>\$ 19,403,000</b>	<b>to</b>	<b>\$ 21,153,000</b>

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

\*\* Maintain plan recommendations only for Headquarters

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## **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 that can operated efficiently and effectively on its current staffing level. 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**

<b>Library</b>	<b>Owner</b>	<b>Low</b>	<b>to</b>	<b>High</b>
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
<b>Total</b>		<b>\$ 62,879,000</b>	<b>to</b>	<b>\$ 83,019,000</b>

# 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)*

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## 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

		<b>MAINTAIN</b>		<b>MAINTAIN + GAIN</b>	
<b>Library</b>		<b>Maintain Projects</b>		<b>Low to High</b>	
Owner					
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	
<b>Total</b>		<b>\$ 16,153,000</b>		<b>\$ 19,403,000 to \$ 21,153,000</b>	

		<b>MAINTAIN + GAIN + ATTAIN</b>	
<b>Library</b>		<b>Low to High</b>	
Owner			
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	
<b>Total</b>		<b>\$ 62,879,000 to \$ 83,019,000</b>	

# 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**

	EXAMPLE 1		
	Phase 1	Phase 2	Phase 3
Aptos		X	
Boulder Creek		X	
Branciforte	X		?
Capitola	pre-design	X	
Downtown	pre-design	X	
Felton	X		
Garfield Park			X
La Selva Beach			X
Live Oak	X		
Scotts Valley			X
HDQ	depends on DTN strategy		



*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**

	EXAMPLE 2		
	Phase 1	Phase 2	Phase 3
Aptos		X	
Boulder Creek	X		
Branciforte	X		?
Capitola	X		
Downtown	pre-design	X	
Felton	X		
Garfield Park	X		
La Selva Beach	X		
Live Oak	X		
Scotts Valley			X
HDQ	depends on DTN strategy		





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## 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

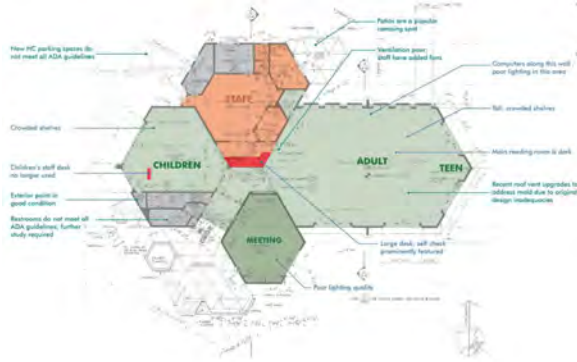
The meeting room at the Aptos Library is designed so that it can be used independently from the rest of the library. However, outside of use for programs, it is under-utilized, sitting dark and empty for much of the day. There is an opportunity to open up the wall between the meeting room and the main 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

**MAINTAIN**

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

**GAIN**

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

# APTOS

## ATTAIN

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 in a configuration that could be operated on existing staffing levels.

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.*

ATTAINAPTOS – 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.



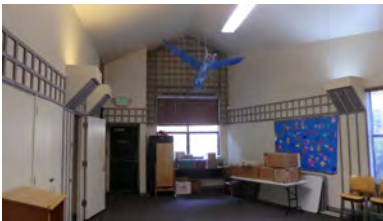
**ATTAIN**

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.

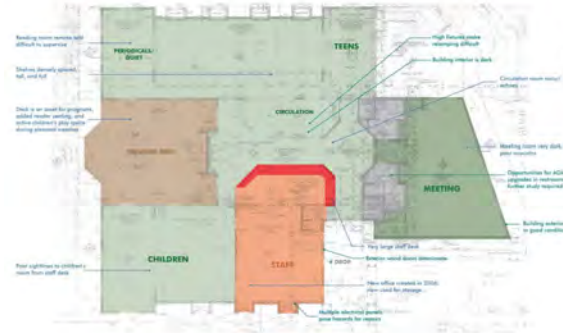
There may be sufficient space on the site to provide an opportunity for photovoltaics and/or other technologies that could enhance the library's energy efficiency and reduce its environmental footprint.

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

**Branciforte**

- Major projects by 2020 include:
  - Front door and door lock replacement
  - New interior finishes
  - Window repairs
  - Replace built-up roof

## MAINTAIN

Recommended budget for 2014-2023 Maintain projects at Branciforte Library is approximately **\$1,128,000** including escalation

## GAIN

**Branciforte**

- Upgrade service desk, holds retrieval, and self-check
- Upgrade customer access to power and data
- Options: reclaim staff area for group study; upgrade teen area; create marketplace
- Option: AMH

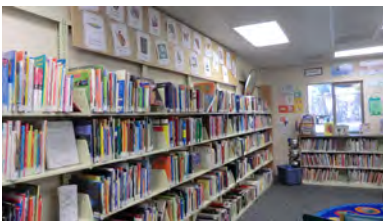
## GAIN

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 upgrading 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**

**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



- 1. Single Story: 12,000 – 15,000 SF
- Smaller = All uses on one-story
- Larger = Multipurpose room, tech classroom etc. 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



## 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



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.

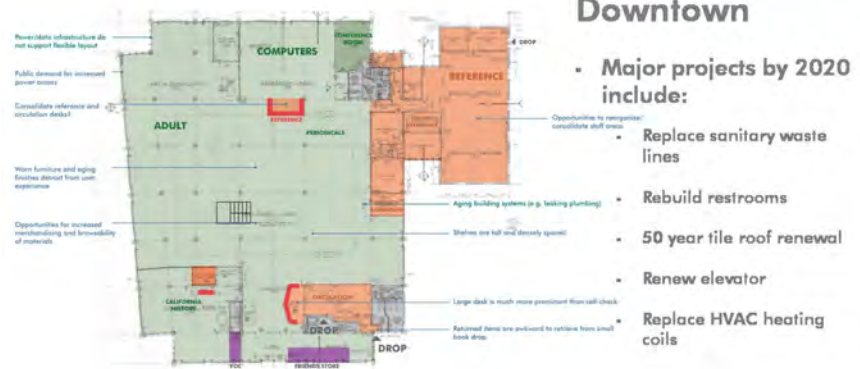
## MAINTAIN

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.

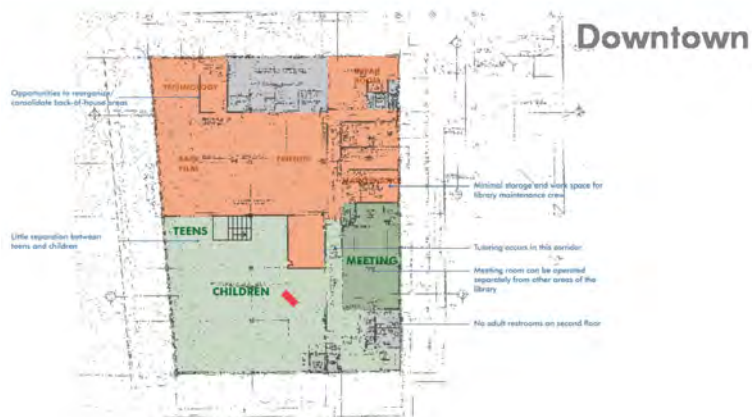
## MAINTAIN

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

## MAINTAIN DOWNTOWN – FIRST FLOOR



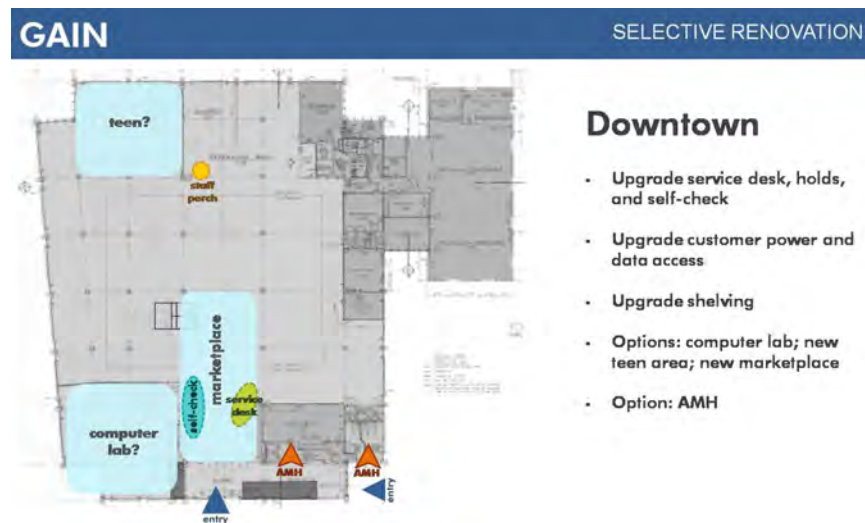
## MAINTAIN DOWNTOWN – SECOND FLOOR



## 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.



### 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 – REBUILD ON CURRENT SITE

#### Opportunities

- Strengthen civic connections
- Good solar orientation for daylighting and views
- Improved outdoor public spaces
- Multimode functionality
- Organized for efficient operations



## ATTAIN

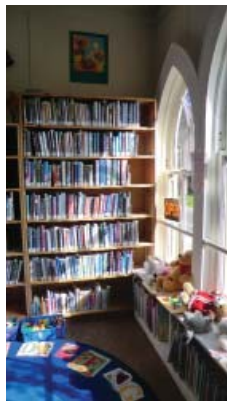
Recommended budget for structural remodel or replacement of the Downtown Library is **\$24.9 to \$35.6 million** (see page 29 for budgeting methodology)

*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 that can be operated efficiently and effectively on its current staffing level. 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

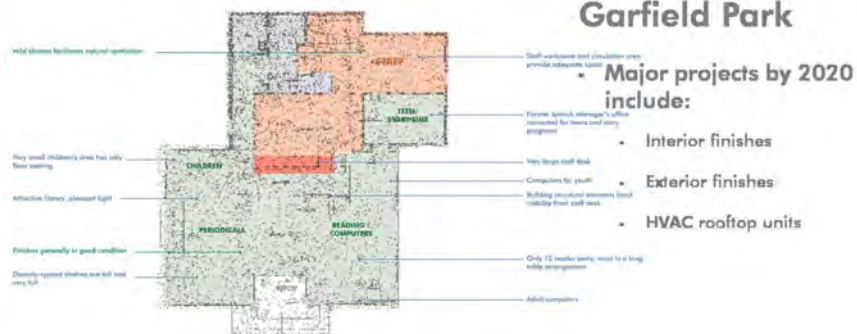
The Gain plan includes a budget for a less prominent service desk, improved self-service, and enhanced technology and data access at the Garfield Park Library. It is a relatively low-circulating library and is not a strong candidate for automated materials handling.

## ATTAIN

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

# GARFIELD PARK

## MAINTAIN



## MAINTAIN

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

## GAIN



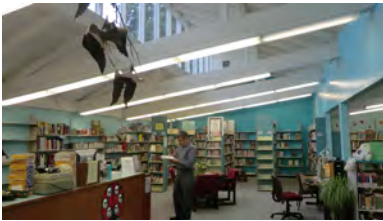
## GAIN

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

## MAINTAIN

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

## 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

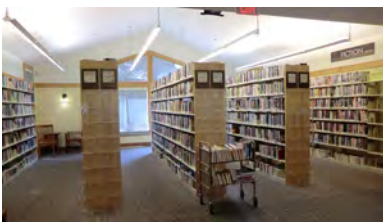
## GAIN

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**

**Live Oak**



- Major projects by 2020 include:
  - Repaint exterior
  - Replace interior finishes

**MAINTAIN**

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

**GAIN**

**Live Oak**



- Upgrade service desk, holds retrieval, and self-check
- Upgrade customer access to power and data
- Replace children's & reference desks with new marketplace
- Option: consolidate collections to create flexible meeting space
- Option: AMH?

**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**



**MAINTAIN**

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

**GAIN**



**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

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## ACKNOWLEDGMENTS

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\* *Term ended 2012*

\*\* *Term began in 2013*

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Laura Whaley  
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