

# IMPLEMENTATION

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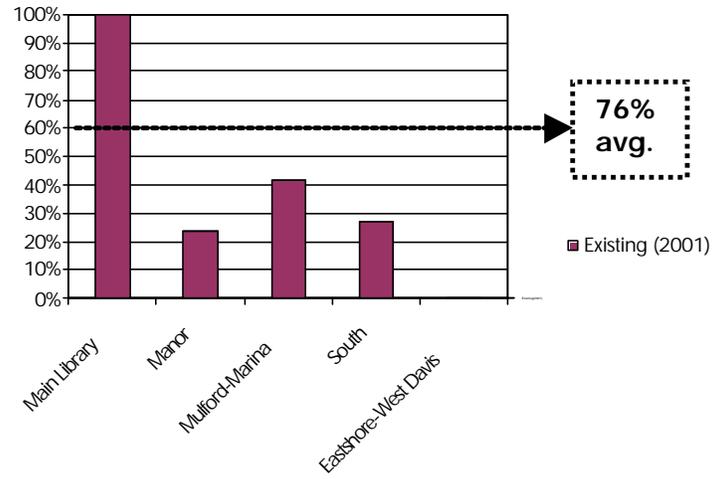
	Project Timeline	Project Description
<b>Current (2000)</b>	Manor Branch.....2,100 sf Mulford–Marina Branch.....2,000 sf South Branch.....1,100 sf <b>Current Branch Total.....5,200 sf</b> + Main Library.....50,000 sf <b>Current Citywide Total.....55,200 sf</b>	The <i>three existing branch libraries</i> in the San Leandro Library system, along with the newly renovated Main Library, provide 76% of the total citywide need for branch library space by the year 2020. The need is based on the relationship between the City’s projected 2020 population and the total area (measured in square feet) of all the existing library branches and the Main Library.
<b>Phase 1</b>	Upgrade Manor Branch.....9,313 sf <b>Total sf added..... 7,213 sf</b> <b>City total sf at end of Phase 1.....62,413 sf</b>	The first project recommended by the <i>Branch Libraries Study</i> is the Manor Branch, due to the supporting role it will play for all of the branches as well as the larger need in this area. Upgrading the Manor Branch will significantly improve library services and facilities in San Leandro. Those neighborhood service areas not affected will receive improvements as a later stage. Total library space citywide will have increased to meet 85% of square footage needed by the year 2020.
<b>Phase 2 and Future Library System</b>	Upgrade Mulford-Marina Branch..4,855 sf Upgrade South Branch.....4,092 sf New Eastshore/W. Davis Branch...4,092 sf <b>Total sf added .....13,039 sf</b> <b>City total sf..... 72,350 sf</b>	The completion of implementation of this <i>Branch Libraries Study</i> will include upgrades to both the existing Mulford-Marina and South Branches and the construction of a new branch in the Eastshore-West Davis area. Total library space citywide will now be 100% of the square footage needed by the year 2020 and all improvement goals will have been met.

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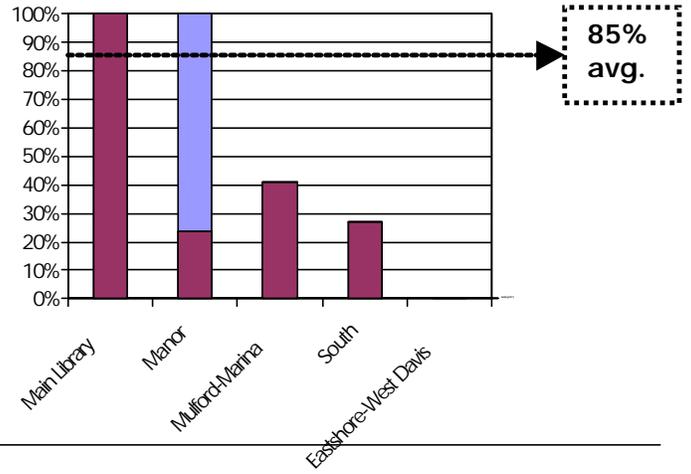
## Phasing Plan

## Phased Improvements (as a % of 2011 library sf needs)

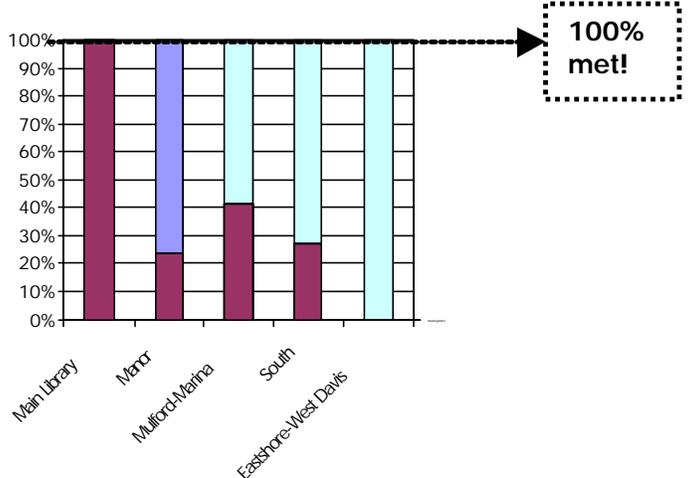
Current (2001)



Phase 1

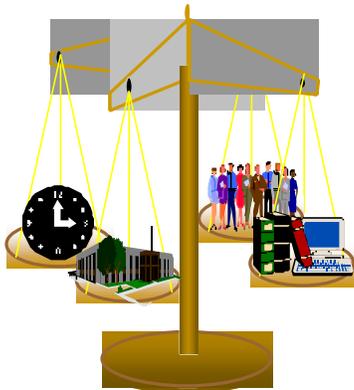


Phase 2 and Future Library System



# IMPLEMENTATION

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*Analysis of the costs of the recommended projects must address both one-time capital funds necessary to construct or improve branch facilities and on-going funds to maintain and operate them.*

## FINANCIAL ANALYSIS

An integral part of the *Branch Libraries Study* process was the development of project costs. It was mandated from the onset of this study that the recommendations would be developed with a comprehensive project budget including construction, operating and maintenance costs, as well as financing options. The project costs can be broken down into two categories: **capital project budget** and **operating and maintenance budget** (which includes both personnel costs and service costs such as new collection materials and technology, utilities, custodial care, supplies, and postage).

Both of these elements are essential to the success of the project. A premier library system requires excellent materials, talented professional staff, convenient hours of operation, and facilities that support the Library's mission. A financial analysis of the *Branch Libraries Study* is therefore necessary to find the correct balance between these competing financial needs. A thorough analysis of the costs of the *Study* recommendations must address both the one-time capital funds necessary to construct or improve library buildings and the on-going funds to maintain and operate them.

## CAPITAL PROJECT BUDGET

The purpose of this budget is two-fold: 1) to identify realistic project costs that can be used in the planning stage of a project, at which point most public project budgets are established, and 2) to serve as a tool that can be customized to any of the *Branch Libraries Study* projects once the opportunity to move ahead with a project occurs. Components of the capital project budget include both hard and soft costs. Hard costs include land acquisition, demolition, renovation, new construction, site improvements, furniture, fixtures and equipment, and technology. Soft costs include design and engineering, project management, plan check, inspection and moving costs. Contingencies and escalation have been applied to both hard and soft costs.

Some costs have been excluded from the capital project budgets because they could not be clearly defined at this point in the facilities planning process, such as utility fees. These fees are nonetheless very real costs associated with development and will therefore need to be defined and incorporated into the capital budgets as the projects become better defined. The City is exempted from other costs such as special development fees. Land costs have also been excluded from the capital project budgets for Manor Branch and Mulford-Marina Branch because both projects are on city-owned sites. Estimated land costs for South Branch and Eastshore-West Davis have been included in these projects budgets. However, because of the significant costs of developable land, the City will be actively working to identify potential library sites owned by a school district or other community partner that could reasonably be made available to the City. All of the development strategies currently being considered are on such sites.

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### Capital Cost Model Methodology

The approach to developing the hard costs had several built-in checkpoints. The cost models were developed by the *Branch Libraries Study* consultants and an estimating specialist who has experience with both construction and renovation of similarly sized branch libraries. Proposed projects were classified into two budget categories: **small branch library** (less than 8,000 sf) and **medium branch library** (greater than 8,000 sf).

Budgets are comprehensive. Construction budgets are based on per square foot costs for building, landscape, and parking appropriate to public buildings of the size and type proposed and are based on traditional (design/bid/build) project delivery by a public sector entity. Furniture budgets are also based on square foot costs and are for new items to replace and augment the existing furniture. Soft costs utilize a budget of 30% of the hard costs, which includes design and engineering fees, construction management costs, and a 5% contingency. The implementation plan proposes a 10-year schedule. Hard and soft costs will rise over the course of building the projects and escalation is included in the budget.

### CAPITAL BUDGET

The following chart provides a breakdown of the major capital costs of the *Branch Libraries Study* projects. The costs shown are in 2001 dollars. Costs are not escalated in this chart, and should be for planning purposes.

<b>Cost Analysis Summary</b>			
<b>Service Area</b>	<b>Strategy</b>	<b>Building Size (sf)</b>	<b>Project Budget (2001 dollars)</b>
Manor Branch	Upgrade	9,313 sf	\$ 4,953,000
South Branch	Upgrade	4,092 sf	\$ 2,415,000
Mulford-Marina Branch	Upgrade	4,855 sf	\$ 3,198,000
(Eastshore-West Davis Branch )	New	4,092 sf	\$ 2,996,000
<b>City Total</b>	<b>4 projects</b>	<b>17,152 sf</b>	<b>\$ 13,562,000</b>

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*Implementation of the full recommendations described in this Branch Libraries Study has a current capital cost of approximately \$13.5 million dollars.*

## **CAPITAL BUDGET FUNDING STRATEGIES**

Implementation of the full recommendations described in this *Branch Libraries Study* has a current capital cost of approximately \$13.5 million dollars. There are many different approaches to fund the capital cost of the four *Branch Libraries Study* projects. Some funding for the Manor Branch project has already been identified in the City's 5-year Capital Improvement Program (CIP) budget. The major challenge remaining is to determine how to fund the remaining three projects recommended in this *Branch Libraries Study*.

There are several debt financing alternatives available to the City, including development impact fees, general obligation bonds, certificates of participation, benefit assessment districts, parcel taxes, Mello-Roos special tax bonds, and Proposition 14. The following is a brief synopsis of each of these financing alternatives.

### 1. Development Impact Fees

When a jurisdiction looks at existing revenues and they are not adequate to support the development of a capital improvement program on a pay-as-you-go basis or cash basis, an alternative available to the jurisdiction is to implement new fees. One vehicle that has been used by several jurisdictions for the construction of new library facilities is a development impact fee. The fee is typically charged against new residential housing projects. It is based on the number of housing units to be developed the timing of the build-out of those housing units, and the total amount of money needed.

### 2. General Obligation Bonds

Since the passage of Proposition 46 in 1986, cities have been able to issue general obligation bonds to acquire, construct, or improve real property. General obligation bonds are the most efficient form of long-term debt financing because they require neither a reserve fund nor funded interest (i.e., capitalized interest) during construction or acquisition of the project. Therefore, general obligation bonds are smaller in size and annual total debt is correspondingly lower than any other form of long term debt financing. The major challenge of a general obligation bond is the required two-thirds majority voter approval and the inequities created by Proposition 13 in the assessed valuations among property owners/homeowners. Another is the time necessary to educate voters about the need for the financing program, holding an election, paying for the election, and selling the bonds. A final consideration is that a city election for the issuance of general obligation bonds must receive city council approval and can only occur three times a year as stipulated by state regulations.

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### 3. Certificates of Participation

Certificates of participation are a subset of the general financing technique known as lease/purchase or installment sale obligation financing. Within the tax-exempt realm a lease/purchase allows a municipality, in consideration for the use of equipment and/or real property, to make lease payments over a specified period of time. At the conclusion of this contract, the lessee (municipality) has the right to purchase the leased capital items at a nominal amount (usually \$1) or ownership may have already transferred by reason of an installment sale contract. If the financing is structured to meet the requirements established by the federal government, the lease payments to the lessor are exempt from federal and state income taxation. The lessor, therefore, requires a lower rate of return from the financial contract (lease), thus lowering the interest costs to the lessee. The city or district, through this financial instrument, has accessed the tax-exempt debt market. The major advantage of a certificate of participation financing mechanism is that it does not require voter approval. In California, the local legislative body (i.e., city council or library district board) is empowered to enter into lease/purchase financing.

### 4. Benefit Assessment and Parcel Tax

Proposition 218, passed in 1996, now prohibits the creation of Benefit Assessment Districts. Parcel taxes require super majority (67%) voter approval. Both parcel taxes and benefit assessments have been used throughout California to finance emergency and paramedic services and improvements. The advantage of these types is that the actual amount levied per household, business, etc. can be structured so that it is reflective of the benefit derived from the improvement or service (i.e., the assessment is based on the proportion of the benefit received by each member of the District). This is in contrast to the general obligation bond tax, which can only be based on assessed valuation. In the case of a parcel tax, the amount can be based on anything *except* assessed valuation.

### 5. Mello-Roos Special Tax Bonds

The Mello-Roos Community Facilities Act was enacted by the California Legislature in 1982 to provide all cities, counties or districts an alternative method of financing essential public facilities and services. The Act allows cities to create separate public agencies, known as community facilities districts, within their boundaries for the purpose of financing certain public facilities and services. The Mello-Roos financing mechanism uses a special tax to repay the annual debt service and operating costs. The special tax may be based upon benefit to the parcels of land in the district, or on the cost of making the facilities or services available, or on any other reasonable basis. The tax must not be ad valorem or related to the value of the property.

# IMPLEMENTATION

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*Proposition 14 monies can potentially fund 65% of the funds needed for construction, renovation, and/or expansion of library facilities. Grant recipients must provide the matching funds for at least 35% of project costs.*

## 6. Proposition 14 – State Library Bond

This statewide library bond measure was approved by voters on March 7, 2000. It will provide \$350,000,000 for financing a library construction and renovation program to be administered by the State Librarian. First priority will be given to joint-use projects in which the agency that operates the library and one or more school districts have a cooperative agreement. Second priority will be given to all other public library projects.

All grants will be made on a competitive basis instead of a per capita allocation. Grant recipients must provide matching funds for least 35% of the costs of the project. This bond potentially could provide 65% of funds for construction, renovation and/or expansion of branch library facilities, as presented in this *Branch Libraries Study*. Recipients may use the funds for the following purposes:

- *Acquisition or construction of new facilities or additions to existing public library facilities.*
- *Acquisition of land necessary for the purposes listed above.*
- *Remodeling or rehabilitation of existing public library facilities or of other facilities for the purpose of their conversion to public library facilities.*
- *Furniture, fixtures, and equipment to make a facility fully operational if the project is funded through this bond.*

## 7. Other Funding Strategies

Other funding strategies for the capital costs of the projects recommended in this *Branch Libraries Study* might include projects led by private developers, redevelopment agency projects, and any other appropriate financing mechanisms that will facilitate project implementation.

### **FUNDING CAPITAL IMPROVEMENT COSTS**

The following are financing options for consideration by the City for funding the increased operating and maintenance costs associated with this *Branch Libraries Study*:

#### 1. Emergent Funding Opportunities

Taking advantage of emerging opportunities is a critical factor in securing project funding. For example, because of its support roll for surrounding school and joint-use opportunities with both San Leandro and San Lorenzo School Districts, the Manor Branch project is submitting an application for Proposition 14/State Library Bond money. Matching funds are being identified through the Capital Improvement Program (CIP), and adjacent

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land has already been acquired for the expansion. Funding opportunities that strategically leverage the City's funds should be pursued as they arise.

## 2. Capturing Operational Efficiencies in Joint-Use Facilities

One of the recommended development strategies for South Branch is to build a joint-use library for use by a school as well as for the surrounding community. Joint-use facilities or co-location has the potential to share the burden of both capital and operational costs.

## 3. Public/Private Partnerships and Redevelopment Funds

Not all of the projects have concrete funding opportunities identified as of yet. However, the site identified for both the Eastshore-West Davis and the Mulford-Marina projects are in good locations for the City to consider partnerships with private developers and potentially redevelopment monies.

# COMMUNITY PARTICIPATION



Extensive community participation shaped the recommendations.

*"There's not enough seating for children or adults."*

–Manor Branch Patron

*"It would be nice to have a corner for parents to read to children..."*

–Mulford-Marina Branch Patron

*"South Branch is too small!"*

–South Branch Patron



Customers identified the strengths and weaknesses of existing branch libraries in the patron surveys.

## Extensive Community Participation

San Leandro residents played an important role in shaping the recommendations contained in this *Branch Libraries Study*. During the course of the six-month long, community-based planning process, the Library sought input and guidance from nearly two hundred library customers, library staff, and residents and community leaders from neighborhoods throughout San Leandro. This extensive public outreach effort consisted of patron surveys and face-to-face interviews, mapping analysis of customer use patterns, focus groups, public workshops, and interviews with library staff. Public meetings were also held to present and discuss the draft *Branch Library Study* and the conceptual design for prototypical elements and the Manor Branch Library, the first library of the *Study* to be implemented. In addition, presentations of the findings and recommendations of this *Study* have been made or are planned with city council members, school board trustees, and library staff.

### A. Patron Surveys and Interviews

In order to capture a “snapshot” of how library customers use their local branch libraries and how satisfied they are with the library services offered there, the Library and consultant team randomly distributed patron surveys at each of the three branch libraries as well as at the Main Library. A total of 116 of these surveys were completed and returned, with 80% (93) of the completed surveys coming from branch library customers. In addition to completing the written survey, 49 library patrons provided additional input and feedback during face-to-face interviews.

Survey and interview questions asked patrons if their branch libraries were conveniently located and accessible, if they used other libraries in addition to their local branch, and their general level of satisfaction with existing library services and facilities. The major findings of this patron survey are summarized below and discussed in greater detail in the *Appendix* of this document:

- **Patrons were generally satisfied with the location of the existing neighborhood branches, with a significant number stating that they could conveniently walk or bike to their local branch library.**
- **The majority of patrons either used their local branch exclusively OR used their local branch primarily and occasionally used the Main Library to supplement services not available at their branch, reinforcing the finding that many patrons prefer to access library services at a local branch if possible.**
- **Three-quarters of patrons expressed a desire for existing library services at their branch to be expanded (including a bigger, more diverse collection, additional computers and technology, more seats, and longer hours). There was also strong support for adding new services at the branch libraries, especially services that would**

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*enhance the educational activities of local schools, such as homework centers, arts classes, and tutoring programs.*

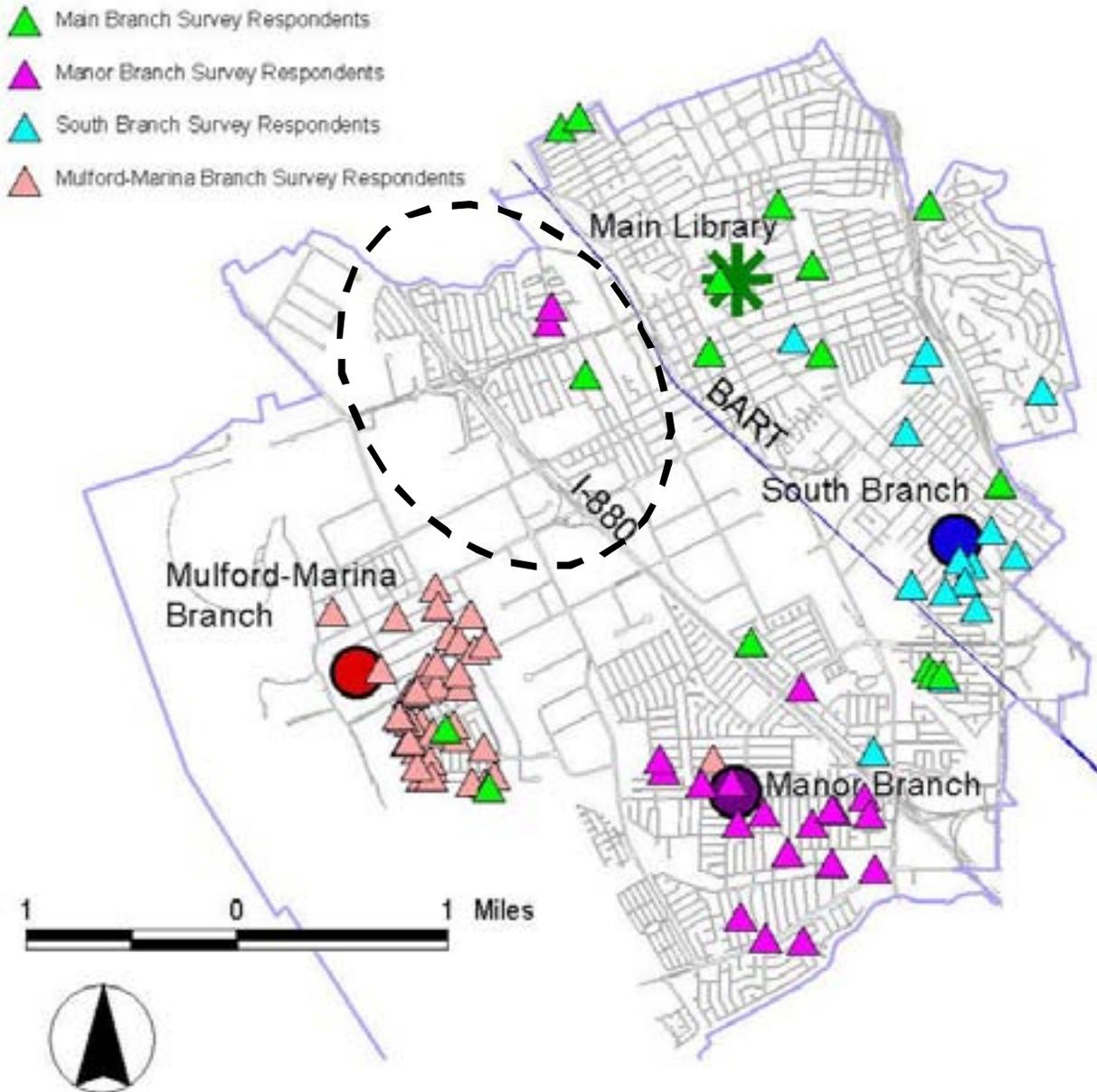
## B. Mapping Customer Use Patterns

In order to learn more about how San Leandro residents use their branch libraries, the consultant team used Geographic Information System (GIS) software to map 100 customer addresses (using the generic block number and street name given on the patron survey). These customers' addresses were symbolized with different colored triangles to indicate which library branch each customer typically used.

Comparing these customers' addresses with the location of the branch libraries each customer primarily used suggested two general conclusions. First, the customers in the sample were predisposed to use the local branch library in their neighborhood area, corroborating findings from the patron surveys that customers prefer to access library services locally whenever possible. The Main Library, however, served patrons from both the surrounding neighborhood areas and the city as a whole revealing that this facility functions as both a neighborhood branch library and a citywide resource providing services in conjunction with the branch libraries. It was noted, however, that patrons west of I-880 from the Manor Branch Library service area used the Main Library less than other Branch Patrons, possibly because of geography or comparative convenience of the Manor Branch location. Secondly, very few of the patrons in this sample were from the Eastshore-West Davis area, suggesting that the nearest library is difficult to access for residents of this area or is otherwise unable to meet residents' needs. ***Whatever the cause, it appears that the Eastshore-West Davis area is dramatically underserved in terms of convenient, accessible library services.***

*Very few of the patrons in the mapping analysis were from the Eastshore-West Davis area, suggesting that the area is dramatically underserved in terms of convenient, accessible library services.*

## PATRON MAPPING STUDY:



Map of library use patterns showing the neighborhood-focus of existing branches and the dramatic service deficit in the Eastshore-West Davis area (circled).

## C. Focus Groups and Public Workshop

The purpose of the focus groups and public meeting was to gain a more in-depth understanding of the needs of library customers. Nearly 30 people, including high school youth, seniors, and community leaders from civic, business, and school organizations, participated in the 3 focus groups convened to discuss library services in San Leandro. In addition, over two dozen San Leandro residents and neighborhood leaders attended an evening workshop that was open to the public. Although the participants of the focus groups and public workshop identified multiple priorities for improving branch library services and facilities, several common themes emerged from these sessions:

- **Expand the use of technology in the branch libraries.**
  - Increase the availability of computers, technology resources, and technology training for the public.
  - Explore the role of the branch libraries as a ‘community technology centers’ in the neighborhoods.
  - Utilize technology to help make the library more operationally efficient and customer responsive.
- **Enlarge and diversify the collection at the branch libraries.**
  - Tailor collections at each branch to meet the unique needs of surrounding service areas (i.e., large print, bilingual).
  - Provide multiple copies of popular items that are checked out frequently or all at once (i.e., new bestsellers or books commonly used for school projects).
  - Build a more contemporary collection covering a broader array of topics.
- **Provide more space for services & programs at the branch libraries.**
  - Provide comfortable, quiet spaces for individual library uses such as reading and research.
  - Provide dedicated spaces for group uses such as storytelling, study groups, literacy training, and families with children.
  - Consider providing spaces such as activity rooms, outdoor areas, and multipurpose rooms for innovative library programs and community events (book readings, film screenings, neighborhood carnivals, etc).
- **Retain neighborhood focus of branch libraries.**
  - Customers like the personalized, knowledgeable service they receive at their neighborhood branch.
  - Neighborhood branches are convenient for surrounding residents to get to (easy to walk and bike to).
  - Local branches meet customers ‘daily needs’ for library services (check e-mail, pick up a reserved book, grab a video for the kids to watch after dinner, etc.).



*Community members wanted more technology, broader collections, and more space, while retaining the same neighborhood feel at their local branch.*

*“When I need to do homework with classmates we [have to] use our houses because there’s not enough room at the library.”*

*–Manor Branch Patron*

# COMMUNITY PARTICIPATION

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*"Mulford Branch is very small. Because it's so small, many people [have to] travel to the Main Library."*

–Mulford-Marina Branch Patron

*"I would like to see storytime [offered year round] at all branches. Right now, it is only available during the summer [at my branch]."*

–Manor Branch Patron

## D. Additional Surveys from Focus Group & Workshop Participants

In addition to expressing their opinions in the full group discussions, 32 of the participants at the focus groups and public workshop completed surveys designed to measure their satisfaction with their local library's collection (including the children's, adult, and multimedia collections), the programs offered at the library, the library's location, and the library building itself. The results of these survey are summarized below and further detailed in the *Appendix* section document:

- *While the general collection at the Main Library received a 100% satisfaction rating from those surveyed, **only 36% were satisfied with the general collection at their branch** – nearly two-thirds of respondents were either dissatisfied or neutral about the adequacy of the general collection at the branches.*
- *The children's collections and multimedia collections at the branches also fared poorly – a majority of participants surveyed were either dissatisfied or neutral about the adequacy of these collections.*
- *Respondents indicated that many of the library programs offered at their branch were not robust enough to meet community needs - computer training and children's storytime were the programs most often rated as inadequate.*
- *In addition to wanting more room for enhanced library programs, patrons felt that more room was needed at the branch libraries for additional seating and computers - 60-80% of branch patrons indicated that seating at their branch was insufficient, while 40-75% of branch customers wanted more computers added at their branch.*

## E. Staff Interview Sessions

The Library conducted a total of four staff interview sessions attended by staff members from the Main Library and each of the three branches. At these roundtable discussions, staff members were asked to utilize their "insider expertise" and to share which features of their branches worked well and which features needed to be improved. Staff members not only provided invaluable information about the strengths and weaknesses of the branches at which they worked; they also suggested strategies of how their facility could be improved to better meet the needs of the customers in their service area and San Leandro as a whole.

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## F. Presentations of the Facilities Study and Prototypical Design Elements

After the draft *Study* was presented to the San Leandro City Council in a work session, the project team went back to the public to introduce and solicit input on the *Study* concepts. These concepts included both the strategy for locating branches as well as prototypical design elements that will be present in all of the facilities. These elements respond directly to the input received throughout the process from the community. These elements include not only the recommended service levels--the components of the library facilities, but also the design of the facilities in a way that responds to the community's identity and needs. For instance, the view of the branch libraries as community gathering places is highlighted in the shared resources area which will connect all ages of users while still allowing for adequate separation between adult and youth users who wish for privacy. Also, the design strives to achieve the comfortable atmosphere that patrons indicated they liked in the existing libraries through the design of reading and study nooks and the use of daylighting throughout the buildings.

The prototypical elements were illustrated with the conceptual design for the Manor Branch Library, and are further described in the *Manor Branch Library Conceptual Design Report*. Exit surveys completed by participants in the public meetings indicated their appreciation for the increase in size of both facilities and parking, the family/shared reading areas, the use of energy-saving elements such as daylight harvesting, and increased ADA accessibility. Participants had concerns about the funding for the project and, for South branch, that the site selection for the South Branch be near its current highly accessible location.

By the time this planning process is completed, the Library will have made several presentations to key groups of stakeholders including city council members, library commissioners, and library staff. In addition, the Library intends to make additional presentations to these and other stakeholders as the *Branch Libraries Study* moves forward.

### **This Study was Developed & Confirmed with Community Input**

Throughout the planning process, the Library and consultant team made a comprehensive effort to hear from as many different voices and vantage points as possible. San Leandro residents responded to this effort with insightful and passionate ideas on how to improve library services and facilities in their neighborhoods. Indeed, community participation provided the very foundation upon which the *Branch Libraries Study* was built – it helped the Library to identify needs and to develop recommendations to meet those needs.

### **Ongoing Community Participation**



San Leandro residents provided tremendous insight into the best ways to improve branch libraries.