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THE SAN JOSE JOINT LIBRARY:
THE DEVELOPMENT OF A JOINT CITY/UNIVERSITY LIBRARY

A Thesis

Presented to

The Faculty of the School of Library and Information Science

San Jose State University

In Partial Fulfillment

of the Requirements for the Degree

Master of Library and Information Science

by

Joel Eanes

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The Designated Thesis Committee Approves the Thesis Titled

THE SAN JOSE JOINT LIBRARY:
THE DEVELOPMENT OF A JOINT CITY/UNIVERSITY LIBRARY

by

Joel Eanes

APPROVED FOR THE SCHOOL OF LIBRARY AND INFORMATION SCIENCE

SAN JOSE STATE UNIVERSITY

August 2010

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ABSTRACT

THE SAN JOSE JOINT LIBRARY:
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by

Joel Eanes

The Dr. Martin Luther King, Jr., Library is the largest library building west of the Mississippi River, and uses a rare joint library structure, merging the main San Jose Public Library and the library of San Jose State University. Both the decision to construct a new library, and the decision to merge two institutions, caused enormous controversy during the development and construction of the building from 1997 to 2003.

This thesis examines the nature of joint libraries, and why the city of San Jose and San Jose State University decided to pursue the joint library option. An unusual combination of geographic, economic, and political reasons persuaded both city and university authorities that the joint library option was the most appropriate model for the new Dr. Martin Luther King, Jr., Library.

TABLE OF CONTENTS

Introduction	1
Chapter 1: The Joint Library Option	13
Chapter 2: The City, the University, and the Redevelopment Agency	22
Chapter 3: The Proposal	35
Chapter 4: The Battle of the Library	48
Chapter 5: The King Library	65
Conclusion	73
References	78

INTRODUCTION

At the corner of Fourth and San Fernando Streets in the heart of downtown San Jose, California, on the northwest corner of the campus of San Jose State University, stands the Dr. Martin Luther King, Jr., Library, the largest library building west of the Mississippi River. It is a nearly unique entity in the United States, merging the main San Jose Public Library with the library of San Jose State University. Combined under a single roof are the collections of both a public library and an academic library, on subjects from cookbooks to physics, gardening to Supreme Court decisions, 1.5 million volumes and counting. Both the city and the university have had libraries, each occupying a succession of structures, for more than a century, and when those structures needed to be replaced, nothing inexorably pointed toward a merged structure. Neither is establishing a joint library solely a matter of two institutions sharing a building, as roommates might share an apartment. Entire departments within the two institutions have been merged, while others have been deliberately separated. This unusual arrangement was the result of a combination of geographic, economic, and political reasons within a certain place and time. Before, they had been but a few blocks apart, yet existed in different worlds. Now they are one.

Yet, ask critics, at what cost?

This study will examine the two former libraries—the main library of the city of San Jose, located on San Carlos Street, and of San Jose State University four blocks away, which was awkwardly split between two different buildings—and the decision to develop a joint library. Constructing a new library for either or both entities did not

inevitably require that the facility be combined. Neither is merely sharing a building the same as merging the institutions. The decision was made to construct the new building, and develop a co-managed "married" institution, as a joint library, a step almost nobody foresaw. Ferocious opposition emerged almost from the moment the idea was proposed, and success was not certain. For each of the challenges made by the many critics, an answer needed to be offered, or the proposal needed to be modified. Many current features of the structure can be explained in this manner. Countless specific decisions needed to be made, from how, or if, to accommodate borrowers from one institution seeking the materials of another; the physical arrangement of collections; retaining or discarding overlapping items; which system of classification to use; staffing issues, such as union contracts and salary schedules; and which specific service desks and technical services functions to merge or keep separate, from reference to circulation, from security to custodial services In no case was the outcome a certainty, and even in later years modifications were being made to the original plan. On several occasions, the project was almost derailed. A great deal of money, and the prestige of two institutions, was on the line, and the world, from municipalities to redevelopment agencies to the California State Legislature, was watching the outcome. More ominously, as its leading proponent on the municipal side, Mayor Susan Hammer, observed, "It could have been a real disaster" (Jordan, 2005, p. 48).

As the 1990s came to a close, both the main San Jose Public Library and the library of San Jose State University had outgrown their buildings. The main public library building, constructed in 1970, was too small for its collection, requiring the library

to discard existing items to make room for new acquisitions. The building was also inefficiently designed, with a disproportionate share devoted to corridors, immovable infrastructure such as air conditioning and heating, and offices, with too little space available for collections and service desks. Moreover, to the chagrin of the city of San Jose, the facility was located adjacent to the McEnery Convention Center. The city wanted to expand the convention center in order to accommodate larger conventions, but any possibility of expansion was blocked by the presence of the library. However, little political incentive existed in the San Jose City Council to improve the downtown main library, because the bulk of the library system's business was conducted in the 17 branches. Many city patrons believed that any money devoted to the expansion of the downtown library could better be devoted to improving branch service.

Four blocks down San Carlos Street sat the campus of San Jose State University, which faced a similar issue. The university's library facilities were divided between the John T. Wahlquist Library, which consisted of three separate buildings that had been connected into a single complex, and, halfway across campus, the Robert D. Clark Library, which had been slashed in size from its original plans due to budget-cutting. Originally, Clark would have replaced Wahlquist, but due to the decrease in size, instead the collection was separated by date between the buildings, requiring countless frustrating trips between locations to conduct research. The two buildings combined were inadequate in size for the growing collection.

As the two institutions were only four blocks apart, and the city wanted the main library to move away from its site adjacent to the convention center, geography alone

raised the possibility of the main library relocating closer to the campus, and perhaps sharing a building. The city and the university could both benefit from this, at the least because operating an existing joint building, or constructing a new one, would cost less than if each constructed its own facility. However, a third player was about to become involved, the San Jose Redevelopment Agency. This was the agency that would allow the joint library project to begin.

Although nominally an agency of the city of San Jose, the Redevelopment Agency is effectively a mini-government of its own. As is true of many downtowns across the United States, downtown San Jose experienced an economic tailspin in the years after the Second World War. Using the automobile and the newly constructed highways, city residents lived, worked, and shopped in the suburbs instead of coming downtown. Downtown San Jose went into a steep economic decline, with high vacancy rates and crime. It became an economic drain on municipal government, with the cost of services, especially police protection, surpassing the property and sales tax revenue from downtown. In 1979, the Redevelopment Agency was established, with the mandate to use government money to start building projects that private developers would not touch. For this the agency had a powerful economic tool—state law provides that any tax revenue raised in downtown must be expended in downtown, not in the rest of the city. This became a self-perpetuating economic engine, with each new redevelopment project providing revenue for the next one. Downtown revitalized, with abandoned buildings being replaced with upscale stores, residential apartments, and eventually cultural institutions. By the late 1990s, the main San Jose Public Library was a conspicuous

exception to the overall pattern of revitalization. The Redevelopment Agency, flush with revenues from the technology boom, was interested in building a new library. This also meant, of interest to suburban patrons, that city money, no longer needed for a downtown project, would be available for the branches.

This was important not only to the city, but also to the university. While each campus in the California State University has an operating budget with which to cover annual operating expenditures, the system has only a single capital budget, for which each individual campus competes. For a large capital expenditure such as a library, San Jose State needed to access the systemwide capital budget. Because San Jose State is the oldest campus in the system, it has older infrastructure, which, combined with its localized, declining enrollment, made it unlikely to compete successfully for such money, unless a partner could be brought in, in which case this situation turned around dramatically. If San Jose State could co-fund a library project with the city and the Redevelopment Agency, then San Jose State could access systemwide capital funds far more readily than it could otherwise. Out of this delicate three-entity partnership among the city, the university, and the Redevelopment Agency, the joint King Library was born.

Jointly constructing a building, however, is not the same as merging the institutions. Planners needed to consider certain inherent differences between public and academic libraries. The two kinds of libraries tend to have different materials; operate on different schedules (with public libraries keeping hours similar to a retail store, and that are consistent year-round), while academic libraries usually open earlier, close later, and modify their hours over the year in accordance with the academic calendar; public

librarians are not necessarily scholars by inclination, and are usually supervised under a civil-service system, while academic librarians are often either faculty or quasi-faculty, usually on the tenure track, often hold at least master's degrees in subject specialties as well as in library science, and almost always need to relocate for new positions. Public libraries, most importantly, are usually seen as being for recreational as well as informal learning, while academic libraries are perceived to be for formal learning and faculty research. Could the cultures operate side by side, let alone combine? That was the challenge that would be faced in San Jose.

Literature Review

For a study of a public-university joint library, the library literature presents a paradox: Literature on the subject of joint libraries is abundant, and has become more so in more recent years. Amey's two studies (1979; 1987) have lengthy bibliographies—the latter, for instance, runs 36 pages and lists several hundred items. The California State Library's *Public and School Libraries* (2000) also lists numerous items. Karp's (1996) landmark review of the literature is 27 pages long and, as with Amey, lists several hundred items. However, reflecting the nature of joint libraries—usually small school-public libraries in sparsely populated rural locations—information on college-level libraries is sparse, with fewer than 15 items in each of those bibliographies pertaining to the subject, and several of those are brief news items. What few college-level references do exist refer, with few exceptions, to small junior colleges. This is for the simple reason that college-level joint libraries have historically been unusual, and thus have attracted less attention than the joint library in a rural school. Only in the last few years, with the

increase in the number of public-college libraries, including at baccalaureate-granting institutions, has the number of articles begun to increase, though these are still not common. This pattern reflects what an aberration from the usual pattern the San Jose experience is, with a large public library and a major university library, in the eleventh-largest city in the United States, combining.

As will be seen, the number of joint public-college libraries in the United States began to increase in the 1980s, especially in Florida, but increased significantly in the next two decades, with important examples in Colorado, Minnesota, and Texas. The library literature reflects this pattern, with an increase in the number of articles commencing in the early 1990s. An early example is an influential examination by Call (1993). Call notes, "[T]he desired outcome [of the merger] is that by combining the resources available from two or more agencies or institutions and sharing the operational costs, the patrons from each of the parties involved will have access to more library materials and services at less expense." Call adds the "significant disadvantage…is the adjustment that each of the partners has to make in becoming sensitive to the needs of the other" (p. 551). Reviewing three separate college-level joint projects, he identifies the potential pitfalls as well as advantages of such efforts.

Then *Colorado Libraries* published a special issue in 1999 devoted to joint projects, including at the college level. Colorado, straddling the Great Plains and the Rockies, has an especially large number of school-public libraries, and in the 1990s established several joint libraries between public libraries and junior colleges. In the issue, a series of case studies examines how joint libraries came to be founded and

operated in several Colorado cities. Contributors include Reno, who discusses the unusual situation that led to Front Range Community College entering into several joint-use agreements with public libraries, while Sullivan considers the logistical challenges involved in creating a new building, with special challenges for a joint structure, and merging two collections, staffs, and catalogs. Saferite examines especially the challenge of creating a joint-use agreement, which many contributors to the literature agree is the important foundation for the future project. Paladino and Connole consider the experience of two additional colleges. A common set of themes running through these and other writings is the importance of political support from the governing body; the importance of soliciting support from the patron base for a new kind of library; difficulties in merging incompatible technological systems, such as catalogs; and the difference between sharing a building and merging the institution. All of these would be seen in San Jose.

Florida, as will be seen, has been at the forefront of joint public-college libraries, and an important study for that is Anderson's (1999). As is common in the literature, Anderson emphasizes the joint-use agreement. Anderson also notes the importance of determining if libraries have a broad commonality of their collections and usage, as a research institution may have less chance of success than, for instance, a junior college, due to the great difference between the patron bases. "If commonalities in the missions of the library exist, then the project has a chance for success," Anderson advises (p. 84). Lastly, she notes the importance of the building itself. "The library building design is a major consideration in providing services to different patron groups. Quiet study must be

balanced with children's programming" (p. 85). New joint libraries often involve the construction of a new building, not merely the adaptation of an existing structure.

The next decade saw a significant increase in the examination of college joint libraries in the United States. Several important case studies of joint libraries were published. Dornseif and Draves (2003) call joint libraries "the ultimate form of collaboration" when discussing the establishment of Harmony Library in Colorado, another in the series of joint libraries previously discussed in *Colorado Libraries* four years earlier. That library was especially ambitious as it was a full merger, with the line of separation between the libraries simply disappearing. Another ambitious library project discussed in the literature is the opening of three separate joint libraries in Harris County, Texas. One of these three projects was between the county public library and the library of the city of Houston, but two others were with campuses of North Harris Montgomery Community College District. Park (2005) concludes, "The benefits that the joint use libraries offer our users far outweigh the challenges that have to be faced" (p. 10).

The most prominent joint library other than San Jose's is the immense Nova Southeastern University library in Florida. Of this project, Marie (2007) reports, "NSU/BCPL has certainly lived up to its promise…The facility is drawing patrons in record numbers. Increases are being seen in usage, circulation, reference questions, and program attendance. Broward county citizens are undoubtedly positively affected, as more of them are checking out material previously considered academic" (p. 25).

The previous works deal with progressively larger institutions and discuss some of the difficulties in the specific libraries which they examine. Broader works on joint libraries as a whole have been produced by such authors as Bundy and Kratz. In addition, book-length special issues or books have been issued. Bundy (2003) contributed a lengthy chapter in the compilation *Planning the Modern Public Library Building* on the subject of joint libraries, and two special issues of journals, *Resource Sharing & Information Networks* and *Library Trends*, addressed joint libraries, including at the college level. More recently, McNicol (2008) published *Joint-Use Libraries: Libraries for the Future*, a rare book-length examination of joint libraries, which also includes information on European academic joint libraries, including a case that is little-known in the United States, the National Library of Iceland/University of Iceland Library.

As will become clear in the following chapters, the San Jose experience is unique among joint libraries in its scope. In contrast to the usual pattern of joint libraries being used for small communities, or for smaller colleges, the King Library is for the eleventh-largest city in the United States. This project has itself led to a variety of contributions to the library literature. As early as 1999, *American Libraries* featured an interview with San Jose City Librarian Jane Light, in which she describes the advantages in cost and service available at a joint library. Woods (2004), Information Technology Director at the library, describes the enormous task of merging two largely incompatible technological networks, including the two institutions' websites, catalogs, and telephone systems, as well as the difficulty in merging the two separate information technology

staffs. The public library's staff was hourly and each was familiar with the larger system, while the university's staff was salaried and more specialized.

Kauppila and Russell (2003) explore how the two libraries came to be a joint library, and the difficult business of determining how and what to merge among the libraries' operations. They predict that joint libraries will become more common in the future, taking advantage of the financial advantages of economies of scale. Money not expended on duplicative functions such as cataloging and information technology, as well as on the construction and maintenance of the building itself, is then available for expanding collections and hours. Woods, along with Breivik and Budd (2005), gives the fullest description to date of the difficulties of merging the two institutions.

Most recently, Meserve, Belanger, Bowlby, and Rosenblum (2009) describe the application of the model of tiered reference to the King Library. These articles demonstrate that, although the joint library at San Jose is presently only a few years old, it is already producing new insights for the library profession.

For years joint libraries, perhaps because they were associated with small, rural communities, were considered to be a last resort, or a temporary measure until a community grew large enough to afford a larger library. This may explain the relative lack of literature on them for many years until the 1970s, especially at the college level. Joint libraries at the college level were rare in the United States until Broward County's experiment began in 1983, and the literature on college-level joint libraries has increased greatly since then. Large joint-use libraries, most notably the Nova Southeastern University Library and San Jose's King Library, have brought more attention to the

potential of joint-use libraries in the academic community, and additional literature in the library profession on the subject can be expected in the coming years.

Chapter 1

THE JOINT LIBRARY OPTION

The joint city/university library proposed for San Jose is by far the most ambitious joint library proposal made in the United States. Joint libraries are not, however, unknown, albeit on a far smaller scale, in the country; in addition, several examples exist in Australia, Canada, and Europe. As the San Jose proposal was scrutinized, both proponents and opponents of the proposal turned their attention to this once-obscure corner of the library world.

Many libraries have associations with other libraries. These ties may exist in the form of memberships in consortia, or arrangements for interlibrary loans, or in joint catalogs. Public libraries are often part of a larger public library system. A large city might have a main library and various branches, or rural systems may have branches spread across several counties. Academic libraries, especially in public systems, are often part of a larger system, such as the California Community Colleges, California State University, and University of California. Some libraries cooperate in their collection development, or in some cases may go so far as to interfile their collections. Bryn Mawr, Haverford, and Swarthmore Colleges, for instance, located some 10 miles apart, maintain the single Tripod catalog (Seiden, Pumroy, & Medeiros, 2002). In rare cases, libraries may share quarters for economy, though this is not the same as a true joint library, and economy is not always the primary motivation. One study, for instance, cautions, “Savings to the taxpayer are purported to be found in the avoidance of

duplication of expensive material and overhead expenses such as the building, lighting, heating, and custodial services. However, if reading by the adult or the student is inhibited, there is only a poor return on investment" (Haycock, 1979, p. 7). Co-location of collection and staff, under either one manager or two, is the next step, a joint library. Speaking of school-public libraries, Kenneth Haycock has said,

> It is important to distinguish dual use libraries from other levels of cooperation. In general, libraries and systems may cooperate at least informally in sharing resources, services, and expertise. These levels of cooperation may range from simple courtesy (class visits), to specific services for a related group (homework centers), to more formal cooperation (joint programs for promotion of reading); much less common is collaboration, in which two equal partners solve common community programs together (for example, an outcomes-based joint family literacy initiative). (Haycock, 2006, p. 489)

Within the United States, the most common form of joint library has long been the joint school-public library. This is almost always found in a sparsely populated rural location, distant from a large city, at which population, distance, and lean economic base preclude the establishment of another sort of library service. For such locations, the other alternatives are either the bookmobile, or worse, no library service of any kind (McNicol, 2008). As time passes and populations and economies expand, these alternatives become less common. As Haycock continues, a joint library

> can translate into professional staff where none existed previously, longer hours, and a broader range of information sources and literacy programs for the community. The bottom line is that there may be no viable alternative for a reasonable level of school or public library service in a small community. (Haycock, 2006, p. 490)

In these cases, joint libraries exist not as a positive good, but as a last resort in the absence of another alternative.

Joint libraries date back at least to 1559, with the opening of the Bibliothèque Publique et Universitaire in Geneva. Australia and Canada, with their large territorial expanses and relatively sparse populations, have a large number of joint libraries. In the United States, one current joint library, located in New Hampshire, has operated continuously since 1906. These tend to be smaller rural libraries, while on the other extreme, in 1957 Iceland merged the National Library of Iceland with the library of the University of Iceland (McNicol, 2008).

Joint libraries fall into one of three broad categories. The first is the “duplex” or “flatmates” library, in which two libraries share a building. Even an individual library may share a building with another institution, such as a branch library in a shopping center, a law library in a courthouse, or a medical library in a hospital. A joint library of the “duplex” variety may share a building with another library, just as an office building may have a variety of offices, and a shopping center a variety of different stores. Their interaction is usually limited to routine building issues such as maintenance or custodial services. In the center is the “married” library, which is usually co-managed, and where

services exist on a continuum from fully merged to completely separate. Cataloging, for example, is fundamentally the same (albeit using different classification systems) for either a public or an academic library, and would often be merged. The most ambitious effort, and the least common, is the truly merged library, in which the line of separation between the institutions no longer exists. Traditionally, these predominantly existed as school-public libraries, but joint libraries involving colleges have become more common in recent years.

The most prominent jurisdiction to use a joint library in the United States is Broward County in Florida. The county, with a population of nearly two million, has entered into several joint-use agreements in past years, starting with the Broward Community College/South Regional Library in 1983. This gave the county extensive experience in several aspects of the operation of a joint library, including co-management, merging and cataloging different collections, and the use of dual library cards (Call, 1993; Imhoff, 2001). One of these mergers was the opening of a joint library between the downtown Fort Lauderdale Main Library and the downtown Florida Atlantic University Library, expanding the operation of joint libraries to the university level (Imhoff, 2001).

A more ambitious merger was Nova Southeastern University's 1997 proposal to merge its private academic library with one of Broward County's public library branches. To take this proposal one step further, one partner, the private Nova Southeastern University, would manage the institution, meaning that the public library would be contracted out (Eberhardt, 1999).

The beginning of this new library was distinctly different from the usual pattern, where two libraries decide at the beginning of the project to establish a new joint library, as Nova had already committed to constructing a five-story, 280,000-square-foot library for its 29,000 students. The question was solely if the county would join in the project. If so, Nova would contribute the land, $8 million for construction, and commit to pay for a $2.5 million expansion after 10 years. The county paid for $18.7 million in construction costs, and constructed a parking garage. This was a new experience, for previously, the public library had managed its own facilities (Imhoff, 2001; MacDougall & Quinlan, 2001).

The county and the university approved a 54-page joint operating agreement. Several sources stress the importance of such agreements (Schwanz, 2000). Alan Bundy's study, for instance, notes,

> The literature places considerable emphasis on maintaining a written record of all understandings and commitments leading to the establishment of the library. Similarly emphasized are the content and detail of formal agreements. If these are deficient in five major aspects in particular, the operation of a joint-use library may prove to be extremely demanding and, at worst, very stressful, for its staff. The five areas that should be emphasized in agreements are space, staffing and staff development, information technology, the role of a governing board, and evaluation. (Bundy, 2003, p. 139)

Similarly, Donald Riggs, President of Nova Southeastern University, advises,

> One cannot overemphasize the importance of the joint-use agreement. Of course, lawyers for each constituent must be involved in developing the agreement. And the agreement must be endorsed by individuals at the highest level of commitment (e.g., president of institution of higher education and president of governing board of the public library). A memorandum of understanding (addressing operational aspects of the joint-use library) should be formulated after the agreement. These very important documents represent a relationship built on trust and aimed at maximizing the mutual benefits of both parties. (Riggs, 2000, p. 97)

Another informative example of the functioning of a joint library at the college level is with Harmony Library, jointly operated by the city of Fort Collins and Front Range Community College in Colorado. In the words of two librarians at Harmony Library, "In spite of prominent signage that identifies the library as both a public and college library, some users approach the service desk hesitantly, questioning their right to use the facility. Staff must reassure all users that the library is both a public and college library, and that all are welcome and valued" (Dornseif & Draves, 2003, p. 6).

Such an ambitious effort—a full merger, not a "duplex" or "married" model—faces additional difficulties, and may be eased by working with a junior college, where less difference exists between the collections than in a research library, and where, for instance, using a single catalog is easier. As with San Jose, the effort in Fort Collins developed began when a city and a college each needed a new library, and each could receive complementary benefits. As two librarians note,

> Each of the Harmony Library partners came to the table with some strengths and needs. The college had land in a good location, funds for construction, furniture and equipment, one-time technology money, and a librarian. It needed more materials and more staff. The city could contribute a much larger collection and funding to purchase more materials, limited construction funding, ongoing technology funding, a skilled staff, and a large and active patron base. (Dornseif & Draves, 2003, p. 5)

The benefits of cooperation followed after opening. Dornseif and Draves explain, "Parents in the library for story time are able to locate materials for personal or professional growth that they might not find in a standard public library branch. Casual browsers in the periodicals area may be pleased and surprised to find intriguing journals not found in most public libraries" (Dornseif & Draves, 2003, p. 5).

One additional case that is illuminating for those studying the San Jose joint library is the Harris County Public Library in Texas, which has opened three joint branch libraries since August 2003, two of them with local colleges. Although the county already operated a joint library with the city of Houston, opening a joint library with the North Harris Montgomery Community College District was more difficult: "The greatest challenges occurred with the joint use libraries offered with the community colleges," recalls the director of the public library, Catherine Park (Park, 2005, p. 9). Park continues,

The most significant challenges of these joint use libraries with the community colleges have been the following:

- Blending the operations of a public library and community college into a seamless integrated community library—policies, procedures, technology, circulation, etc.;
- Developing a working rapport among the planning team with the willingness of each team member to openly and respectfully discuss concerns;
- Keeping all team members focused on planning the building and operations for the common goal of providing excellent service to the user (compromising for this common goal is essential);
- Looking beyond the traditional approach to service;
- Establishing and addressing deal breakers—classification scheme, management structure, etc.;
- Focusing team members on looking for solutions; and
- Not being in total control of the project. (Park, 2005, p. 9)

Those words could easily have been written by a member of the San Jose library staff.

A last important joint library that is a useful comparison case with San Jose's is the joint library of the St. Paul Public Library and Metropolitan State University in Minnesota, which opened in 2004. The Dayton's Bluff neighborhood lacked a branch library, and similarly, the campus had no library. As in San Jose, an ambitious university

president, Wilson Bradshaw, commenced conversations with the city in 1996, and the city and the university decided that constructing one joint library would be the most economical option. Bradshaw stated, "It is my belief that without this partnership there would not be a St. Paul Public Library Branch in the Dayton's Bluff neighborhood. It is also unlikely that Metropolitan State's building plans would have met with such strong private and state support without our collaboration with the St. Paul Public Library" (Brookes & Ryan, 2007, p. 9).

The library has taken advantage of its connection between the public and academic libraries by bringing elementary school students onto a college campus to sample classes and examine the library, and to be taught library skills by a university librarian. Similarly, students from the university's teaching program assist in the homework help program and the computer classes. Public cardholders can access materials such as databases that would be beyond the budget of many public libraries. Despite these forms of cooperation, the Dayton's Bluff library maintains a dual management system and separate library cards (Brookes & Ryan, 2007; McNicol, 2008).

In any merger of two or more institutions, whether they are "flatmates," "married," or merged, each institution will lose some of its former identity. The heads of each institution believe the libraries will benefit by a establishing a joint library, or they would not enter into the agreement. Are the libraries' similarities greater than the differences? Are the differences conflicting, or complementary? Those were the questions that were about to be at the center of debate in San Jose.

Chapter 2

THE CITY, THE UNIVERSITY, AND THE REDEVELOPMENT AGENCY

Although San Jose's joint city/university library was an innovation, having a library, city or university, in downtown San Jose was not. In 1872, prominent citizens in San Jose formed the San Jose Library Association, which with donations established a library and reading room on the second floor of the Knox Building on the corner of First and Santa Clara Streets. The library was a subscription library, requiring a $25 annual fee, but after six years the private library was donated to the city of San Jose, and it became the San Jose Public Library (Brockway, 1977; Garboske, 1996). The library later moved to the then–City Hall on Market and Santa Clara Streets.

In 1903, department store owner O.A. Hale, after soliciting by mail, took a train east to meet with library philanthropist Andrew Carnegie, who donated $50,000 in construction money. The city promised an additional $10,000, as well as $5,000 per year to operate a new facility to be constructed on Fourth and San Fernando Streets, at that time city property. In a recurring pattern, the library outgrew its quarters, both for collections and for the diversification of services; a children's room was established in the basement, for lack of any other location. In 1937, the city library moved to the former post office on Market Street, and after a voter referendum the Carnegie Library was sold for $50,000 to San Jose State College as its new student union. In 1970, the city library was moved from the old post office to a new facility on San Carlos Street (Grant, 1997).

As the 1990s began, the main public library's shortcomings were becoming increasingly apparent to patrons. The city's main library was downtown, a few blocks west of the university. Although the building was relatively new, it was soon filled to capacity. For every new item added to the collection, an old one needed to be discarded. As early as 1986, a report by the consulting firm Professional Library Consultants concluded a new library was needed, and advised, "[T]he decision process toward the library construction [should] be started immediately since the present Main Library is inadequate for today's population and construction costs are apt to increase annually" (*Proposed Main Library Building Deficiencies*, 1998).

The cramped building was inefficiently configured, with only about half its floor space available for collections or public services. A full quarter was assigned to transportation corridors or infrastructure, unavailable for technical services or administration. Deficiencies in transportation and parking further diminished the main library's usefulness to potential patrons. Public library patrons overwhelmingly preferred the suburban branch libraries. Seating and computer capacity in both the main and branch libraries was limited, as was the ability to acquire new materials. When Jim Fish arrived as the new city librarian in 1990, he was startled to find that the library still used rotary telephones, and he was unable to hold conference calls (Scheinin, 1991).

Although the main library was decrepit, San Jose had a thriving set of branch libraries. After the passage of the Measure E assessment district in 1994—a 10-year, $25 per lot tax—an expansion of branch libraries followed, with the number of new items acquired per year increasing from 146,174 in 1994–1995 to 261,582 in 1996–1997, and

items loaned per year increasing by some 20%. After the passage of the measure, two new branch libraries, Biblioteca Latinoamericana (which had been housed in the cafeteria of a closed school) and Alviso, were built, the first new branches since Santa Teresa in 1984. Libraries were wired for the Internet, and high–speed lines started to be added (Bartindale, 1997; Egner, 1997). Fish noted, "Branch needs are more compelling at the moment. We're not bailing out on a new main library, we're just being realistic" (Scheinin, 1991, p. 8E).

San Jose State University has also long had its library, dating back to its founding in San Francisco as California's first institution of public higher education in 1857. At that point the campus was to be a normal school, or school for the training of teachers, while a separate University of California (now Berkeley) was founded in 1868 for academic education—nevertheless the Normal School included a rigorous liberal arts curriculum, necessitating in turn a library. In 1864, Principal Ahira Holmes noted, "The nucleus for a library and cabinet has also been formed. About three hundred volumes have already been collected by purchase and donation, exclusive of about five hundred and fifty volumes of the authorized text-books" (Gilbert & Burdick, 1980, p. 34).

The school later moved from San Francisco to Washington Square in San Jose. The building, including most of the 8,000 volume collection of the library, was lost to a fire in 1880, but a new library was reestablished within a year, and the first full-time librarian, Ruth Royce, was named. By 1888, she had built the library to 7,000 volumes (Gilbert & Burdick, 1980; Greathead, 1928). After that building was damaged in the 1906 earthquake, a new library was established in Tower Hall, and there the library

would remain until the opening of the much-larger Wahlquist building in 1941, with twelve staff members and 70,000 volumes. As with the Clark Library forty years later, the building's size was reduced due to budget cuts. An addition was completed in 1956, and a year later, the college's centennial celebration noted, "Today the library has approximately 161,000 volumes, and a staff of 28 professional librarians, and 23 clerical employees" (Gilbert, 1957, p. 222). A third addition to Wahlquist was opened in 1961. These changes in the library coincided with the institution's advancement from normal school to teacher's college to university.

Due to San Jose State's limited space—92 acres bounded by Fourth, San Fernando, Tenth, and San Salvador Streets—adding a new building requires either demolishing an older one, or diminishing the limited open space on the campus. During the second half of the century, the library collection was dispersed between two complexes, the three-building Wahlquist Library and the Clark Library, a smaller structure opened in 1982. Much of the Clark Library's original space was removed from its blueprints shortly before construction began. None of the structures was adequate in space or efficient in design internally, and moving between them subtracted further from their usefulness to patrons. With the rise of computer use in the late 1980s, patrons increasingly found the university libraries to be deficient (Walsh, 2000).

San Jose State had been on a building boom since the 1950s. Partly due to postwar growth, the campus added at least 38 new structures in the following two decades. Construction was centrally planned from the California State University, with an emphasis on high speed and low cost in building, to accommodate veterans entering

school after the Second World War and later the Korean War. By the early sixties, the campus was expanding east of Seventh and south of San Carlos Streets, but in the seventies the boom diminished. A downtown campus had fewer enrollments, while new state university campuses were opening every few years.

Due to the building boom of past years, the campus required extensive maintenance for now-aging buildings, especially for seismic retrofitting. In addition, most postwar buildings were one to at most three stories, making inefficient use of limited space. The state required the establishment of a master plan for capital projects, with all campuses in the California State University drawing from a single systemwide capital budget, and little money was forthcoming for an aging campus with diminishing enrollment. Over the years between the postwar boom and the beginning of the nineties, "deferred maintenance" became an official line item in the campus budget, with more deferred by the year. By 1999, it totaled $125 million, divided into three levels of priority. During the administration of President Gail Fullerton from 1978 to 1991, new buildings were largely funded by donations, modular buildings were constructed on the east side of campus, and money went toward renovating three remaining prewar buildings, the Central Classrooms, Dwight Bentel Hall, and the Science Building (later Washington Square Hall) (Walsh, 2000).

Although campus enrollment and construction decreased, the library's collection continued to grow, partly the result of the explosion of research in the 1960s and 1970s. To understand the disconnection between the campus as a whole and the university library, one must understand the different ways in which they developed. For 42 years,

from 1923 to 1965, the library had been under the administration of Joyce Backus. One critical history of the university says,

> During the intervening years Backus served dutifully, but the university changed while she did not. She retained a fixed understanding of a teacher's college even after the professionalization of the faculty under President Wahlquist. She had persisted in spending library funds on textbooks since the Great Depression.
>
> While Backus regularly proclaimed, "This is not a research institution," she was officially correct. Unofficially, she resisted the expansion of knowledge development as an innovative force in knowledge acquisition. Also, she resisted students who wanted the library opened longer, and the faculty who wanted monographs and journals in science and the arts. (Walsh, 2000, pp. 129–130)

In 1978, the university received approval for a new library. The Clark Library that followed was a shadow of its original potential, and its limitations unwittingly set the stage for the eventual construction of the King Library. Had Clark been built to its potential, King would not have been necessary. Despite the slowdown in campus growth, the library needed an expansion, and an optimistic plan for an $11.4 million, 18-story building was proposed in 1969. By 1973, the cost for the building had already escalated to $15 million, and the state would not fund it. When construction was finally approved in 1978, the building was slashed in size from 18 to 5 stories, for a cost of $12 million. In addition, under the philosophy of Governor Jerry Brown, traditional air conditioning

and heating were to be replaced by solar panels and a water tower, making the building difficult to use during hot or cold weather. (After Brown left office, the building was connected to the campus' central system, requiring expensive retrofitting.)

Due to the limited space in the new Clark building, Wahlquist continued to be used, with the collection split between the buildings according to publication date, and patrons were frustrated by the countless trips between buildings to conduct research. The construction of the Clark Library was widely considered to be a fiasco, especially when contrasted with the Student Union and enormous Events and Aquatics Centers, built without state funds (Walsh, 2000).

The libraries were also affected by their location in downtown San Jose. As is true of many central urban districts in the years after the Second World War, downtown San Jose experienced an economic downturn. With more space in which to grow than on the constrained Peninsula or the hilly East Bay, the Santa Clara Valley saw dramatic growth in suburban housing and the use of the automobile, and residents increasingly lived, worked, and shopped in the suburbs. In 1950, San Jose had some 95,000 residents and spread across 17 square miles. An aggressive program of expansion began under San Jose City Manager Dutch Hamann, who took over in 1950. During the next 19 years, he carried out more than 1,400 annexations. To avoid annexation, Campbell, Milpitas, Cupertino, and Saratoga, previously unincorporated neighborhoods, all incorporated during the fifties.

A large portion of central Santa Clara County was used for orchards, but then the aerospace and later high technology industries began large-scale expansion. By the end

of the fifties, downtown San Jose was in an economic tailspin. Hamann, steeped in prewar models of urban planning, took for granted that downtown must be the commercial center of the city. In 1951, the city of Santa Clara approved a new shopping center, the Valley Fair Mall. Hamann rushed to annex the site, but either needed to do so in plots not exceeding five acres, or obtain voter approval. In the race that followed, both cities annexed territory, and the new mall straddled the two cities (Ignoffo, 1996).

In 1958, the mall opened west of downtown, marking the beginning of a large-scale flight of downtown businesses as the city's economic center moved to the west. Such large hotels as the de Anza and the Sainte Claire became flop houses. The *Mercury News* relocated its headquarters to the northeast of the city. The county had begun moving its offices to the new Civic Center in the Hyde Park neighborhood as early as 1949, and in 1958, City Hall was relocated. Both City Hall and the county building, traditionally the last residents of any city's central core, were not to be found in downtown San Jose. A proposal in the mid-sixties to sell City Hall to the county and relocate to downtown went nowhere. Just as residents and businesses left downtown, so did library patrons, as a 1957 bond issue accelerated the building of new branch libraries for the suburbs.

San Jose State College, located in the center of downtown, became known as a residential school, with students living on campus, or a commuter school, with students commuting by the newly built highways, but few still living in downtown. The campus came to be seen as a fortress. Most of its new buildings in the sixties and seventies were constructed to face inward, and Fourth and San Fernando Streets were nicknamed "the

wall." Much of the remaining business in downtown consisted of low-rent establishments such as auto body shops and pawnshops, or unsavory institutions such as adult bars and pornographic theaters. Prostitution and drug-dealing thrived; by the1980s the parking lot of Lucky's Supermarket one block north of campus had a reputation as an open-air drug market (Canty, 1990; Claiborne, 2003; Walsh, 2000).

Early attempts to redevelop downtown were carried out in the model of urban renewal. In 1956, the Urban Renewal Agency was founded, but critics noted it was unable to persuade city and county governments to remain in downtown. Entire blocks were routinely razed, only to remain vacant when private purchasers would not then buy them. Then, in 1961, more than 200 small buildings on 59 acres were demolished to make way for the new Park Center, where several large office buildings, including the new main public library building, were constructed over several years (Ignoffo, 1996).

In 1979, the city established the Redevelopment Agency, with the power to rebuild locations deemed "blighted," that is, so dilapidated that private builders would not finance development in them. The previous approach had been to raze a lot and only then solicit developers—as Mayor Tom McEnery said, "The agency created a desert and called it progress" (Christensen, 1996, p. 227). Now, the Redevelopment Agency would build a new downtown. From 1980 to 1982, a 30-member Downtown Working Review Committee set out an extensive program for the redevelopment of downtown San Jose (Aidala & Skevos, 2003).

Under the leadership of Executive Director Frank Taylor, who previously had overseen the redevelopment of Cincinnati's riverfront, and Principal Architect Thomas

Aidala, and with support from a string of mayors beginning with McEnery, the agency set about rebuilding downtown. Three redevelopment plan areas—downtown proper, Edenvale (south of downtown), and Rincon de los Esteros (north)—were merged, allowing money to be shifted among them as needed. Under state law, property tax increases above the assessment year must stay within the redevelopment area, instead of being available for elsewhere in the city; in other words, any money raised by the economic expansion in a redevelopment area was placed back into further redevelopment, which in turn generated more revenue, for still more redevelopment. This provided a powerful engine for placing money in the agency, which was eager to spend it.

Soon, the formerly dilapidated industrial area to the north of downtown was attracting technology companies such as Cisco, IBM, Intel, Lucent, and Netscape, in a location that would previously have been occupied by factories or warehouses. Their dramatically higher property tax assessments pumped money into the agency—more than $60 million per year by the mid-nineties—and that money stayed downtown. This culminated when the Adobe Corporation was persuaded to relocate its headquarters, not to the industrial park, but to downtown proper. When the Internet boom struck at the end of the decade, a near river of money came flowing into the agency's coffers. A whole string of big-money projects followed, from renovation of the historic de Anza and Sainte Claire hotels, to the construction of museums, nightclubs, and theaters, renovation of parks, and other projects.

By the middle of the nineties, some $1.4 billion had been spent. Downtown commerce had been limited by the lack of transportation into downtown, so a light-rail line was constructed, and better transportation off the highways was provided. As redevelopment spread to the residential neighborhoods on the periphery of downtown, the police initiated Project Crackdown to address the widespread perception that downtown was unsafe. This was followed by new residential construction. Most downtowns have few residents—people come to work or shop, but return to the suburbs later in the day—and the few residential buildings that do exist are often low-rent (Claiborne, 2003; Fischer, 1993; Gross, 1994; Horayangura, 2003).

By the late 1990s, the revenue-generating industrial districts were allowing the transfer of tens of millions of dollars downtown, and downtown itself was beginning to generate tax revenue, some $7 million per year. Taylor aimed to make downtown more appealing to middle-class citizens who spend money, a philosophy that led to the construction of such retail complexes as the Pavilion. The commercial sites brought in tax money, but they were followed by facilities for sports and the arts, such as the HP Pavilion, McEnery Convention Center, Center for the Performing Arts, and San Jose Repertory Theater, among others (Hess, 2003). As John Kriken of the Redevelopment Agency said, "[A] downtown should contain a balance of open spaces and residential, retail/entertainment, cultural, civic, office, and visitor-serving uses, organizing into a compact, walkable area so as to maximize amenity, convenience, and economic strength" (Kriken, 2003, p. 30). A symbolic moment for downtown was the announcement of a new $380 million City Hall, marking the return of municipal government from the

government center on Hedding Street. In the middle part of the decade, attention began to focus on a conspicuous omission to these developments, the San Jose Public Library. In 1991, city library commissioner Michael Hurley observed, "[I]f this city was as devoted to building a library system as it is to building empty pavilions and subsidizing restaurants, I'm confident that Jim Fish could deliver the best public library system in the United States" (Scheinin, 1991, p. 8E). Indeed, the fate of the main library would be intertwined with the revitalization of San Jose's downtown.

The county law library, previously located in the county courthouse across from the post office, had left downtown at the end of the eighties, but the main library remained. It stood on valuable ground next to the convention center. The convention center, built in 1989, would, the agency hoped, use the new hotel space to attract conventions that previously had gone to Oakland or San Francisco, but it needed to expand beyond its cramped footprint. This geographic fact was itself incentive to the Redevelopment Agency to assist in the improvement of the main library, along with the larger attempt to revitalize downtown.

For a city and university needing money for new libraries which would be located downtown, an obvious source was the Redevelopment Agency. The city could also offer the agency the library site for the convention center. If the agency paid for a new main city library, the city's capital resources would be free for the branches, and the university could apply for capital funds from the state, citing the availability of a financial partner. With discussion of the inadequacies of the main public and university libraries, a new

joint venture loomed. The city, the university, and the Redevelopment Agency were about to meet.

Chapter 3

THE PROPOSAL

With the benefit of hindsight, one can see that the pieces were coming together for the confluence of events in the mid- and late 1990s that would lead to the new King Library. The public and university libraries had outgrown their spaces. San Jose's economy, which with the rest of California had struggled through the recession of the early nineties, was booming due to the explosive growth of technology industries. Downtown was revitalizing, and in the middle part of the decade, the interests of the city, university, and Redevelopment Agency were starting to converge.

On campus, long-time President Gail Fullerton retired in 1991. Administrative Vice President J. Handel Evans, like Frank Taylor an architect by profession, agreed to take over as interim president for a semester or two, while a national search was conducted for a new president. Evans made clear that he was not a candidate for a permanent position. The search turned into a fiasco, and bitter charges flew that the search had become politicized. None of the six finalists received widespread support, and eventually the likely finalist withdrew her candidacy. Evans was persuaded to stay on while a second search was conducted.

In the meantime, Evans was putting his architecture background to use. The Army was closing its operation at Ford Ord in nearby Monterey as a part of its post–Cold War reduction, and the California State University Chancellor's Office proposed using the facility, which had long operated as a military training base (its foreign languages

school was internationally famous), as a new state university campus. In November 1992, voters had rejected a state bond issue for capital improvements, cutting off capital expenditures for at least two years. Instead of building a campus anew, an existing facility could be retooled. San Jose State had provided instruction to that region, and to commuters from it, for many years, and Evans began looking into how the facilities could be modified for academic use. He also, under the influence of the National Collegiate Athletic Association, sought to improve the university's athletic teams (leading to the construction of the Stadium Center and Athletic Building under his watch). With these accomplishments, and having seen the unsuccessful candidates for the previous search for a new president, Evans decided for the second search to apply for the position himself. Whether by happenstance, or for campaign purposes, he also advanced an ambitious new initiative (Walsh, 2000).

An article in the December 4, 1994, *Mercury News*, entitled "Bookworms," reported,

> In his zest to keep the top job at San Jose State University, interim President J. Handel Evans surprised more than a few during a Q&A session Tuesday when he announced that he and Mayor Susan Hammer have talked about possibly building a joint city/university library on the site of the campus' administration building. But some on campus wondered if the announcement wasn't timed to garner favorable press—and smooth over feathers ruffled by the Scheller House fiasco—as Evans and four competitors for his job parade around campus.

> Hammer spokesman Kevin Pursglove says a conversation took place and the mayor "intends to pursue it." But where would the minimum $70 million to $80 80 [*sic*] million come from? San Jose State's plans for its own library expansion have been thrown into question with the failure of California voters to pass school bonds. San Jose voters, on the other hand, just approved a parcel tax that would raise more than $5 million a year in new library funds. City librarian Jim Fish likes the idea, but doubts the new library funds could be used for such a joint university-city project. SJSU librarian Jim Schmidt's ideas, meanwhile, include a large university contribution, a major private fund-raising campaign, and taking a look at "the redevelopment agency's bonding authority." (Bookworms, 1994, p. 2P)

Nine years before opening, the basic outline of the King Library project can already be seen. The university did not have money of its own for a new library, and the state was unable to provide capital funds (even if the university could successfully compete for them). However, the Redevelopment Agency's ability to issue millions of dollars in capital bonds for construction could provide most of the necessary money. At this early point, the most likely location for a new library was on the site of the old administration building, extending north from the Clark Library to San Fernando Street. This would have the advantage of easy connection to the Clark Library, replacing the postwar administration building instead of the historic Wahlquist complex, and allowing the Redevelopment Agency to extend its reach east along the north side of the campus.

Although that is not exactly how events unfolded, the early outline of the project is discernable.

Less than a month later, the California State University Board of Trustees passed over Evans and named Robert Caret of Towson State University to be president. An internationally known chemist, Caret satisfied the faculty's expectation of scholarly credentials. He had also held a string of administrative positions short of being a campus president. Caret emphasized the importance of campus connections with the larger community. One important effort was to close the roadways that crossed the campus on Seventh and San Carlos Streets, creating frustrating waits for pedestrians, and separating the campus into quadrants. Caret liked to say that San Jose State was a "metropolitan university," uniting the campus and the community. Fullerton and Evans had discussed joint projects with the city, especially the university's sports facilities, and Caret regularly attended meetings of the San Jose Chamber of Commerce, Joint Venture Silicon Valley, and the Silicon Valley Manufacturing Group (Walsh, 2000).

At the beginning, the vision of a joint library was only a vague concept—nothing was firm, from a straight merger, a simultaneous remodeling of two facilities, or a renovation of buildings without the construction of new buildings. In addition, building a joint facility does not require establishing a joint library; the two could merely share quarters in the same building. However, an idea had been formed, and it had been formed at the top of city government and the university. City Librarian Jane Light, who took over from Fish in 1997, expressed the view that the idea's initial proposal at the top levels of city and university administration was necessary to success. "If this had been an

idea of two library directors, we would still be trying to sell it, above and below," Light said. "It took bold leadership at the very top, where the people who control the resources are. The mayor and the president made the idea of a combined library their intent" (Berry, 2004, p. 34).

In late 1996, University Librarian James Schmidt received a call from Caret, asking him to look into a joint option for a library, and if a pressing reason existed not to pursue it. The body of research in the library profession was that joint libraries were most appropriate for small rural libraries that could not afford individual libraries, and that, practically by definition, the community served could not have a population greater than 10,000 (Haycock, 2006). (A nearby exception is at Sonoma State, which operated a joint library with the Rohnert Oak–Cotati School District.) Although Europe has several joint libraries between public and major university libraries, in the United States, a large city and a major university operating a joint library would be a significant aberration from the usual pattern.

Nonetheless, advantages exist. One 2003 study, for instance, found,

> [A]dvantages of joint-use projects include the creation of a bridge between the general public's needs and academic needs, the greater collaboration and sharing of resources, the more efficient use of funding, the extension of operating hours, the convenience of users by providing services in one location, more access to staff, and more opportunities for the development of information literacy and lifelong learning. (Kratz, 2003, p. 100)

Schmidt, whose recruitment to San Jose State was based partly upon his background in library buildings, concluded that if resources could be pooled to construct a building beyond the means of either individual institution, and if the Redevelopment Agency would put forward money to decrease the need for state capital bond money, the project could be pursued (Learmonth, 1997).

Schmidt said,

> The missions of the city's library and the university's library are more similar than many believe. An urban public library in a city of San Jose's size provides services and resources to a diverse population, supporting their recreational needs, their lifelong learning needs, and their informational needs as citizens in a democratic society. The library at a comprehensive nondoctoral urban institution like SJSU supports the curriculum and instructional needs of a university which has as its mission "liberally educating" a diverse population in applied and professional fields. A joint library will provide both libraries with core resources and services. (Rockman, 1999, p. 64)

City Librarian Light also emphasized the advantages, saying,

> I think there are three main advantages. One is improved access to a large print collection—our collection and the university's collection. Secondly, our space efficiency. We're paying to build about 150,000 square feet of the building, which will be 475,000 square feet, but we are getting the equivalent of about 200,000 square feet of space. The third is we'll end up

> with better service. The reduced duplication of tasks allows us to redeploy both libraries' staff to provide better or even new services. (Flagg, 1999, p. 40)

Geography was also a consideration. The two libraries were relatively close, and shared a significant overlap in patrons, with many students holding public cards (although the same was not necessarily true of public patrons). In addition, the main library was adjacent to the convention center. The convention center, with its potential for attracting major conventions that would otherwise go to Oakland or San Francisco, was shoehorned into an inadequate space, while the library could be relocated (Freeman, 2001).

On December 17, 1996, Caret sent a memorandum to campus planning staff under the heading "Capital budgets." It read,

> As we discussed at our recent meeting, San Jose State University, working with the City of San Jose, is proposing a joint effort related to the library expansion of Clark Library, which we currently have scheduled for fiscal year 2001. I hope that the system will be in a position to work with us to make this partnership initiative successful. Not only will it provide a facility that is badly needed by the campus, but it will provide a similar resource to the City, and will continue to reinforce the bridges we are building between our two institutions.
>
> I have been discussing the possibility of this partnership with the City since my arrival in January of 1995. Specifically, I have indicated to

the City it would be in both of our interests to undertake this effort together. In the short term, neither of us can afford to proceed on our own, and both of our initiatives are critical to the communities we serve. After a number of one-on-one discussions with the Mayor, the City Manager, the Chief Budget Officer for the City, and several members of the City Council, this idea has finally taken root. The City, and in particular the Mayor, is interested in pursuing the project, and would like to include an announcement of this desire in the February 3 address the Mayor will be presenting to the community. This address is her "State-of-the-City" annual address. I hasten to add that the Mayor does not expect us to work out all of the details regarding this proposal between now and February. What she is asking is that we commit to an open dialogue and to proceed with the project if the details can be worked out. We are both looking, she and I, at a potential target construction date of fiscal year '99.

Please refer to the attached capital plans for background. As you can see, the library project, as it is currently envisioned, calls for a 400,000 square foot facility on a footprint that currently contains our old administration building. This new expansion of the library would provide both replacement space for the campus, as well as new expansion space for the campus.

The City has indicated a willingness to provide approximately $10 to $15 million towards the project. If we were to scale back the project to

a more realistic level, given capital budgets as they currently exist, we would be looking at a project of approximately $45 million (approximately 30% self-supported), which would provide, we hope, approximately 200,000 net assignable square feet. Approximately 80,000 square feet of that net assignable square footage would be given to the City, while the remaining space would accrue to the campus. Such an expansion would provide us with sufficient space to meet our anticipated needs up through the year 2030.

Depending on the number of dollars actually provided by the City, we are looking at some sort of sale or leaseback arrangement, which would provide the City with a long-term lease, but would guarantee that the facility itself, as well as the land on which it resides, remain part of San Jose State University. In addition, we are trying to work out the details with the City of providing expanded parking for this facility, hopefully through the annexation of land across from the proposed new facility on the north side of San Fernando Street. There are at least two parcels of land that would provide a suitable footprint for a new combined parking facility. Not only would this facility service the new, expanded library, but it would also provide expanded parking space in general for both the university and the City.

We view this partnership as a win/win situation for the campus, the system, and the city. We appreciate your willingness to consider this

> initiative and look forward to further dialogue where an agreement might be reached to proceed with this project.
>
> I will schedule a meeting to discuss the next steps we should be taking together. If you have specific suggestions as to how we proceed, please do let me know as soon as possible. (Caret, 1996)

A university feasibility study found that San Jose State's new library would need to have some 525,000 square feet, costing about $120 million for the building alone, as well as furnishings and the extreme disruption of moving. The city would need a library of 250,000 square feet, which would cost about $60 million, assuming it was built on land owned by the city. If not, the cost of acquiring land (expensive in downtown) would need to be added. The California State University set a standard for capital projects of $135 per gross square foot of construction (Freeman, 2001). As Alan Freeman of San Jose State noted,

> As the discussions proceeded, it became quite clear that the university could have a library facility of a quality that the State of California would never support as a freestanding state project. The city also would be able to build a library without any land costs because the new library would be built on the campus. Savings in space and, thus, dollars; greater efficiencies; and greater quality in construction became evident as the investigation and negotiations progressed. (Freeman, 2001, pp. 21–22)

In these three sentences will be found the fundamental reason why the city and the university decided to pursue the joint library. Although the cost was higher than had

initially been anticipated, it would still be lower than constructing two buildings separately.

The two partners needed to decide where the library would be. Although Caret's memorandum suggested locating it on the site of the administration building, this was not the only option. Wahlquist was located on the northwest corner of the campus, and Clark in the center. While the university preferred a central location, easily accessible from any location on campus, the city insisted that the library be more easily accessible from off campus, especially from the central business district. In addition, a location on the periphery would reduce traffic from public patrons coming to use the library only, who may not want to travel through the rest of the campus.

Another possibility was the site of the theater building, which the university anticipated eventually replacing. Schmidt favored this option, instead of demolishing the historic Wahlquist structure in order to preserve a building slated for eventual replacement. However, the Redevelopment Agency would only contribute money for a project either in, or directly abutting, a designated improvement district This meant that the site of Wahlquist on Fourth and San Fernando Streets was the only option, despite the disadvantage of a relatively small, 60,000 square foot footprint for the building, necessitating a taller structure to accommodate 475,000 square feet of space. Both the administration and theater buildings were saved because they were slightly too far to the east (Freeman, 2001).

On the evening of Monday, February 3, 1997, Hammer delivered her seventh State of the City address before an audience of 1,800 at the McEnery Convention Center.

In contrast to the lean years of California's post–Cold War economic downturn, San Jose, then the eleventh-largest city in the United States, was flush with revenues from the late-nineties technology boom. "Never before has the news been so good. After six long years of fighting to protect what we have, we are poised to create for ourselves a new era of greater stability and well-being."

Hammer announced,

> San Jose's public library system is grossly inadequate for a city whose residents and business must confront global competition. The recent vote by the people for library funds has been helpful. But the stacks in our main library contain mostly popular subjects and current fiction, and we have less than half of the material that is available in many other big city libraries. Because of budget limitations, the idea of a state-of-the-art library, with materials worthy of Silicon Valley, has seemed an unreachable dream.
>
> At the same time that our city needs improved library services for our knowledge hungry public, San Jose State University is struggling to find resources for an expansion of its library. University President Robert Caret and I believe we can satisfy both our needs by joining forces.
>
> I propose the construction of a single new library on the edge of the San Jose State University campus. By pooling our resources, our residents will have access to an outstanding repository of books and materials—the university's collection—which includes a million volumes

> and thousands of periodicals. In return, San Jose State will receive financial support from the city and the Redevelopment Agency. This new library will be second to none in information technology. It can be part of a long-term plan to focus resources on our 17 branch libraries. Through this partnership, we can achieve what neither institution could accomplish by itself. (This Is a New Era for the Bold, 1997, p. 6B)

Proposing a new library is ambitious, but not necessarily controversial; proposing a joint library is quite another matter. Hammer had previously campaigned for Measure E in 1994, allowing the construction of new branches, and now the *Mercury News* dubbed Hammer "the library card mayor" and editorialized, "The library plan is just brilliant. If the building actually takes shape, it may well be the main accomplishment for which Hammer is remembered as mayor" (The Library Card Mayor Has a Brilliant Plan for San Jose State Partnership, 1997, p. 6B).

Not all were convinced. Within days, the proposal encountered major opposition. The battle to determine the future course of the two libraries had begun.

Chapter 4

THE BATTLE OF THE LIBRARY

Immediately after Mayor Susan Hammer had delivered her speech, President Robert Caret's office called him while on a trip to Idaho: "You better get back here fast!" Later, University Librarian Patricia Breivik (who succeeded James Schmidt in 1999) would recall, "The initial response was anything but positive" (Berry, 2004, p. 35).

Many within the libraries themselves were surprised. Recalled San Jose State University reference librarian Christina Peterson, "We all woke up one February morning in 1997 and read in the *San Jose Mercury News* that we would be part of this merger. It was a surprise to almost everybody in the library" (Mizzy, 2005, p. 598).

At a press conference the next morning, Caret said,

> Good morning! I am pleased to be talking with you today from Boise, where I am serving on an accreditation committee.
>
> I echo Mayor Hammer's comments that this partnership between San Jose and San Jose State is an incredible opportunity for the community that we both serve. Both the city and the university will benefit from this partnership. But the real beneficiaries are the city's residents, many of whom are students or alumni of San Jose State.
>
> As Silicon Valley's Metropolitan University, San Jose State is dedicated to partnership with business and industry, civic organizations,

and other members of this region. As educators, we are both dedicated to the sharing of knowledge. This partnership allows us to do both.

It is also an example of our commitment to a continuum of public education that spans kindergarten through college. In one building, we will unite our information collections. We will have books and materials for our schoolchildren. We will offer research materials and periodicals for our high school and college students—and for business and industry. And we will provide historical bases of information that will grow together, just as the City of San Jose and San Jose State University have grown together since the university's founding 140 years ago.

Our university students also will have additional library seats and study spaces that are so urgently needed. Each morning when I see our students standing in line to enter Clark Library, I am reminded that—especially in this information age—the library is at the heart of the university. It is a place where students come for a quiet seat to study or to work on a group project. A place where they come to check out a book, read a journal, or do an online search.

There are many issues yet to be worked out as we move this partnership from concept to construction. These issues include

- the location of the library in the northwest quadrant of campus;
- placement of the project on a higher education bond issue;
- traffic strategies with our community neighbors;

- parking and access to the new facility;
- and the ability to work cooperatively so that these two entities don't just co-exist, but flourish together.

We are very pleased to be a partner with the City of San Jose on this project which will benefit so many students and citizens of the region. I look forward to working on it with you, Mayor Hammer, and I look forward to standing with you once again as we did when we opened Paseo de San Carlos. (Caret, 1997)

As Caret noted, a bond issue needed to be placed on the November 1998 ballot, and then would be subject to voter approval, to provide the California State University with the necessary capital money for the project. For nearly two years, that would be the unknown that would hang over the proposal. If the bond issue was passed, the money would still need to be allocated to San Jose State by the larger California State University system, which required the university to present a better proposal to the Board of Trustees than the other campuses competing for that money. Approval from the San Jose City Council, the Redevelopment Agency, and ultimately the California State Legislature would be required for the project to continue.

Questions of cost quickly arose, with an early estimate of from $30 to $80 million. Hammer suggested the city contribute $10 million in redevelopment funds and the university $30 million. While Hammer cautioned that the $40 million figure was "very preliminary" and "a minimum," Budget Director Bob Brownstein added, "The San Jose State people said, 'Assuming the bond issue passed, we could get $30 million.' We

took a look at our other priorities and said, 'We think we can pull $10 million out of redevelopment.'" A wide variation existed in possible budget figures; in the last few years, San Francisco, Denver, and Phoenix had constructed new main public libraries for $134, $77, and $43 million, though this was partly due to differences in size, building design, and cost of living in those cities (Witt, 1997).

Skepticism quickly emerged from both the city and the university sides. While joint libraries have occasionally been used for small communities, and sometimes for small colleges, to carry out a joint library project in a major city was nearly unknown. As Walt Crawford wrote,

> I've heard about joint-use libraries here and abroad that were either good academic libraries and lousy public libraries or vice versa. These problematic libraries usually represent lip-service cooperation: public libraries with a token academic librarian or vice versa. That's a recipe for mediocrity at best. Public libraries and academic libraries are different institutions serving different (albeit overlapping) needs. One merged collection, staff, and approach will rarely suit both sets of needs well. (Crawford, 2003, p. 83)

Crawford's observation that libraries are different, but also overlapping, explains the reason to pursue a married, not merged, library. Having a joint library would allow for accessing far greater capital money for construction than would otherwise be available, as well as savings in construction and maintenance of the building, but pursuing a married structure would allow the new joint library to merge similar functions,

while keeping others separate. A married structure allows the libraries to be the same when they need to be, and different when they need to be. As Caret would say regarding the building, a joint structure "would allow us to build a facility that would not be possible in my lifetime." Newly named San Jose City Librarian Jane Light added for the institution, "There are no issues for which we can't imagine a solution" (Bartindale, 1998a, p. 23A).

Proponents quickly began working to gather support for the proposal. A single joint library would be less expensive, for the building, staff, and collection, than would two separate institutions. The new library, as initially proposed, would have 3,600 seats, while the three existing buildings combined had 1,900. The new building would also have far better technological capacity, both in number of computer stations, and in facilities for patrons to use their own laptop computers. It would have enough space to accommodate collections growth for 24 years, if acquisitions continued at the 1997 rate. Less money expended on the building itself would provide for a larger number of open hours than either library could then maintain. This was especially important for the university, which previously had decreased its hours during between semesters in order to conserve funds for the academic year (Rockman, 1999).

However, opponents from both the public and university sides quickly began questioning key aspects of the proposal. The first criticism from the public side regarded the new main library's position relative to the branches. A typical statement was from Mary Oliver, a library volunteer: "We need to remember our branches and think about them. If it takes money away from the branches, then I think it's not a good idea"

(Puzzanghera, 1997, pp. 1B). As Light stated, “They felt…that a new main library would take so many resources that the branches would lose out” (Berry, 2004, p. 36). However, the purpose of using redevelopment money was so that city money would not be needed for a downtown project. Public critics noted that some 80% of public circulations occurred in the 17 branch libraries (although that figure was skewed by the high number of borrowings from the children’s collections) and that many circulations were of items paged from the main library. In response to these criticisms, Light began traveling to different Friends’ meetings at the branch libraries, emphasizing that money for the main library would come from the Redevelopment Agency, not from the library’s budget. (Redevelopment money can only be spent in the three redevelopment areas, not in the rest of the city.) Later, Light went farther and suggested a bond measure would also be a possibility. “If redevelopment money builds the Main Library, we can leverage the concern about the branches, we can float a bond measure just for the neighborhood branches” (Berry, 2004, p. 36). (Measure O, the bond measure, was approved in 2000.) In addition, the university collection could potentially be made available for use by public patrons, either in a branch or downtown.

University patrons also had their doubts, the most prominent of which was the city’s insistence that public patrons must have access to the university’s collection. Academic items tend to be more expensive than public items, are subject to theft, and are more difficult to replace if lost or stolen. Public access could also mean a research project or thesis was delayed so a middle school student could lengthen a bibliography. This was an especially important concern for the English and history departments,

representing two subjects for which both public and university patrons had a shared interest. Students who did not return their books would not be awarded their degrees, but the new library would have a more difficult time retrieving materials from public patrons (Freeman, 2001). Soon, an organized effort was formed in opposition to the proposal, and hundreds of students signed petitions opposing the project (Goldberg, 1998; Guernsey, 1998). As Bruce Reynolds of the history department said, “No university that takes itself seriously as an academic institution of higher education would merge its academic library with a public library and throw its collections open to the public” (Bartindale, 1998a, p. 23A). Similarly, English professor Scott Rice stated, “The very essence of this merger is compromise. Each group is going to feel neglected and be resentful. There’s a reason this hasn’t been done before on a large scale” (Puzzanghera, 1997, pp. 1B).

During winter 1997–1998, the amorphous view of the new library took a more distinct shape, and solutions started to be offered for critics’ concerns. Objections to the use of academic books by the public were addressed by proposals such as allowing use only on-site, or limiting the number of items to a small, single-figure number. At the least, the two collections would remain separate, probably classified differently, and most importantly, occupy separate floors, diminishing the issue of young children arriving for story time and loudly running through the university stacks. After several months of closed-door consultation between the city and the university, an early proposal emerged for a six-story building with 475,000 square feet, costing $171 million. Due to the smaller size of the city collection, it would receive less space, 31%, which would

represent an increase from 118,000 to 135,000 square feet, while also freeing the site of the existing main library building for an expansion of the convention center. The university would receive 320,000 square feet (an increase from 313,000 in two separate buildings), and by using compact shelving for 40% of the collection, could hold more items than the equivalent space in the previous buildings. The periodicals and reference collections of the two libraries, which had significant overlap in titles, would be merged. As previously promised, redevelopment money would pay for the new main library, leaving city capital funds for the branches, with an increase in branch operating budgets of $2 million per year (Bartindale, 1998b).

On May 21, 1998, the Council unanimously voted to approve a memorandum of understanding for the project. After fourteen months of work by the two partners, the Council allowed six months to draft a detailed agreement between the city and the university. Caret told the Council, “I really do think together we can be better than the sum of the parts,” while Hammer added, “If we don’t move forward together, the chances for each of us having a new state-of-the-art library of our own are slim” (Bartindale, 1998c, p. 4B).

Over the coming months, the city and the university drafted the Joint Operating Agreement. With the Council having voted, attention shifted to the academic side. When Caret gave his annual address at the beginning of the academic year, several English and history professors handed out leaflets opposing the plan, representing the newly formed Save Our University Library (Suryaraman, 1998). A few days later, on August 31, public presentations were given at a public meeting at the McEnery

Convention Center. Light, Schmidt, and representatives of the Redevelopment Agency presented their case and introduced Anderson Brulé Associates, the San Diego architectural firm which would design the building. An estimated 200 came to see the first display of the proposed design.

The structure as now proposed resembled a layered cake, floor by floor, keeping the public and university levels separated. Now eight floors, the building was deliberately designed with each floor representing a different step in patron usage. The first floor would include the circulation desk and welcome center, and also the children's room (to limit the number of young children on upper floors); reference would be on the second floor; the general (or public) collection on the third; and periodicals on the fourth. Escalators would stop on the fourth floor, necessitating taking the stairway or elevator to ascend to the university collection. The quieter university section would occupy the top half of the building. The very shape of the building emphasized this difference, with the lower four floors on a different axis than the upper floors. To accommodate transportation concerns, a new parking garage would be built across the street from the building, allowing public patrons to park one building away (Bartindale, 1998d; Bartindale, 1998e; Freeman, 2001).

In the November 3, 1998, election, California voters approved Proposition 1A, providing funds for capital construction in the three systems of higher education. If the bond issue had not been approved, the library proposal would have been a dead letter, with the city and university splitting the costs incurred so far. With that unknown removed, planning for the new library accelerated dramatically.

With the bond issue approved, the Academic Senate began debating the joint library proposal. The most controversial question continued to be public access to the university collection. Many academic patrons held public library cards, though the reverse was less common. Reynolds, in a typical statement, said, “An academic library’s main function should be to serve the university. I find it ridiculous that a graduate student would have the same borrowing privileges as an undergraduate, let alone every city resident” (Bartindale, 1998f, p. 22A). In addition to the risk of an item being unavailable, the risk of loss and vandalism needed to be addressed, especially as academic items are often more difficult to replace. In response, the city produced evidence that it was able to retrieve materials that were overdue (Freeman, 2001).

On December 7, after three and a half hours of debate, the Academic Senate voted to endorse the joint library proposal. Amendments to restrict public borrowing or phase it in were rejected. Caret proclaimed, “There are university libraries all over the country that are open to the public and allow the public to come in.” A committee worked out a proposal by which material could be kept out of public circulation, comparable to a book being for library use only, but only in exceptional cases, such as a new bestseller which was in high demand (Bartindale, 1998g, p. 4B). Schmidt proclaimed, “[T]he margin of approval was strong enough so that faculty who were outspoken opponents of the plan will now wait and see whether their fears are realized” (Eberhardt, 1999, p. 21).

With the endorsement of the Academic Senate on the university side, the Council voted on December 17, by a ten-to-one vote, to approve the project. Hammer, a few weeks from leaving office, proclaimed, “The valley is recognized around the world for its

innovation and this is a great opportunity for the city and university to share resources." For patrons, both collections would be open, while each institution would maintain its own manager, budget, and employees, and would jointly operate certain service desks and technical services (Cronk, 1998, p. 1A).

With these concerns addressed, the next step was the Board of Trustees, and then the Legislature. Despite the fiscal contribution from the Redevelopment Agency, the university would soon encounter a major stumbling block from the Legislative Analyst's Office.

On February 16, 1999, Legislative Analyst Elizabeth Hill recommended to the Legislature that the joint library project be cancelled. Although the state was receiving more money that anticipated due to the technology boom, Hill cautioned that this may be a short-term windfall, and recommended in any case that it instead be placed in reserve. To opponents of the project, the report vindicated their position (Guernsey, 1999a; Guernsey, 1999b). As Reynolds said, "That's what we've been saying all along: that there is no need to spend that kind of money on the library" (Jordan & Bartindale, 1999, p. 1B).

Prepared for Hill by the office's Paul Guyer, the report stated,

> We recommend deletion of this $70 million request for working drawings and construction of a new library on the San Jose campus because the campus has a sufficient amount of library space and because of questions that need to be addressed concerning ownership and operations of a library that will be owned as tenants-in-common with the City of San Jose.

(Delete Item 6610-302-0574 [10] for $69,638,000, with a future saving of $33 million.)

The budget proposes $70 million for working drawings and construction of a library to be jointly developed, owned, and operated by the state and the Redevelopment Agency of the City of San Jose. The city and San Jose State University have signed a memorandum of understanding (MOU) for this project that, among other things, provides that the state will budget up to $101 million for the project and the city will contribute $70 million. According to CSU, the commitment of $101 million consists of: the $70 million in the budget; $16 million in additional higher education bond funds, of which $8 million is for equipment and $8 million is for an undesignated purpose; $5 million from the campus support budget for an undesignated purpose; and $10 million in donor funds. In addition, the CSU estimates that another $11.5 million will be required to alter one of the existing campus libraries upon completion of the new library. Thus, the estimated total state cost for this project is $102.5 million.

The library is proposed to be constructed on the campus on state-owned land that is now occupied by three buildings, Walquist [*sic*] North, South, and Central. These buildings, totaling 317,000 gsf, will need to be demolished in order to construct the new library. The MOU provides that the state will convey the land to the city and state as tenants-in-common

and that ownership of the library building will likewise rest in the parties as tenants-in-common. The building is proposed to have 465,000 gsf (325,000 asf), of which 227,000 asf will be allocated to the university and 98,000 asf to the city.

New Library Not Needed and Is Too Costly

Existing Amount of Library Space Is Sufficient. The current campus library function at San Jose is located in two buildings, Clark Library and Walquist [*sic*] North Library (which will be demolished if the joint library is constructed). Wahlquist North was constructed in 1961 and renovated in 1993 at a cost of $3.6 million. Construction of Clark Library was completed in 1982. These two libraries have a combined total of 199,000 asf. The combined libraries were designed to accommodate an enrollment of 20,200 FTE, which compares to a current enrollment of less than 20,000 FTE. Consequently, the existing amount of library space should be sufficient for the campus enrollment and the campus has not substantiated the need for any additional library space.

Proposed Additional Space Is Costly. The net result of the state's $91 million investment (not including renovation of the existing library) in the new library would be an increase of 28,000 asf—a cost of $3,250 per asf of additional space. Using the CSU cost guidelines for library construction, a 28,000 asf addition would cost $6.2 million. Furthermore, in addition to spending $91 million for this purpose, the state would lose

(1) about 96,000 gsf of space in Walquist [*sic*] South and Central because of demolition and (2) clear title to the land underlying the joint library site.

Joint Library Project Poses Operational and Ownership Questions

There are important operational and ownership questions raised by this proposal that CSU and the campus have not addressed. These are:

- The state's authority to spend state bond funds to construct a building in which the state will have only a tenant-in-common interest needs to be determined.
- The proposed library will utilize the campus' utility distribution systems but the MOU commits the city to pay only the cost of utilities delivered, without contribution to the development or maintenance cost of the campus' utilities system.
- Management responsibility for the planning, design, and construction process for the library is assigned by the MOU to the city, raising a question about the state's ability to monitor the expenditure of state funds and exert appropriate oversight authority.
- The Legislature needs to better understand the mechanism that could or would be used to unwind the tenant-in-common relationship if in the future the city and state should disagree on operational or cost matters.

According to CSU, there are few joint library projects in the United States and almost all involve one public entity contracting with another to operate the library. This is a much less problematic arrangement because the library building and land are owned by one entity and the other entity simply contracts for space and operating personnel. Such an arrangement can easily be disentangled if cost and operational disagreements arise. This proposal, on the other hand, is significantly more complex because of the tenants-in-common relationship that would be established between the city and state. We are aware of no such joint library arrangement in the U.S., and we believe the Legislature should consider the risks this may pose in the event of future disagreements between the parties.

Summary

The CSU has not justified the need to construct a new library on the San Jose campus. Moreover, the proposal in the budget is both too costly and raises questions over ownership and operation of a library owned as tenants-in-common with the city. Consequently, we recommend that the Legislature delete the $70 million request for a new library on the San Jose campus. (Delete Item 6610-302-0574 [10], for $69,638,000, with a future savings of $32.5 million.) (*LAO Analysis of the 1999–00 Budget Capital Outlay Issue-by-Issue TOC, 1999*)

The report's conclusion that the library did not require additional space depended upon standards for space that were decades old. In addition, the space figures did not take into account the use of compact shelving, which allows storing 40% more items in the same number of square feet. (Compact shelving is, however, twice as heavy as conventional shelving, and the floors of the existing buildings could not support the additional weight.) The report also did not consider the difficulty of rewiring the existing buildings for computer use (Book Value, 1999).

On April 14, the Senate Budget Subcommittee met to consider the proposal. Guyer, speaking on behalf of the office, stated, "We have serious concerns about the ownership and operation structure…most particularly about how this arrangement might be resolved if parties were to disagree sometime down the line. There are no demarcations of who owns what. We know of no such arrangement existing in the U.S." Caret rebutted that the detailed Joint Operating Agreement was a protection against future disagreements. Subcommittee Chair Jack O'Connell said, "[T]he fact that this has never been done before is not a deterrent" (Ostrom, 1999, p. 6B).

On page E73 of the governor's 1999–2000 budget proposal were these words:

06.87.107 Joint Library

This project is a joint project with the City of San Jose. The project will

> build a new library (330,800 asf, 474,500 gsf). The City of San Jose will joint fund it as a public library.

$69,638. (*Governor's Budget, 1999–2000*, 1999, p. E73)

That last number omitted the final three digits. At the end of June, the Legislature approved the multimillion dollar budget. With those words, and the prior commitment of the city of San Jose and the Redevelopment Agency, the joint library project was underway.

Chapter 5

THE KING LIBRARY

With the California State Legislature's approval, the staff of the libraries could proceed with planning for the new joint library. Early planning for this stage had already begun, going back to the drafting of the Joint Operating Agreement in December 1998, after voter approval of the bond issue. This laid out the broad framework of how the new library would operate on a day-to-day basis, as well as how to achieve the transition of merging two distinct and different organizations. Working with consultants, library personnel identified the tasks that they would need to perform in the new library—3,261 different duties needed to be assigned (Kauppila & Russell, 2003). More than 200 specific policies needed to be rewritten due to the merger (Woods, 2004). Once the library had been constructed, which would require three years, and had opened, experience in the library would necessitate a modification of these policies and procedures.

As has been previously seen, joint libraries must decide whether one partner or the other will administer the facility, or if two managers will concurrently manage the institution. In the case of San Jose, public and university librarians would co-manage the organization. Most units would also have co-managers, although a few would remain separate. The oft-repeated mantra was "seamless service," meaning that the average patron should see no distinction between the two libraries. Five separate teams—Administrative Services, Collection Management/Technical Services, Online Systems

and Technology, Policies and Procedures, and User Services—were organized to work out the many details of the new merged library, and these results were in turn passed to a sixth Core Team (Kauppila, Belanger, & Rosenblum, 2006; Kauppila & Russell, 2003). They needed to determine how to organize two institutions with 225 public and 84 university employees, within the bounds of the Joint Operating Agreement, applicable city ordinances and state laws, and the four different union contracts (Breivik, Budd, & Woods, 2005).

While some units were kept separate, four merged units—Academic Services (for reference), Access Services (for circulation), Information Technology, and Technical Services—were established (Breivik, Budd, & Woods, 2005). Information Technology was especially difficult to merge, due to the countless differences between the two libraries' technological systems (Woods, 2004). Certain other units would remain separate. The children's room clearly could remain under the public library, while interlibrary loan, used more frequently for university users, as well as Special Collections and Archives, would remain university units. In a few cases, full merger was not desirable. The two institutions had long accepted that the two collections would remain separate and that different classification systems—the Dewey system for the public collection, and the Library of Congress system for the academic collection—would remain. (Because the periodicals and reference collections were merged, to avoid paying for duplications, each of those sections used the Library of Congress system, necessitating reclassifying public items.)

A frequently mentioned proposal was to separate the reference desks and their staffs, leading to one of the most divisive questions of the merger. Many university faculty, and several librarians from each institution, believed that public and academic reference services tend to be different, and that a librarian from one institution would be ill-suited to provide reference service at another. After lengthy debate, and a resolution from the Academic Senate urging continued separation, the team responsible for designing reference service hired Thomas Childers, Professor of Information Science and Technology at Drexel University, to conduct a study of the subject. Childers arranged for librarians from each institution to shadow at the other, and also for surveys to be taken of the kinds of questions asked, and by what kind of patron—grouped according to the librarians' perception as general adult, k-12 student, undergraduate student, graduate student, or faculty/professionals/experts. Childers concluded,

> On the whole, academic and public reference librarians reported more similarities than differences in their shadowing reports. Reference processes and interactions were perceived to be largely similar, patron groups overlapped, many resources were common to both, and librarian attitude to patrons was complemented by both sides. Some differences were perceived, namely that public librarians were more likely to deliver information requested with little or no instruction and academic librarians were more likely to instruct, guide and direct rather than deliver information. Another strong difference centered on the work environment, with public librarians shouldering a heavier clerical and

> technical assistance burden at the reference desk than academic librarians. (*Recommendations for Reference Services Design and Delivery*, 1999, pp. 4–5)

Planners decided to established tiered reference, with a first floor information desk for elementary directional questions, and a second floor reference desk staffed by one public and one academic librarian, along with one other person, at least paraprofessional, for what was called "first-level triage" (such as directional and technical questions). The ready reference collection would be located nearby (Conaway, 2000; *Recommendations for Reference Services Design and Delivery*, 1999).

Another important question was during what days and hours, both during a week and over a year, the library would be open to the public. Public and academic libraries tend to have different hours, and public libraries do not need to adjust their hours over the year, as do academic libraries. In addition, many academic librarians have lengthy breaks, as do teaching faculty, while a public library position tends to be year-round. Planners also needed to consider the different hours of peak usage during the day. At a commuter school such as San Jose State, use is greatest during the day, while the public library is busiest during the early evening hours. Due to the university library's location on campus, use was heavier, at 5,400 per day on average, as opposed to 1,700 for the main public library (Kauppila & Russell, 2003).

The difference in days and hours was only the beginning of difficulties with personnel. An early decision was that performance evaluations and salary schedules would remain separate. Performance evaluations would be made by a manager from

within the same institution, and confidentiality rules were established for them. Public librarians are governed through the city's civil-service system, with no special review for retention and no tenure; while academic librarians are considered to be faculty, with different rules for retention, tenure, and promotion. Public librarians are recruited largely from within the Bay Area, while academic librarians often need to relocate to their new positions. Many additional differences needed to be accommodated. City information technology staff, was example, were hourly and eligible for overtime, while university staff were salaried and exempt. Different salary rates for public staff, reflecting the high cost of living in the Santa Clara Valley, and the university staff also created difficulties, when university employees discovered they were paid significantly less. Even the distribution of parking benefits needed to be determined; city staff were eligible to park in the city garage, university staff were not (Breivik, Budd, & Woods, 2005).

Just as the issue of the availability of books was a controversy during earlier planning, the availability of computers for public and academic patrons also needed to be considered. The possibility of a public patron using a computer for video poker when it was needed by a student for research led to the initial proposal for time limits on computers, but that in turn raised the question of how long such a limit such should be, for academic research can be time-intensive. Although the library would have hundreds of computers, its 4,000 desks would be equipped for Internet connectivity for patrons with laptops. (A laptop checkout room was later added.) This would tend to draw students away from the computers and toward the wired desks (Kauppila & Russell, 2003; Mullins, 2000; Woods, 2004).

Patron records were maintained separately, and each library retained its borrower policies, such as number of items and loan periods. Self-check machines were installed, and a call center was established for paging of materials by telephone for those without Internet access (Woods, 2004). The two libraries used different vendors for their computer systems, and planners decided to use the public library's vendor. Then, the data from the university's system needed to be migrated to the public vendor's system. In addition, the two libraries had different Internet providers. The public library's system was more rudimentary than the university's, necessitating a major upgrade to it, although the separate providers were retained. Library staff also faced myriad cases of incompatible software and separate e-mail systems (Woods, 2004).

The two libraries also merged their website. After extensive study, a unified website was devised with a single name, with the tagline "A collaboration of San Jose Public Libraries and San Jose State University Library," with a rotating logo. Features included those most applicable to a public setting, such as the Kids and Teens pages, and those for academic usage. A new catalog was established, replacing the incompatible existing catalog systems, but the listing of databases was maintained separately, both due to the dissimilarities of the titles—at the time of opening, the public library subscribed to 33 databases, and the university to 189—and vendor agreements. All databases could be accessed by any patron within the building, but only university users would have remote access (Kauppila, Belanger, & Rosenblum, 2006; Woods, 2004).

While this took place among the library staffs, in public the San Jose City Council and university needed to decide what the new facility would be named. The two

university library buildings were named after former university presidents, while the public library had been renamed after Martin Luther King, Jr., in 1990. The Council unanimously voted to endorse the use of the King name on the new library, and the university decided to follow suit. California State University policy provides that only one building within the system can be named after the same individual, and a building on the Los Angeles campus was already named after King, but the Board of Trustees voted to waive the policy. The King name would follow the public library's move (Levey, 2000; Library Named for MLK, 2000).

The two institutions then faced the enormous task of moving. The university needed to remove all materials, equipment, and staff from the Wahlquist complex to clear the way for demolition, store the items for three years, then move both the Wahlquist and Clark collections to the new library once construction had been completed. The public library needed to move into the new structure in mid-2003. Nor-Cal Moving Services was hired to carry 25 truckloads per day, five days a week, for three and a half months. The movers used 9,000 carts, 4,325 packing boxes, and 3,000 feet of bubble wrap to move the collection from both the main library and the university's storage facility on Senter Road, with all items to be placed in their correct position on the new library's shelves. The move alone cost a million dollars, took two years to plan, and unfolded from an intricate 65-page spreadsheet, dictating the exact hour each item would depart and arrive. In addition, the city needed to reclassify periodicals and reference items into the Library of Congress system (Zapler, 2003b). On June 30, 2003, the lights went out for the last time at the old main library. Jeanne LoFranco, the only employee to work at

the building for the entire 33 years, had the honor of being the last to leave that evening. The new library would open a month later (Zapler, 2003a).

All these efforts took time and patience, but in the early months of 2003, the King Library approached completion. As summer 2003 neared its end, and San Jose State University prepared for the beginning of a new school year, a new presence was taking shape on the northwest edge of the campus. Town and gown were joining.

CONCLUSION

On the morning of August 1, 2003, hundreds lined up outside the new library for its 9 A.M. opening. By the time the building closed that evening, the gate count had registered 11,998 visitors, and that was on a Friday, during abbreviated summer hours (Albanese, 2003). "It's 100 percent better than our old library," said one student, expressing a widely held view (Kim, 2003, p. A18).

When the formal grand opening was held on August 16, thousands more turned out. The grand opening celebration featured a marathon Read-Aloud Challenge, as six alternating patrons and librarians set a new world record for the longest period of continuous reading aloud—74 hours, 49 minutes, 37 seconds—with no pause longer than 30 seconds. In recognition of the new library's namesake, the marathon concluded with Martin Luther King's "I Have a Dream" speech (Eberhardt, 2003; Egelko, 2003).

Soon, an average of more than 12,000 people per day were entering the downtown library. By December, several months earlier than expected, the library received its millionth visitor. Indeed, usage was so much higher than expected that money needed to be diverted to additional custodial and maintenance services (Berry, 2004).

The San Jose joint library came about due to a combination of geographic, economic, and political reasons. They may not be applicable at another place or time. The most obvious reason for the joint library was simple geography, for the buildings were separated by only four blocks. From that starting point, one development led to the next; if they are nearby, why not locate new buildings next to each other? If they are next

to each other, why not share a building to reduce costs? If they share a building, why continue to duplicate functions such as information technology and technical services?

A second consideration was the unique redevelopment of downtown San Jose. Although many cities have attempted redevelopment since the Second World War, San Jose has done so to a far greater extent than most other cities. That must be attributed to Frank Taylor of the Redevelopment Agency, to the happenstance that the technology boom made Silicon Valley flush with cash, and that the agency was able to lure high technology firms to the Rio de los Esteros neighborhood north of downtown. If San Jose State were located in the suburbs and not in the center of the city, the library project would not have been possible. San Jose also benefitted from being a second-tier teaching campus in the California State University system. As has been seen, joint libraries are most commonly combined school-public libraries, and then, to a lesser extent, joint public-junior college libraries. A research institution such as a University of California campus would have been less receptive to a merger, even if the same geographic circumstances applied.

Economic and political reasons also contributed. San Jose State was perceived as being a campus that had seen better days, and its older infrastructure and relatively low, localized enrollment made it less likely to attract capital money from the California State University system. Several other campuses in the California State University have constructed new libraries in recent years, but San Jose's is an outlier, not only in its joint structure, but in its size. This is the direct result of being able to attract first the money from the Redevelopment Agency, and second from the system, a direct result of the

former. The California State University would not have been willing to provide so much money without the agency's contribution.

From the point of view of the city of San Jose, it was increasingly difficult to explain why a large, affluent city, built on the high technology industry, and dependent on affluent, highly educated workers, had such a poor main library. Even taking into account the superior condition of the branches, and that the branches had an especially high percentage of the public system's transactions, the city was embarrassingly far behind other major cities in the United States in the quality of its library. Similarly, as downtown was redeveloped, the public library was a conspicuous exception to the shiny new buildings found all across downtown. In addition, San Jose wanted to attract large conventions to the McEnery Convention Center, which was not possible with the library occupying the only available expansion space.

Most of the critics of the project have been largely silent since the building opened in 2003. The deliberate separation of the lower and upper floors has succeeded in keeping most public patrons on the lower floors, leaving the upper floors available for quiet academic study. The possibility of academic books being left unavailable for use due to public patrons has not been a serious concern.

Some issues, however, remain. The different hours of the two kinds of libraries continue to cause controversy. Many public patrons dislike the early closing of the library during the winter and summer breaks, when the university is attempting to conserve money for the semester. During the semester, the building stays open later for study hours, with security guards making certain that public patrons have left. Students

may use the collections and computers, but no services are available, in another of the many compromises made to merge the two institutions.

Another continuing controversy within the library pertains to the very different salary scales. City salaries are set by the San Jose City Council, and reflect San Jose's high cost of living. University salaries are set by the Board of Trustees from the state budget, and while some adjustment is made for the location, the salaries do not fully reflect that San Jose is more expensive than most of the rest of the state. This complicates recruitment and retention of university staff. Some librarians also dislike the kinds of reference questions asked by public patrons.

Regarding the library building, both the city and university received a tremendous bargain, for no building of such size or complexity could have been built if the two libraries had worked separately. Both the ability to access Redevelopment Agency and state capital money, as well as the savings achieved by pooling resources, allowed a far larger building to be constructed.

When the library was first proposed, critics noted that such a project had not been tried elsewhere on a comparable scale, and they were correct. While a few large joint public-university libraries exist in Europe, and a smaller number of institutions, much smaller than San Jose State, use them in the United States, San Jose's experience is an aberration. Both the city and the university have gone through a series of library buildings over many years. Some of those lasted for a few years, others for decades. Nobody, only a few years before Mayor Susan Hammer's 1997 announcement, would have predicted that the two would come together in a joint library, or that they would

share the largest library building west of the Mississippi River. Many challenges were faced, and innovative solutions needed to be devised.

Every day, thousands of people walk through the doors of the King Library, either from the public entrance on the north or the university entrance on the south. Some head for the public floors, others upstairs to the research collection. For decades into the future, the King Library will sit on the corner of Fourth and San Fernando Streets, where consecutive libraries have been located for more than a century, as a lasting monument to what both happenstance and visionary leadership can achieve.

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