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Q u a r t e r l y

OREGON LIBRARY PARTNERSHIPS

part • ner • ship *n.* the state
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participation, association;
joint interest

Future beneficia-
ries of Multhomah
County library's
Homework Helper
program—funded in
part by Wells Fargo

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OLA QUARTERLY

Oregon Library Partnerships

I accepted the task of editing this issue of the *OLA Quarterly* because Oregon library partnerships have been a special interest of mine from the first day I lived in Oregon. Literally. Arriving in my new home state one course shy of my MLS, I had made arrangements with my advisor to spend the summer working on an independent study to finish up my degree. My topic? "Oregon and the Challenge of Library Cooperation." What better way, I thought, to learn about the library landscape where I planned to spend my career? A few days ago I went on an excavation into the back of my closet and found that paper. It confirmed my recollection that library partnerships were already an important feature of Oregon library service more than two decades ago. Now, on the cusp of a new millennium with access to transforming technologies, those library partnerships are proliferating and thriving more vibrantly than ever before.

The articles in this issue showcase a mere sampling of library partnerships in Oregon. They illustrate projects that take advantage of cooperation and economies of scale to provide better library services to Oregonians. One describes WCCLS, a cooperative venture that's been around for a long time. Others describe new regional partnerships, one in Southern Oregon that has just begun and another in Eastern Oregon that is still on the horizon. Several articles describe projects that involve a great many libraries like ORULS, the Statewide Database Licensing Project, and the Pony Express Courier. Others describe outreach into the K-12 schools and the business community. Orbis and PORTALS are two partnerships that were formed to take special advantage of new library technologies that support collaboration.

Partnerships succeed because the people who create them are interested in cooperation and have learned to trust each other. That's the common thread that runs through these articles. Oregonians are self-reliant, but they are also pragmatic. When it's clear that cooperation improves service, Oregon's library community turns to partnerships again and again.

Lynn Chmelir,
Linfield College Libraries
Guest Editor

www.open.org/ola

O rbis, now a consortium of 14 four year college and university libraries in Oregon and Washington, was born when the Meyer Memorial Trust awarded the University of Oregon Library a grant of $259,000 to develop a union catalog for five Oregon University System institutions in August 1993. Those original five—the University of Oregon, Eastern Oregon University, Southern Oregon University, Western Oregon University, and the Oregon Institute of Technology—were soon joined by Linfield College and Willamette University. By the end of 1995 the University of Portland, Lewis and Clark College, George Fox University, Reed College and Whitman College were members. Oregon State University requested membership in 1996 and the University of Puget Sound in 1997. Although membership spans two states, currently the greatest distance between two Orbis libraries is within Oregon—between Eastern Oregon in La Grande and Southern Oregon in Ashland. Over 70 percent of the students in Oregon's four-year institutions are part of the Orbis consortium.

ORBIS:
Grassroots Academic Partnership

Sue A. Burkholder,
Library Director,
Southern Oregon University

From the first, Orbis embodied several principles that still characterize the organization. Primary among these are the public-private nature of the organization, its grassroots approach to projects, and the equality of each partner. Each library contributes to the enterprise in a variety of ways—in staff time given to projects, in paying an equitable share of the initial and ongoing costs, and in contributing a number of unique titles to the catalog itself. Orbis has a very small staff, with the first person hired in July 1994 and the second in December 1996. This means that librarians and other staff from member libraries contribute significant time to administrative tasks, committee service, project implementation such as the catalog and circulation, and organizational leadership, particularly in the Orbis Council, the governing body. The University of Oregon has housed the project from its inception and has freely contributed sizable staff time, making possible a good deal of its success. Pragmatism, too, has characterized the consortium, in such areas as the projects it has implemented, issues of management and governance, and its relationship with PORTALS and other organizations.

During the past five years Orbis members have undertaken several successful projects that exemplify these qualities and that have helped member libraries better serve their students and faculty.

Union Catalog. The catalog, the first successful Orbis project, came up for public use on March 8, 1995, merging the records of seven libraries. It was, and remains, the core activity of the consortium, central to Orbis membership. By October 1, 1998, the union catalog comprised records from 13 members and included 2,331,641 unique bibliographic records. Of these about 73 percent were held by a single institution, 90 percent were in the collections of three or fewer libraries, and less than one quarter of 1 percent were owned by 10 or more libraries. A web version of the catalog made its public appearance in May 1996. The Orbis catalog is available to other libraries and individuals either through telnet or the web and currently has 12 public ports.

Oregon State University expects to add its records to the catalog in early 1999, shortly after migrating its OPAC to Innovative Interfaces software. For several years OSU and Orbis struggled to find a practical and cost-effective way to integrate a non-Innovative system into Orbis but did not succeed, leaving open the question of how to make membership and full functionality available to libraries with other systems. A second major addition expected during 1998-99 is loading catalog records for holdings of the Center for Research Libraries, which will also participate in Orbis Borrowing. The annual Orbis membership fee for CRL will include access to CRL collections for all 14 Orbis libraries.

Orbis Borrowing. Circulation of books to other libraries through patron initiated requests was a goal of Orbis libraries even before the union catalog was up and running. In August 1994 the Council established an ad hoc committee to prepare a grant request for the Meyer Trust to fund the implementation costs for circulation. In April 1995 Orbis members agreed to the principle of reciprocal on-site borrowing for all students and faculty from each others' libraries, an important step in the private-public partnership of Orbis.

The grant to Meyer Trust was submitted in February 1996 and turned down a few months later. But in May 1996 the 12 Council members voted unanimously to purchase the circulation software plus additional ports for general access and to absorb all staffing costs the new system would require. The implementation costs, which members decided to share equally, totaled $21,250 for each library. Once this decision was made and the money committed, the group decided to move forward as quickly as possible. The Orbis Borrowing Committee was established at that same meeting. Like other Orbis committees the OBC required hours and hours of working meetings both in person and over the Internet.

Decisions relating to patron initiated borrowing, or Orbis Borrowing as it was soon called, tested the cooperative and collegial nature of the consortium since different libraries often had different student and faculty needs and traditions. In the end, and after much

ORBIS

discussion, the Council reached compromises acceptable to everyone. Orbis Borrowing would be limited to students, faculty and staff (all as defined by each institution) and all groups would be treated equally in terms of both borrowing period and fines. Loan periods would be for three weeks with no renewal, although this issue should be revisited once Innovative makes holds and recalls available in its union catalog system. Fines would be steep, $.50 per day for 10 days, then increasing to $1.00 a day with a $20 maximum; service charges would be set at $15 per item; and replacement costs would be fixed at $60 for each book. The borrowing library would assume responsibility for lost and damaged books. Service charges and replacement costs go to the lending library, while fines remain at the borrowing library, a pragmatic decision since some libraries never receive their fine money. The goal was delivery to the borrower's library within 48 hours after a request was made. Orbis Borrowing was opened to students and faculty on March 10, 1997.

Patron initiated borrowing was an instant and resounding success. During the first full fiscal year of operation, July 1997 through June 1998, some 58,800 items were requested and loaned via Orbis, the vast majority within the 48-hour goal. During peak activity about 1,100 courier book bags are in use, being packed, transported, or unpacked. Statistics for 1997-98 (see Table 1) reveal that the University of Oregon was both the largest lender and the largest borrower in the system. The second largest lender was a private institution, Whitman College, and the second largest borrower was also a private college, Lewis and Clark. The five participating libraries from the Oregon University System borrowed a total of 22,061 books, 37.5 percent of all the transactions. The private colleges and universities both borrowed and loaned more books per FTE student than the public institutions.

What impact does Orbis Borrowing have on ILL? Table 2 gives some preliminary figures for three libraries. Both Linfield and Reed showed reductions in both borrowed and loaned returnable items (books) between 1995-96, the last full year before Orbis Borrowing, and 1997-98, its first full year of operation. The University of Oregon, although experiencing a slight decrease in ILL books borrowed, had a slight increase in books loaned. All three libraries showed substantial increases in overall borrowing and lending activity in Orbis Borrowing and ILL combined.

Table 1
Comparisons—Orbis Borrowing, FTE and Holdings
1997-1998

	Loaned Items	Loaned - % of Orbis	Borrowed Items	Borrowed - % of Orbis	FTE - % of Orbis Total	Holdings - % of Items	Unique Records - % of Orbis
Eastern Or U	1,867	3.2%	1,801	3.1%	3.5%	2.7%	3.7%
George Fox	2,097	3.6%	4,353	7.4%	4.4%	2.8%	3.1%
Lewis & Clark	4,111	7.0%	7,144	12.1%	6.5%	7.0%	7.0%
Linfield	2,723	4.6%	6,386	10.9%	4.8%	2.8%	1.6%
OIT	1,149	2.0%	1,510	2.6%	4.3%	1.5%	1.8%
Reed	3,842	6.5%	6,339	10.8%	2.9%	7.1%	5.8%
Southern Or U	5,008	8.5%	5,155	8.8%	9.0%	6.7%	4.2%
U of Oregon	17,388	29.6%	9,569	16.3%	36.0%	39.5%	50.1%
U of Portland	2,858	4.9%	2,232	3.8%	5.7%	3.0%	2.3%
U of Puget Sound	4,876	8.3%	1,898	3.2%	6.4%	9.0%	7.3%
Western Or U	2,370	4.0%	4,026	6.8%	8.3%	4.2%	1.6%
Whitman	6,269	10.7%	2,493	4.2%	3.1%	7.2%	3.6%
Willamette U	4,242	7.2%	5,894	10.0%	5.2%	6.5%	8.0%
Total	**58,800**	**100.0%**	**58,800**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Table 2 ILL Activity Before and After Orbis Borrowing—Books	Borrowed 95-96 ILL	Borrowed 97-98 ILL	Borrowed 97-98 Orbis	95-96 ILL	97-98 ILL	Loaned 97-98 Orbis
Linfield	5,345	772	6,386	2,820	1,025	2,723
Reed	3,426	2,191	6,339	2,347	2,011	3,842
U of Oregon	6,671	6,556	9,569	12,290	13,162	17,388

The numbers for Orbis Borrowing will go up in the future as more students and faculty learn to use this service and as Oregon State University becomes a fully participating member. To attempt to balance the borrowing/lending ratio, Orbis changed the selection of the lending library from a purely random assignment to a formula that puts last year's largest net borrowers at the top. Further improvements will hopefully expand the service to include journal articles; during 1998-99 an Orbis task force will be looking into how this might be accomplished.

Electronic Resources. Orbis members also intended from early in the consortium's life to go beyond providing simply a union catalog and borrowing among libraries. As early as 1993 the Council discussed how to include reference databases and in September 1995 the Reference Database Committee held its first meeting. At that time the concept was to load bibliographic and full-text databases into the Orbis catalog, but as the web emerged as an increasingly more important access vehicle the emphasis shifted to creating a mechanism for purchasing cost-effective web access to a variety of databases.

The February 1997 Council retreat made creation of an electronic resources committee a high priority. The Task Force on Electronic Resources (TFER) with a member from each Orbis library held its first meeting in June and has continued to meet about monthly. Initially TFER expected to issue a report recommending databases Orbis should license as a consortium, but a different approach soon emerged. Since few databases were of interest to all libraries but many services were of interest to some libraries it made sense to emphasize consortial purchases, open to any library desiring a particular database and willing to pay, and allowing any library to decline to participate. Each library would pay for the databases it had selected from its own budget. Individual Task Force members undertook investigation of databases, contacts with vendors, gathering tentative price information, presentation to the group, and follow-up as libraries dropped out of, or into, the group desiring a particular database. With a lot of hard work by TFER members, it accomplished a great deal in a relatively short time.

By fall 1998 TFER had looked at over 100 electronic resources and had arranged consortial purchase for a significant number of them, including Congressional Compass, STAT-USA, Britannica Online, PsycINFO, Cambridge Scientific Abstracts, ComIndex/ComAbstracts, Poem Finder, and FirstSearch among others. To maximize impact and minimize effort, TFER cooperated with a similar committee in PORTALS and with libraries in Washington on the FirstSearch and Britannica Online purchases.

Several issues concerning electronic resource licensing still need attention, from vendor negotiation to the best way to expedite review and renewal processes and how to reduce the amount of time spent by everyone on TFER activities. When appropriate and feasible the group tries to include non-Orbis members in its activities but policy is still emerging in this area. The question of how to allocate costs also continues to vex Orbis, especially since vendors vary so much in their charging algorithms. The guiding principles, that all participating libraries should benefit and that no library should pay more than it would by purchasing individually, have meant that allocation formulas have varied from service to service. The basic allocation formula has an across the board figure plus a weighted amount based on student FTE and materials budget. Orbis has also begun playing a role as fiscal agent for Oregon statewide licenses, raising the question of how it should recover costs for services to non-Orbis libraries.

Orbis is still very much a work-in-progress. It has been successful because of the shared vision of the participants, the emphasis on achievable goals exemplified by Orbis Borrowing and TFER activities, and every library's willingness to contribute both money and staff to the organization's work. But it is not a static organization. It will continue to change as new opportunities arise, as technology develops, as new activities are undertaken, and as membership issues are solved. The next several years should prove to be an exciting time for this grassroots academic partnership. **Q**

Orbis can be found on the web: Union Catalog http://orbis.uoregon.edu

Homepage is at http://libweb.uoregon.edu/orbis/

Cooperative Is Our Middle Name:

Why the Washington County Cooperative Library Services Works

by Eva Calcagno
Cooperative Library Services Manager

Formed 24 years ago to provide free public library service to the unincorporated areas and the rurally isolated residents of Washington County, the Cooperative Library Services approaches the end of the millennium as a strong federation of jurisdictions. The Cooperative has become a strong suburban library system providing quality service to 390,000 people in Oregon's second most populated county.

All public, academic, special, and high school libraries within the county are considered members of the Cooperative. This includes 10 public libraries managed by cities: Banks, Beaverton, Cornelius, Forest Grove, Hillsboro's Shute Park, Tanasbourne, Books By Rail branches, Sherwood, Tigard and Tualatin. In addition, non-profit associations manage two public libraries, Cedar Mill and Garden Home Community Libraries. The County manages one service outlet, the West Slope Community Library. All of the public libraries plus the Oregon College of Art & Craft and the Tuality Health Information Resource Center share an integrated library system, called WILInet, that includes a shared catalog, access to commercial databases, and Internet services.

The other academic, school and special libraries in the County make use of the Cooperative's Second-level Reference, Interlibrary Loan and Courier services. The Cooperative's ILL staff will post OCLC interlibrary loan requests for them, as well as borrow or photocopy materials from Multnomah County or Portland State University on their behalf. The libraries may electronically reserve materials on WILInet and the Courier program will deliver items to the libraries by van or by mail, depending upon the volume of deliveries.

WHAT DOES THE COOPERATIVE DO?

Washington County's strategic planning document, *County 2000*, defines the levels of service delivery for the County for all areas including libraries, land use, and public safety. The County identified direct public library service as a local responsibility to be performed by a city or non-profit organization contracting with the county. The County performs three functions: serving as the primary funding source for public library service, providing centralized support services to contracting libraries, and providing direct service to special populations.

Primary funding source: The majority of the Cooperative's budget is used to pay contracting public libraries for providing free service to all residents. In FY1998-99 contract payments will total over $8.2 million, or about 80 percent of the money spent on library service in the county.

Central support services: The Cooperative provides an automated system, MARC cataloging and authority control of the central database, Internet access, and subscriptions to electronic databases for member libraries. We maintain a second level Reference and Interlibrary Loan Program, countywide Telephone Reference Service through Beaverton City Library, seven-day per week intra-library Courier delivery, centralized Youth Services support, and publications and publicity for countywide promotions. In addition, the professional staff of the Cooperative provides consulting to libraries and organizes continuing education opportunities on various topics for library staff. We have a formalized process through which developing, volunteer-based libraries are mentored in preparation for full membership in the Cooperative.

Direct service: The Cooperative has managed one service outlet, the West Slope Community Library, since 1979. While the operation of a public library is not identified in *County 2000*, we will continue to support West Slope until Beaverton, the nearest city, annexes the service area. Our Outreach Program provides direct, personalized service to about 600 homebound patrons, providing readers' advisory service and mail delivery of library materials to patrons and offering rotating collections of materials for residential care facilities across the county. Outreach also coordinates mail delivery of loans to school, academic, and special libraries, and supports Library Express, a service through which patrons can have reserves mailed to their homes for a delivery fee. The Cooperative has recently initiated experimental programs to serve non-English speaking residents (primarily Spanish at this time), outreach to the daycare community, and is contracting with Hillsboro to operate an Inmate Library in the new Washington County Jail. Our intent with experimental services is to explore needs and establish service plans so that service may eventually be assumed by local jurisdictions. The Cooperative will spend approximately $2.8 million on Central Support and Direct Services in FY1998-99.

Countywide, the public libraries enjoy a fairly high level of funding. About 80 percent of the money spent on public library service countywide comes from the Cooperative's budget; the remainder is from local jurisdictions and fundraising. The percentage of the local library's budget that comes from other sources varies from 0 to 63 percent. In FY1997-98 the county and the cities will spend over $12,000,000 on public library service.

The Cooperative Library Advisory Board is made up of representatives of contracting public libraries,

plus a representative for the West Slope community. For the cities this is usually a city councilor or manager, mayor, or staff person. Because these people representing different jurisdictions need to also work together on other issues like land use or public safety, they tend to try to cooperate. They know that harmony with the neighbors goes a long way to future support in other arenas. Another strong reason to cooperate is that if a board comprising eight cities and two non-profit organizations can reach agreement on an issue, the recommendation holds considerable weight with the County Board of Commissioners.

WHAT DO MEMBER LIBRARIES DO?

Member libraries set their own lending policies, determine fee structures, staffing levels, hours of service, collection focus, children's and adult programming levels, etc. Cooperative members have access to the resources and expertise of each other and realize that the whole is greater than the sum of the parts. Members that are also WILI libraries have adopted common policies and procedures to establish quality-control standards for the shared database, and to assure that patrons receive similar treatment from one library to another. Their collections tend to complement each other. Unlike branches of a large centralized system, our public library collections tend to have more unique titles and less duplication. Member libraries get the benefits of being in a large system, but still maintain local autonomy. Patrons maintain an identity with their local communities and feel an ownership of the local library because they can provide input to local boards. "We feel a part of, but are still apart from" is how Karen McClendon, Garden Home Community Library Director, describes this relationship.

County residents have traditionally had an aversion to big government. Local determination of decisions and policies is important to member jurisdictions, and voters have responded positively when allowed to choose from a menu of services. Residents of the urban unincorporated areas prefer to choose services rather than assume that a bigger county government will provide all of those services in one package for them.

WHAT IS IT WE DO DIFFERENTLY?

The Cooperative's long-range plan is our blueprint for service. It is drafted by staff and member libraries, refined by committees, adopted by the Library Directors' Board and the Advisory Board. As a group

> "Washington County Cooperative Library Services exists as an agency of county government to coordinate, contract for and/or provide a full range of library and information services to all residents of the county. Libraries in Washington County work together to share resources and information in a spirit of cooperation which goes beyond local boundaries in order to provide excellent countywide library service."
>
> MISSION STATEMENT,
> WASHINGTON COUNTY COOPERATIVE
> LIBRARY SERVICES

we evaluate any new service or program with these questions in mind: Does it support the mission of the Cooperative? Is it best done locally or centrally? Is it more efficient or economical to do centrally? For example, in order to offer second-level reference service, the Reference Program rents space at Multnomah County's Central Library to make use of its vast reference and historical collections. Two years ago the Outreach and Courier programs began renting office and loading dock space at Hillsboro's Tanasbourne branch to have access to a full-service collection to fill loan requests for Outreach patrons and to reduce courier deliveries to and from a large library.

Applying the basic divisions of responsibility from *County 2000* to the planning of library service has built a trusting relationship between the County and cities. Local libraries know what services they can count on the County to provide, and that working together insures the success of all partners. Over the years, the Advisory Board has worked hard to accommodate the needs of individual members, especially small libraries, and this genuine concern for the good of the whole is an important factor in our success. "The Cooperative continues to be successful because there is a trust relationship between the county and cities at all levels—advisory boards, city council and county administration, not just librarians," explains Debra Brodie, Hillsboro Library Director.

Trust takes time to develop. Several years ago Cornelius hired City Manager John Greiner, who came from another state where successful city-county partnerships did not exist. After serving as Chair of the Cooperative Library Advisory Board, his initial skepticism faded when he realized that the "spirit of cooperation" cited in the mission statement was genuine. "Washington County is an anomaly. I've never seen a county that works this well in bringing everyone together; the joint partnership really works. Cooperative—the name really fits what's happening."

NO BOUNDARIES

Not only are residents encouraged to use any library in the county that best meets their needs, residents are also not confined to their own county. Many residents of the Metro-Portland area do not live and work, shop, or dine in the same county. We believe that people tend to use libraries near where they work, shop, or seek entertainment, not necessarily close to home. To respect this, the Cooperative has maintained a long-standing agreement called MIX (Metropolitan Interlibrary Exchange) with Multnomah, Clackamas and Hood River counties, plus the Fort Vancouver Regional Library System and Camas Public Library in Washington, to allow free direct loans to residents of all jurisdictions. Multnomah, Clackamas and Washington counties reimburse each other annually for the net imbalance of loans at the rate of $1.00 per loan, and Washington and Clackamas pay Multnomah an additional $60,000 per year for patron usage of Multnomah's

Statewide Database Licensing the Oregon Way

by Deborah Carver,
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Some changes in library services and processes evolve over the course of several years; others seem to happen overnight. The formation of library consortia is one of those changes that fit the latter description. Just a few years ago many library administrators were probably wondering if productive cooperation, beyond the work of the major utilities, was ever going to happen. Libraries talked endlessly about cooperation, but the fruits of those discussions seemed modest at best. Now, the majority of libraries, particularly academic libraries, belong to one or more consortia. This change has been swift and dramatic. Library consortia are actively seeking ways to extend services, efficiencies, and buying power, and to a large extent, their efforts have been successful.

So what finally happened to break the inertia? There may be more than one theory, but credit has to be given to a few states' leaders and elected officials who thought that pumping more cash into their library systems might actually be a good thing. In some sections of the country, a robust economy seems like a propitious time to re-invest in the social infrastructure. The vision in many of these states was to provide the widest possible access to key electronic resources. Georgia is a good example.

GALILEO is an acronym for Georgia Library Learning Online. The GALILEO project grew out of the University System of Georgia's (USG) effort to "manage costs and the burgeoning application of technology in libraries." (Williams). In August 1994, the new Chancellor of the USG, Dr. Stephen R. Portch, asked his advisory staff to respond to the question, "If you had $20 million, how would you spend it?" Among the proposals he received was a request for $6 million to fund system-wide library services. The proposal was entitled "A Vision for One Statewide Library" and was soon expanded to include a substantial upgrade to Georgia's telecommunications network for education. A chancellor's concern for libraries, a governor's interest in directing state lottery funds to education, and a legislature's willingness to invest in the public sector converged to create GALILEO. Participants and beneficiaries of GALILEO include the state's university system, private colleges, public libraries, and K-12. GALILEO

has many goals, including universal borrowing, but its hallmark is statewide licenses to numerous online databases through the Internet.

Other states have accomplished similar feats. Ohio, North Carolina, Texas, and Minnesota are all worthy examples. In most situations, you will find a significant infusion of cash behind the growth in statewide library cooperation. In Oregon, the path to statewide database access has been different, but the results have been as successful. In 1994 the Oregon State Library convened several discussions among the major stakeholders in the library community to envision a statewide library network. The Oregon Information Highway Project (OIHP) grew out of those important discussions. OIHP had three components: extend Internet connectivity, initiate cooperative database licensing, and develop a statewide interlibrary loan system. Several objectives were listed under cooperative database licensing:

- Determine database needs
- Determine infrastructure needs
- Develop pricing plans
- Undertake competitive procurement
- Negotiate vendor and participant agreements

In 1995, the State Library appointed a representative group from academic, public, and school libraries to complete the above objectives. The group focused on two areas which seemed to have the broadest appeal: the statewide newspaper and general periodical databases. By the group's second meeting, the fundamental challenge became clear: how do you start this process without a central pot of money? You can go to the vendors and ask for bids, but unless they know how many libraries will be accessing the information, their responses will be tentative. You can go to the individual libraries and see if they would be interested in a specific product, but unless they know how much it will cost their responses will be just as tentative. The group started this long and sometimes confusing process with a RFP (request for proposal) for general periodical databases. It was fairly straightforward to compare coverage and content, but it was more difficult to compare costs. Initial bids were unaffordable. In most situations, the vendors were looking at the entire population, and without a substantial subsidy, any cost-sharing model would knock smaller libraries out of the picture immediately. Without their contributions, the costs to the remaining participants would increase. As the costs increased, more libraries would have to drop out. And so on and so on.

So the group, now called that Statewide Database Licensing Group (SDLG), took another strategy. It selected the product that provided the best content, and then it developed a list of likely participants and renegotiated the price with the chosen vendor. The standard "street-price" for an individual library was already known, so the group could easily come up with an acceptable cost that would benefit everyone

L ast March 250 libraries in Oregon and Washington were facing a crisis. The courier service they relied on for daily delivery of ILL requests for the past 15 years was in danger of collapse and very few libraries had any idea that there was a problem. Since the 14 members of the Orbis consortium were among the few libraries that were aware of the troubled state of the Washington/Oregon Ground Courier Service, Orbis found itself somewhat reluctantly in a position of leadership to preserve this important foundation for regional resource sharing.

Orbis Courier Service:

The Resurrection of a Collaborative Success

by John F. Helmer,
Head, Library Systems,
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Although it is too early to say with any certainty, the results of this effort appear to have created both a new era for courier service and a return to the roots and intentions of those visionary librarians that established this service. The story of how library courier service was revitalized provides a lesson in the hazards of abdicating administrative responsibility and may highlight a gap in collaborative structures for libraries in the Northwest. At minimum it demonstrates the remarkable willingness of libraries in Oregon and Washington to recognize shared interests that cross political boundaries, to cooperate, and to take a leap of faith when presented with a crisis.

BACKGROUND

The history of the Washington/Oregon Ground Courier Service or, more commonly, "Pony Express" or just "the Pony" is largely within the memory of a few librarians who had first-hand experience with its creation in the mid-1980s. The earliest version of the courier service began as a demonstration project of the Washington State Library. A contract was awarded for the shipment of library materials between a group of Washington libraries and an ad hoc consortium was created to manage the service. The acronym for this consortium was COWLIC which may have stood for Consortium of Washington Libraries Information Circuit. During this time responsibility for the service was turned over to Crose Consulting, administrator and fiscal agent for the past 15 years. Following Washington's lead, the Oregon statewide cooperative collection development group, appointed by the Oregon State Librarian established service in Oregon. This group no longer exists.

For the past decade and more the Washington/Oregon Ground Courier Service has, on the whole, worked extremely well. Although one can easily find libraries that have never experienced courier service problems and others that have experienced many problems, it is clear that this service has simplified packaging and addressing, provided substantial sav-

ings over other shipping methods, and achieved its ultimate purpose: enhanced resource sharing. Over time it appears that libraries became increasingly distant from the oversight of this service and much of its continued success can be credited to ILL staff at participating libraries, the administrator, Crose Consulting, and service provider, Pony Express. Libraries that use this service were also fortunate that, prior to 1998, no disruptive forces caused either Crose Consulting or Pony Express to alter the essential features of this service.

CRISIS

The first signs of problems appeared in December 1997 when Michael Crose, owner of Crose Consulting, sent letters to libraries in Oregon, Washington, and Idaho explaining that the price for courier service would immediately increase due to a 25 percent price increase imposed by Pony Express. The reasons cited included increases in labor, fuel, and capital equipment costs as well as an increasing volume of materials shipped. The letter apologized for the short notice and indicated that Crose Consulting would be seeking alternative service providers. The price charged to Orbis consortium members, which may be similar to that experienced by other libraries, amounted to an increase of 11-20 percent.

Although concerned by the size of the price increase and lack of prior notice, many libraries were also troubled by the growing realization that courier service was evidently subject to a month-by-month rate determined by Pony Express. Although many libraries accepted the announced higher prices, they also began to think about the future of courier service and to examine its contractual basis. Some libraries discovered that they could not locate their contract for courier service while others discovered that their contract provided only a relatively weak description of service expectations with no price guarantee. The courier service contract had remained in place, unexamined, for many years.

In March 1998 Crose Consulting called a meeting of about a dozen libraries from Oregon and Washington to discuss the future of courier service. During this meeting participants learned that Pony Express continued to be discontent with revenue generated by the Washington/Oregon Ground Courier Service and that rates would need to rise once again. The phase-in of a tiered weight-based rate structure was announced, with the first wave of 10 libraries moving to the new rate system on April 1, 1998. These libraries would experience huge price increases that ranged from 166-440 percent with only 10 days notice.

Surprising as the announced price increases were, perhaps still more disturbing was the revelation that Crose Consulting had no choice but to pass on increases from Pony Express and could not absorb such a price increase for even one month. In short, it was made clear to participants at this meeting that Crose Consulting would go out of business

if libraries were unwilling or unable to pay more immediately and, in any case, might not be willing to continue serving as administrator and fiscal agent. It seemed clear that despite the best efforts of Crose Consulting to secure a reasonable long-term contract with Pony Express, the Washington/Oregon Ground Courier Service was in danger of collapse.

Orbis had representatives at the March meeting with Crose Consulting and news of the announced pricing system spread quickly within the consortium. Although clearly disturbed by the imposition of a second large price increase delivered on short notice, member libraries were also concerned about the long-term viability of courier service. Among the topics discussed was the question of who determines an appropriate model for sharing vendor costs. Oregon has a long tradition of distributing courier costs according to a flat rate. This tradition is based on a philosophy that flat rates encourage resource sharing. Many libraries were disturbed by the notion that a new formula, whether well considered or not, was being imposed on the library community. Libraries that participate in any of the region's consortia are very familiar with the process of negotiating price with a vendor then separately determining how to divide costs among members. Many thought that this was the way courier service should work as well.

WHAT CAN BE DONE?
The main focus of discussion within Orbis centered on how to inform other libraries in the region and how to work together to stabilize courier service. There was also a growing sense of powerlessness in the face of a crisis. There was no courier web site, no courier email list, and no users group to rely on. It seemed clear that collective discussion was called for but libraries using this service lacked the means of communicating and acting collectively.

Given the potential collapse of courier service, Orbis member libraries felt that some collective discussion had to happen very quickly. The initial hope was that some other regional entity might already be organizing a response. Unfortunately, a few calls and email messages to consortia in the region, Crose Consulting, and the state libraries in Oregon and Washington confirmed that not only was no response being organized but that very few libraries knew about the problem. It became clear that, although Orbis was not an obvious group to coordinate the discussion of a service that vastly exceeded its membership, there were no other venues available. Several leaders within the library community encouraged Orbis to facilitate communication on this issue and promised enthusiastic participation.

Orbis sent a questionnaire to existing courier dropsites and used various regional email lists to call a Library Courier Service Stakeholder Meeting. The purpose of the questionnaire was to determine service expectations and to elicit ideas concerning the future of courier service. While preparing for the stakeholders meeting, collecting questionnaire responses, and discussing the situation with colleagues in other library consortia, it became clear that Orbis needed to consider ways to preserve and improve courier service between its member libraries. Orbis decided that a Request for Proposals (RFP) seeking courier service for Orbis member libraries would need to be prepared. At the same time, Orbis member libraries recognized that the strength of courier service is dependent on its widespread use. In the interest of preserving, perhaps even improving that strength, Orbis decided to offer to broaden the scope of its RFP process to include a wider group of libraries if that was of interest to the library community.

THE STAKEHOLDERS MEET
Interest in the Library Courier Service Stakeholder Meeting was very encouraging. About 50 people representing more than thirty dropsites or consortia attended this meeting on April 21 at the Multnomah County Library. At this meeting participants briefly reviewed the recent history of courier service in the region and a clear consensus for quick action emerged. Representatives of Orbis presented questionnaire results and offered to expand its RFP process. There was agreement that an expanded Orbis RFP was probably a good concept to explore and the group considered the specifics of how a courier service hosted by Orbis might be structured.

First, the group discussed and endorsed goals in restructuring the service such as price predictability, appropriate balance of cost and performance, administrative structure that minimizes overhead (staffing, materials, etc.), full disclosure of vendor costs and administrator overhead, maximized participation, improved mechanisms for communicating service problems, and oversight by participating libraries.

Stakeholders next turned to the appropriate approach to achieve the goals and agreed to the concept of having contract administration and fiscal agent duties (RFP, negotiation, billing, etc.) performed by a particular library and/or existing consortium on behalf of all dropsites in the region. The group also endorsed the concept of having oversight of the service accomplished by a users group made up of participating dropsites.

During this meeting participants discussed Orbis' offer to serve as contract administrator and, through the University of Oregon, as fiscal agent for a regional courier service. Orbis was willing to take on such responsibilities in recognition of the critical role courier service plays in library resource sharing in the region, and it could serve as contract administrator as long as the service and other aspects of the contract were consistent with Orbis' objectives. Orbis could fill the critical roles of contract administrator and fiscal agent as well as provide organizational support for user oversight. Orbis agreed to establish a Web site and email list to aid in commu-

nication and to share critical documents related to the RFP process.

Although some stakeholders were understandably concerned about the advisability of relying on a consortium of 14 libraries to administer a service for potentially more than 50 dropsites and 250 libraries, there was a consensus that this looked like the best course of action. Orbis representatives left the Library Courier Service Stakeholder Meeting with an endorsement of their draft plan and an unambiguous mandate to create an RFP that would provide a service open to all libraries in the region.

ORBIS COURIER SERVICE

After the stakeholder meeting, a group of Orbis and University of Oregon staff assembled to create a courier service RFP. The group was enthused by the support demonstrated by libraries but daunted by the prospect of assembling an RFP, going out to bid, evaluating proposals, negotiating a contract, and potentially creating the details of a new service to begin in July 1998.

In creating the RFP, there was a significant effort to understand the current service and to learn about the shipping industry. The RFP would create a courier service much like the existing one. There was not time for the necessary consultation that would be required to institute major changes. In assembling the RFP the group relied heavily on the knowledge of ILL staff, Orbis staff, advice from the UO Business Office and the experiences of a wide variety of consortia across the U.S. They gathered sample RFPs and struggled with the best way to express service expectations and to evaluate responses.

The Orbis courier RFP was advertised in Seattle, Portland, and San Francisco and mailed to more than 30 prospective bidders. In the end, Orbis received only one bid—a proposal from Crose Consulting. Crose Consulting proposed to use Pony Express and agreed to the contract terms set forth in the RFP that included clear service expectations and a fixed price for a year with annual options to renew for a total of five years.

Next, Orbis sought ideas from the library community on how to distribute costs. Libraries would not be able to join the Orbis contract without knowing the price. Price distribution was perhaps the single most controversial subject. Orbis received many well-considered but contradictory ideas about what might constitute a fair formula: e.g., "high-volume users should pay more" and "net lenders (who are often high-volume users) should not be penalized for lending." There was general agreement that libraries did not want continually to weigh and count items in shipments nor were they in favor of periodic sampling to estimate volume.

Several pricing models were shared with libraries via the courier email list. The first model was based on a flat fee, the second was based on a division of libraries into two price tiers, and the third offered a weighted distribution. The latter was an attempt to incorporate a number of potentially important factors by taking into consideration type and size of library, type of service (ILL vs. patron-initiated borrowing systems), and number of libraries served by a single dropsite. After lively discussion, on and off the list, it was decided that each dropsite would pay a flat fee.

On July 17, 1998 the Orbis Courier Service was announced as a membership organization with annual billing based on an equal division of vendor costs plus a small Orbis administrative fee. The service would be maintained without disruption and dropsites could individually choose to join the Orbis Courier Service or, as before, contract directly with Crose Consulting. In a short time Orbis enrolled 32 of the 57 dropsites serving 164 of a total 250 libraries. Each dropsite will pay a little over $300 per month, a favorable outcome when compared to previously announced increases ranging as high as $700 to $1,000.

NEXT STEPS

Several tasks remain, including establishing the process of user oversight and planning for the future. These issues and others remain to be discussed by the library community.

Orbis invites such discussion and encourages input on all levels. Significant founding documents as well as those documents that describe the Orbis Courier Service are available at http://libweb.uoregon.edu/orbis/courier/ and there is an Orbis Courier Service email list available at <courier@lists.uoregon.edu>. All libraries served by the Pony Express courier service, whether contracting with Crose Consulting or Orbis, are eligible to participate on this list. Subscription requests and other questions or comments can be sent to orbis@oregon.uoregon.edu.

FINAL THOUGHTS

Library courier service has a long and complex history in the Northwest. Various organizations including the state libraries of Washington and Oregon, Crose Consulting, Pony Express, and Orbis have all worked to provide an efficiently managed low cost service that encourages resource sharing in the region. The new Orbis Courier Service, with its goal of user oversight, represents, in many respects, a return to the original intentions of COWLIC. The evolution of this service demonstrates the hazards that libraries invite when they abdicate oversight responsibility for collective activities.

What will the future hold? Libraries in the Northwest will probably continue to look for appropriate hosts or venues for collaborative projects. While many other states and regions discuss how to further aggregate their influence into "mega-consortia," the Northwest continues to be a large but sparsely populated area that lacks a collective structure to

Multnomah County Library Connects with Kids

by Kate Houston,
School Corps Librarian,
Multnomah County Library

SCHOOL CORPS: PUBLIC LIBRARY PARTNERSHIP WITH K-12 SCHOOLS

The Multnomah County Library School Corps is an innovative outreach program that connects students and teachers with the critical information resources of the public library. Established in August 1997, it is the first of its kind in the nation in which library professionals are exclusively designated/assigned to promote public library resources in schools.

The goal of the School Corps is to increase information literacy of K-12 students in Multnomah County's nine school districts by working in partnership with local public and private schools. It aims to complement, not replace, media specialists. School Corps' public library service education continues to emphasize the necessity of media specialists in schools.

Five professional librarians work to support curriculum and increase student and faculty awareness and use of electronic information resources available through the public library. By working in cooperation with teachers, media specialists, and school library staff, the School Corps creates materials and services to assist students in the efficient and effective use of public library resources.

School Corps services include library card promotions and training in the Library's technology resources, including the Library's computer catalog, text-based Magazines Online and web-based SearchBank article databases, and the Library's web resources. The team also creates customized bibliographies, webliographies (annotated lists of web sites), pathfinders, and Internet scavenger hunts.

In its first year, School Corps sponsored two successful library card campaigns in which 68,680 K-12 students and faculty participated: *The Great Library Card Adventure* for grades K-5 and *Get Carded!* for middle and high schools. For grades K-5, the five schools with the highest percentage of their students signed up for library cards received an assembly and twenty new books for their libraries. Four schools tied for first place, with 100 percent of their students and faculty signed up for library cards. For *Get Carded!* 10,000 students who already had or signed up for a Multnomah County Library card received a *KewlCard* that provided discounts from fourteen local merchants. These included one free bagel, one dollar off

a compact disc, 20 percent off book purchases, and two for the price of one at a local Internet cafe.

Nearly 16,000 students, teachers, future teachers, parents, and media specialists have attended or utilized at least one of over 300 School Corps presentations and customized services. Diane Wetzel, Title I coordinator at Alice Ott Middle School stated, "I'm so glad you have this service. Hopefully my students will begin to use the library. Many of them have never been there before." Particularly popular are the customized webliographies. "Everybody loves the webliographies; they have been especially appreciated by the teachers," comments Karen Gaddis-Philips, Sam Barlow High School's media specialist.

In summer 1998 team members presented science programs, technology training at libraries, schools, and community agencies, and a *Wild Wired Words* web camp at which disadvantaged youth created an illustrated story that they published on the Internet.

In August the School Corps sponsored three successful Educator Evenings. Teachers from K-12 public and private schools attended one of the three-hour programs, which included hands-on training in the Library's catalog, the article database, and web resources. This was a great opportunity to network with educators and to identify new outreach clientele. After attending these workshops, numerous educators contacted the program to schedule a School Corps librarian at a faculty meeting or for a class technology presentation. Especially significant, all program evaluations were returned. How were all returned? Teachers traded completed evaluation forms for coffee coupons. A great incentive! One educator stated, "[The School Corps Librarians] make me want to become a librarian!" The School Corps is currently working with Multnomah Education Service District to consider accreditation of future Educator Evenings as formal teacher continuing education credit opportunities.

The School Corps has also been nationally recognized, earning the title, "MCI Cybrarian of the Year" for Oregon in 1998. The team presented or will be presenting at numerous conferences: Oregon Library Association, Oregon Educational Media Association, New Mexico Library Association, PTA National Conference, and Online Northwest.

As the program's second year begins, the team will continue its outreach to community agencies, work on cooperative projects with youth librarians, offer Educator Evenings regularly, promote a kindergarten library card campaign, and extensively plan three one-week web day camps for the summers of 1999 and 2000.

For information about the Multnomah County Library School Corps, please contact Jackie Partch, (503) 736-6004, jacquelp@nethost.multnomah.lib.or.us

By definition, a union list or union catalog is a cooperative endeavor of a group of library partners. Over the past 30 years Oregon libraries have worked together to meet technological and funding challenges in order to build, maintain, and develop Oregon's statewide union list of serials. The fact that ORULS has not only survived but thrived for nearly three decades without a structure of legal contracts, but rather a voluntary structure of cooperation among participant libraries and users, makes this project a remarkable example of partnership.

Thirty Years of Union Listing in Oregon

—Reflections on ORULS and its Predecessors

by Deanna Iltis,
ORULS Project Coordinator, Oregon State Library

part·ner·ship *n*. the state or condition of being a partner; participation; association; joint interest

GETTING STARTED

Partnership was certainly on the agenda when three Oregon State System of Higher Education (OSSHE) libraries formed the Portland Area Automation Committee in 1966. The group consisted of the University of Oregon Medical School, Dental School, and Portland State University. The committee was "initially formed as a discussion group to plan for an eventual online serials check-in system to be shared by the three Portland libraries of OSSHE. Subsequent meetings were concerned almost exclusively with grant applications for union listing" (Abrams, 1983). With a Public Health Service Medical Library Assistance Act grant for FY1966/67, the union list project began. Because of its computer capabilities, the Medical School initially hosted the project, and by 1968 the union list contained over 10,000 holdings.

By 1970, the University of Oregon and the Oregon State Library had joined with the Portland OSSHE group, creating a statewide consortium. Union listing continued, funded by the first of a two-phased LSCA Title III grant (for cooperative projects between two or more libraries). Phase 1 of the grant ended in late 1971 with the publication of the OSSHE-OSL Pilot Project Union List in book form. Coincidentally, in October 1971 the Northwest Association of Private Colleges and Universities published the NAPCU Union List of Serials, also in book form (Abrams, 1983). With similar aims and objectives, these two groups would soon joint forces.

1974 marks the true beginning of the Oregon Regional Union List of Serials as we know it today. The project office had moved to Portland State University, under the able and dedicated guidance of Daphne Hoffman and Bill Abrams. Under phase 2 of the LSCA grant, geographic and type-of-library coverage broadened to include 47 libraries in Oregon, Washington, Idaho, and Montana: 9 OSSHE colleges and universities, 21 NAPCU libraries, 13 community college libraries, the State Library, Library Association of Portland, Oregon Historical Society, and Oregon Regional Primate Research Center.

For the next two years, 1974-1976, nineteen PSU staff members input cataloging records and serial holdings for 50,000 ORULS titles, using IBM punch cards. From a perspective nearly 25 years later, the work accomplished during those two years seems a truly incredible feat. In late 1976 the project published the Oregon Regional Union List of Serials in microfiche and in a 4 volume set, fulfilling phase II requirements of the federal grant. With the end of the grant, the project became inactive and the project office at Portland State University closed.

GROWTH AND DEVELOPMENT

A brave beginning—but what would happen next? Partnership prevailed. In August 1977, participants from a wide range of libraries met at what we would now call a stakeholders meeting. The "Mallory Hotel Meeting" hosted by the State Library resulted in the transfer of ORULS Project operations to the State Library. More than a decade of stable funding through LSCA grants followed, with Michael Haeuser and then Lynn Chmelir at Linfield College serving as grant administrator, and John Webb at the State Library serving as operational administrator. Pam Smith served as ORULS editor until 1980 and Deanna Iltis from 1980 to the present. The second microfiche edition, ORULS-2, appeared in December 1978.

By the time the 3rd microfiche edition appeared in 1980, the number of participants had more than doubled, from 47 in 1974 to 114 in 1980. New participants included public libraries in every geographic area of the state, OHSLA health science libraries, and several special and governmental libraries. Many of the out-of-state NAPCU college libraries had become inactive list participants, but a handful of college and health science libraries in Washington State remained, assuring the continuance of ORULS as the Oregon Regional Union List of Serials.

A direct outgrowth of the Mallory Hotel Meeting in 1977 was the formation of the ORULS Technical Advisory Committee to advise the State Library and the ORULS editor on technical matters relating to the development and maintenance of the database. The following 1984 snapshot of members shows the breadth of this hardworking and dedicated committee:

Isabel McDonald, Primate Center (special libraries), Chair; Bill Abrams, Portland State University (OSSHE); Ted Grams, Portland State University (OSSHE); Br. Frank Drury, University of Portland (NAPCU); Maria Koehmstedt, Clatsop Community College (community colleges); B. Keppel, Oregon Health Sciences University (health science libraries); Walter Kurth, Library Association of Portland (LAP); Merrialyce Kasner, Oregon State Library (OSL).

The decade from 1978 to 1988 was a time of change in both library technology and standards. The Library of Congress initiated a change from latest title cataloging to successive title cataloging. The ANSI Standard for Serials Holdings Statements at the Summary Level had been issued in 1976, and AACR2 appeared in 1980 with far reaching changes in rules of entry and related serials cataloging rules. The Technical Advisory Committee met regularly to make policy and technical decisions as the ORULS Project incorporated these developments.

ONLINE REVOLUTION

In 1982 OCLC launched a serials control and union listing system. In conjunction with the existing online interlibrary loan function, the new union listing capability introduced a revolutionary change—from older batch-load union listing technology and paper ALA Interlibrary Loan forms to interactive, online input and services.

In November 1982 the Project formed the ORULS/OCLC Advisory Group, composed of university technical services librarians with extensive OCLC experience. The group undertook a pilot project to evaluate the OCLC union listing capability by union listing holdings for all new ORULS titles via OCLC, while continuing to update holdings for existing ORULS titles as before, in the older database. Online union listing was an overwhelming success. After just four months the group strongly advised that OCLC union listing be made available to all ORULS libraries for all categories of union listing. The ORULS Project quickly agreed and officially closed the older, batch-loaded ORULS database.

In 1983, the group reorganized as the ORULS Online Advisory Group, to advise the Project on procedures for inputting data, upholding national standards, and maintaining quality control in the online union listing environment. The group also worked on procedures for converting older ORULS holdings to the new ORULS/OCLC database. Members of these two online advisory groups included:

> May Fogg, Lane Community College; Randy Collver, Lewis and Clark College; Helen Horvath, Oregon State University; Karen Darling, University of Oregon; Susan Hinken, University of Portland; Bonnie Allen-Walsdorf, Willamette University; Lysa Hall, Willamette University, School of Law; Shirley Lowman, Oregon State Library.

During 1984-1988, with additional LSCA funding and staff, the ORULS Project concentrated on converting older ORULS holdings to the ORULS/OCLC database. By October 1988, when the Project issued the 7th microfiche edition of ORULS, the holdings in the ORULS/OCLC database totaled 145,000 (Webb, 1988).

CHANGING TIMES, CHANGING FUNDING

LSCA funding in Oregon is earmarked for projects in the initial development stages, and by the mid-1980s the ORULS Project was beginning to enter a more mature phase. In 1984 the State Library formed an administrative advisory group to advise the State Library on the future of the ORULS Project after LSCA funding would no longer be available. Over the next several years the ORULS Advisory Council, composed of library administrators from various types of libraries and geographic regions of the state, considered the future administration, scope, and funding of the ORULS Project. Members included:

ORULS through the years

> Kevin Feeney, Bandon Public Library; Karen Hadman, Bonneville Power Administration; Margaret Mason, Central Oregon Community College; Lynn Chmelir, Linfield College; Jim Morgan, Oregon Health Sciences University; George Shipman, University of Oregon; Allan Quick, West Linn School District; John Webb, Oregon State Library.


With the advice and support of the Advisory Council, the ORULS Project began a transition to self-supporting status when LSCA funding ended in 1988. By the time the 8th ORULS microfiche edition appeared in 1990, a biennial subscription structure was in place. Subscription fees were set on a sliding scale so that all libraries, from smallest to largest, could afford to participate. Over the next 4 years, the subscription funds covered a large portion of the Project budget, with the remainder subsidized by the State Library.

By 1993, anticipated changes in the method of State Library funding necessitated that the ORULS Project become completely self-supporting. Clearly it was time once more for library partnership. In November 1993 the State Library hosted "Focus on ORULS," a stakeholders meeting of 25 ORULS users representing all types and sizes of libraries. The group considered a wide range of cost-saving ideas and possibilities for reducing ORULS services and products. The consensus of the group was to maintain the full scope of ORULS activities and to move to an annual membership funding structure with voluntary contributions from the libraries that used ORULS data.

Because of the cooperation of hundreds of Oregon libraries, the ORULS Project has been self-supporting for the past four years. ORULS may be unique among union list groups in maintaining itself by means of voluntary membership contributions. The libraries of Oregon should take considerable pride in their part in this accomplishment.
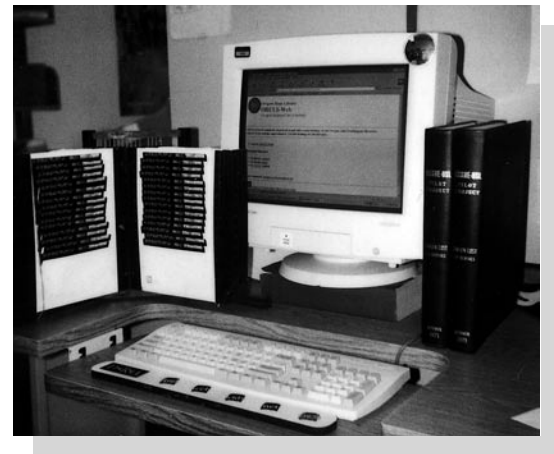
PORTALS Planning:

Revisiting the Future (and Past) of the Virtual Library

by James J. Kopp,
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and

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The Portland Area Library System (PORTALS) recently observed the fifth anniversary of the signing of the Charter that established the consortium. On July 21, 1993, the president and chief executive officers of the fourteen member institutions signed the document that established "an organization of public and private institutions committed to working cooperatively to expand and enrich the information resources and services necessary for the scholarly activities of the college and university community and those people with similar needs in the greater Portland area" (from the PORTALS Mission). Although five years seems like a relatively short period for most of us, these five years perhaps have included dramatic changes in the area of library and information services worldwide as well as for the member institutions in PORTALS.

When PORTALS was established, less than half of the member institutions had local integrated online library systems, many did not have high-speed Internet connections, and the World Wide Web was still just over the horizon. As this fifth anniversary of the official founding of PORTALS approached, not only had the member institutions moved well beyond the capabilities they had in 1993 but they were eager and ready to assume an even more aggressive approach to the realization of the virtual library that was the basis for the creation of PORTALS. It was time to take stock of the present of PORTALS and to see where it should go in the future. In doing so, it was also necessary to review the past of PORTALS to see what has worked, what needs to be improved, and how the changing landscape in which PORTALS exists has been altered since its inception.

To address these various issues, PORTALS initiated an intensive planning process in July 1997 with the goal of having a renewed vision and direction for the consortium by the time of the fifth anniversary observation. This paper reports on that planning activity as well as the developments leading up to this renewed planning process. Many questions remain unanswered as several other variables remain to be determined, but the planning effort undertaken provided a framework in which to build upon the past and to prepare for the future.

HISTORY

The history of PORTALS is rooted in planning activities. It was "A Strategic Plan for Improving Academic Library Resources in the Portland Metropolitan Area," a document submitted in October 1990 to the Governor's Commission on Higher Education in the Portland Metropolitan Area, that perhaps can be viewed as the formalization of the idea that something like PORTALS should exist in the Portland Metropolitan Area. This document reflects the vision identified by an ad hoc committee of library directors from eight of the institutions that would come to be PORTALS members. The authors of this "Strategic Plan" submitted this document to the Council of Presidents of the participating institutions. In addition to identifying an initiative for a "Regional Research Library," the Governor's Commission also called for the creation of the Greater Portland Trust in Higher Education (GPT) with one of its initial tasks to be "a fundraising effort for a regional research library serving all institutions in the metropolitan area."

In February 1992 a newly formed Library Steering Committee (soon known as the PORTALS Steering Committee) met for the first time. Later that year a grant proposal was prepared and submitted to the Murdock Charitable Trust requesting funds "to complete and implement a strategic plan for the [PORTALS] project." In June the Trust awarded a $65,500 planning grant for PORTALS and the Consulting Librarians Group (Sandra Cooper, Linda Crowe, and Robert Drescher) was hired as consultants for the planning process. The Murdock-funded planning project resulted in several documents that served as the focus of PORTALS planning; the "Final Report" of the Consulting Librarians Group largely addressed organizational issues, and the "Report of the Steering Committee" focused on functional objectives. With the submissions of the planning documents in March 1993, the path had been laid for the formalization of the PORTALS organization. Following the signing of the PORTALS Charter in July and Doug Bennett's appointment as Executive Director, PORTALS set out to address those goals and objectives established in the planning process. In the months following the charter's signing, additional planning resulted in several important documents, including a statement on "Access to Resources and Services of the Portland Area Library System" and policies on Reciprocal Borrowing and Affiliate Libraries.

With Doug Bennett's resignation as Executive Director in June 1994, the focus within PORTALS shifted considerably from planning to implementation, in

PORTALS
Portland Area Library System

particular at the local level as ten of the PORTALS members had received funds from the Murdock Trust for installing or replacing local integrated library systems. The appointment of Howard McGinn as Executive Director in July 1995 coincided with the award of a Department of Education HEA II-B grant ("Hatfield grant"), and general planning activity was tabled as management and implementation of the grant took precedence. Although the PORTALS Board held a planning retreat in the summer of 1996, sustained planning activity was not undertaken at that time. By mid-1997, the need for renewed planning was increasingly evident.

NEED FOR PLANNING
The changes that had occurred in just the four years since PORTALS official inception pointed out the need to reassess several aspects of its activities, operations, and even existence. Beyond the fact that the PORTALS planning documents had grown dusty with age, there were two other major reasons why a renewed planning activity was necessary within PORTALS: 1) the need for planning at a functional level, and 2) the changing landscape within which PORTALS exists.

PLANNING AT A FUNCTIONAL LEVEL
The Strategic Plan of 1990 and the updated version of this plan done in 1993 addressed certain "functional" aspects of what PORTALS could and should undertake in specific areas, including collection development, databases, and resource sharing. In many ways, several of the stated Outcomes and Specific Strategies of these plans had been realized, largely through the committee structure put in place at about the same time as the acceptance of the revised plan in 1993. With the initial completion of these objectives, in addition to the changes taking place as noted below, a refocus on planning at the functional level was required.

CHANGING LANDSCAPE
There are many changes in the library, higher education, political, economic, and technological landscape that made the renewed planning activity vital at this time for PORTALS. Some of these are quite obvious; others are less visible but still of significance. The introduction of these new elements and the changing nature of others required a reexamination of the planning at both the functional and organizational level for PORTALS. Just two general categories of the most significant in some key areas are discussed below.

TECHNOLOGICAL
One of the most obvious changes in the landscape in which PORTALS exists is that associated with technology, from power on the desktop to network and telecommunication enhancements. PORTALS was conceived in the Gopher era when the World Wide Web was hardly on anyone's radar. The changes that are at the base of that transformation are directly linked to some of the issues that confront the existence of the PORTALS technological environment.

But the impact of the change does not just focus on the PORTALS "central" aspect but the fact that the member institutions have developed and enhanced their own local environments well beyond what was thought possible when PORTALS was conceived.

ORGANIZATIONAL
There are several ways to examine the changes in the organizational landscape surrounding PORTALS. Perhaps one of the most obvious is the realization of Orbis, which at the time of the revised Strategic Plan in 1993 was just emerging as a bona fide idea and which subsequently received funding from the Meyer Memorial Trust to give it life. Since then the growth of Orbis and the enhancements and expansion of its activities have made it an important player on the same landscape as PORTALS.

In conjunction with this is the revitalization of library consortia nationwide which seems to be based on the convergence of several factors that also bear on PORTALS existence, namely technological, political, and economic factors. This resurgence of library consortia is having an impact on the marketplace where new technological products are introduced and how applications such as databases and full-text journals are being packaged and priced.

PROCESS
The planning process undertaken in PORTALS in 1997-98 was an attempt to incorporate the efforts undertaken in the past, but to enhance these efforts with a consistent and uniform process that addressed some weaknesses and gaps of the earlier planning activity. A "Plan to Plan" document was developed by PORTALS staff and approved by the Council of Librarians in July 1997 (available at: http://www.portals.org/plantoplan.html).

As in 1992-93, planning was to take place on two levels, organizational and functional, but the functional aspects were to drive the organizational issues. Functional planning was the focus of an Ad Hoc Planning Advisory Group (PAG) appointed by the Interim Executive Director. This group consisted of the current chairs of the four active, standing committees of the Council of Librarians, the Chair and Vice-Chair of the Council, and, in an effort to identify the role that Orbis plays in PORTALS planning, the current Chair of the Orbis Council.

The PAG served as the communication "hub" for the planning process at the functional level and as a source for idea exchange, support, and problem identification. Planning Task Forces in specific functional areas were chaired by members of the PAG who mostly served as chairs of the standing committees. Task Forces were comprised of eight or nine individuals, most coming from the membership of the committees involved. Three specific functional areas were identified: Access and Delivery Services (which combined Circulation and Document Delivery Committee members), Cooperative Collection Development, and Electronic Resources.

Part of the effort to enhance the planning activity with a consistent and uniform process included two workshops offered to PAG members and others on the Planning Task Forces. Training workshops in "Effective Meeting Management: Facilitating Group Problem Solving and Decision Making" and "Strategic Planning" were held in September 1997 and sought to provide the basis for collaborative problem solving and structuring planning activities and documents. To assist in getting the planning process underway, a planning binder was prepared to provide important background information, including the "mandates" and "mission" of the organization. Following the model presented in the "Strategic Planning" workshop, each Task Force used this background information to develop goals, strategies, activities, evaluative criteria, and a vision for each of their functional areas. (See Figure 1.)

The Task Forces met from November 1997 to March 1998 and followed a general outline addressing the elements of a strategic plan. These elements were
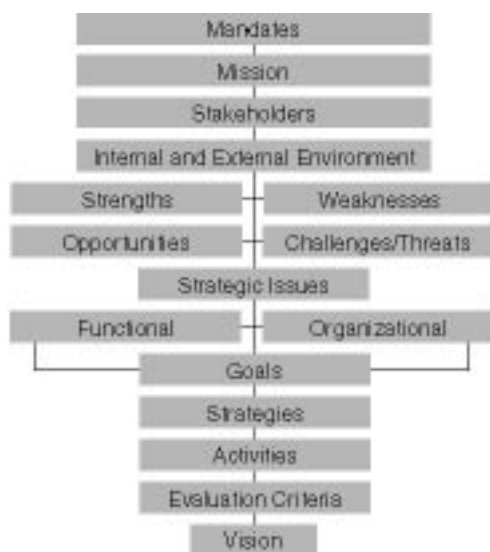

Figure 1: Strategic Planning Elements

compiled into functional planning documents for each area and these were submitted by March 31, 1998. The PAG reviewed the individual documents at an all-day meeting in mid-April and a composite "master plan" was drafted for the Council of Librarians. At two all-day meetings in late April and early May, the Council reviewed the master plan and, in response to the question "What kind of organization needs to exist to address the strategic issues and goals?" a broader organizational plan was constructed and compiled for presentation to the PORTALS Board of Directors for their review at a June meeting. Although the Board did not accept all aspects of the organizational plan, it endorsed the planning activity and the functional aspects of the process. In September the Council of Librarians adopted an initial implementation plan for addressing the activities as identified in the plans. New functional committees were organized based on priorities coming out of the planning process and these newly defined groups initiated their efforts in the fall.

Planning should be an ongoing process and the groups involved in planning for PORTALS were diligent in providing evaluative criteria for assessing the goals, strategies, and activities recommended in the planning process. It remains to be seen how effective the outcome of the planning process was, but in revisiting the future and past of the vision of the virtual library within PORTALS, the planning activity has proved to be of much value. **Q**

NOTES
The eight institutions involved and the library directors at the time were: Lewis & Clark College (Randy Collver), Oregon Graduate Institute (Maureen Sloan), Oregon Health Sciences University (Jim Morgan), Pacific University (Ron Johnson), Portland Community College (Barbara Swanson), Portland State University (Tom Pfingsten), Reed College (Victoria Hanawalt), and the University of Portland (Fr. Joseph Browne).

Members of the Steering Committee included: Doug Bennett (Reed), Randy Collver (Lewis & Clark), Ginnie Cooper (Multnomah County Library), Lesley Hallick (OHSU), Susan Resnick Parr (Lewis & Clark), Tom Pfingsten (PSU), Don Rushmer (Pacific), Maureen Sloan (OGI), and Barbara Swanson (PCC). Kris Hudson, Acting Director of GPT, and GPT Board members Dick Raymond and Ogden Beeman also participated on this group.

For several aspects of this resurgence in library consortia, see the March 1998 issue (Vol. 17, no. 2) of *Information Technology and Libraries,* guest edited by John Helmer. Also see William Gray Potter, "Recent Trends in Statewide Academic Library Consortia," *Library Trends* 45 (Winter 1997): 416-34.

Planning Advisory Group members were: Diane Braithwaite (MHCC, Circulation Chair), Joan Carey (Clark, User Services Co-Chair), Lynn Chmelir (Linfield, Orbis Council Chair), Leonoor Ingraham-Swets (Clark, Collection Development Liaison), Dolores Judkins (OHSU, User Services Co-Chair), Jim Morgan (OHSU, Circulation Liaison), Patrice O'Donovan (OHSU, Collection Development Chair), Tom Pfingsten (PSU, Document Delivery Liaison), Carol Resco (OGI, Council Vice-Chair), Barbara Swanson (PCC, Council Chair), Cathy Wright (Multnomah County Library, Document Delivery Chair), and Leslie Wykoff (WSU-Vancouver, User Services Liaison).

The meeting records for these Task Forces as well as other information related to this planning activity can be found on the PORTALS Web side at http://www.portals.org/strategic_planning.html.

Corporate Partnerships:

The Art of the Deal

by Leo MacLeod,
Entrepreneurial Activities Coordinator,
Multnomah County Library

You finally mustered enough courage to make that cold call. The Books for Babies program that really pulls heartstrings. It's your work's passion. A great program that's starting to make a real difference with the traditionally underserved populations. Doesn't the name say it all? How can they turn you down?

The phone rings until voice mail kicks in. You hang up. You call several times that day, and the next, and the next. Voice mail every time. Until on day four, when you finally get through, but by this time you are so worked up that you forget your relaxed and well-rehearsed pitch. You fumble. You stutter. The corporate executive on the other line is not giving you any help. Silence. Finally, he says, "So you're asking for a donation? For some library program? You really need to talk to Keri Coulter and she's on vacation for two weeks."

Still you don't quit and two weeks later, when you finally get Ms. Coulter, she says dismissively, "Oh, there's no chance for funding this year. All our monies are committed. Try back next year." Click. The phone goes dead. And so goes your spirit.

Welcome to corporate solicitation, where time is money and money takes time. It is a strange and mysterious world, made all the more inscrutable by its frenzied pace and shifting landscape: Mergers. Changing personnel. New marketing initiatives. Harried executives always racing to stay ahead of the next wave. You don't understand it. You don't really want to understand it. You just want funding. Why does it have to be so hard?

Before you go out knocking on a potential corporate sponsor's door, ask yourself: How important is this money to our organization? Are there other ways I can get the job done? Other pots of money? Ways I can scale down the program? State monies or foundations that I have dealt with before and know I can approach?

If you're still reading this, it's a good sign that you're not totally discouraged. The reality is it's possible to get corporate donations without a terrific amount of work; a gift certificate for a raffle, even $500 to help a program. But if you're looking for a successful corporate partnership that truly contributes to your bottom line, roll up your sleeves. It will take time

and work and diligence. The payoff will only be as good as the investment you make.

Hard Lesson #1: It's about catering to their interests. Crass? Yes. Realistic? Absolutely. Really necessary? Sorry, that's the way it is.

There was a time not long ago when corporations felt they had a social obligation to share the wealth and to improve the community in which their employees live. To give back, as it is often put. They still do, with the twist that many are feeling the heat of the crowded and competitive marketplace to leverage giving into a marketing or public relations benefit. This is not to say there aren't companies who write checks for good causes. But more are swayed by the proposal that includes an appearance by the CEO at the press conference with a large check, their logo on the program guide, and complementary passes to a fundraising event. Even so-called quiet companies are going to scrutinize proposals that allow them to feel that their contribution is going for the maximum benefit. They want to be able to say they—and they alone—sponsor that after-school tutoring program for teenagers. As business people, they may want to know how credible you are. Will you do what you say? What's your track record in administering programs? Will you make sure that they are prominently featured as sponsors?

At Multnomah County Library, we have had solid successes with attracting and keeping corporate partners. (Any business will tell you customer loyalty, not customer acquisition, is the key to longevity).

The Library Foundation, newly formed to raise enhancement funds for the library, including the remodeling of Central Library, has been very successful knocking on boardroom doors. Among its successes, the Foundation has secured a $50,000 grant from banking giant, Wells Fargo, for our *Homework Helper* program. For $150,000, new merger, PGE - Enron, got bragging rights for the *PGE - Enron Children's Media Center*. In both cases, a similar strategy is noteworthy. PGE - Enron and Wells Fargo were both new to Portland and wanted to make a statement about their commitment to the community. The Library Foundation found out how much the bank and the utility were capable of giving, who to ask, what to appeal to, all in an economic and persuasive way. Hitting all the right notes and not wasting time was essential.

Paul Bragdon, Multnomah county library foundation president and Ginnie Cooper, director of libraries, Multnomah county accept check from Rick Allen, Wells Fargo.

Perhaps our most illustrious long-term partner is Starbucks Coffee. At their expense, they built a custom espresso bar in the Central Library. The entire operation is turnkey. Aside from monthly rent, which is a percentage of gross sales, Starbucks agreed to participate in library sponsorships, as well. To maximize the relationship, Starbucks has worked with the library on developing some unique campaigns, providing cash underwriting, and marketing support in all 50 Portland area stores. In nine months, they have made a total contribution of more than $100,000 and helped to reach millions of people at no cost to the library. It is truly a mutually beneficial relationship that we continue to value.

To reopen the Central Library after the renovation, Starbucks, along with presenting sponsor AT&T Wireless, was a major cash sponsor of the *Come Home* campaign and received visibility on banners, signs, television ads, and busboards. Starbucks also supported the campaign in all stores with *Come Home* exterior banners, napkins, and T-shirts for all 500 of their employees.

At their own expense, Starbucks created, produced, and mailed 65,000 "free drink" postcards to library patrons who were blocked from using the library because of large overdue fines. Pay off your fine and get a free latte! The *Better Latte Than Never* campaign recovered $35,000 in additional fines, advertised, and drove traffic to the library espresso bar (thereby boosting revenue again through receipts). One patron paid $80 for a free latte!

Starbucks has also provided free coffee for library lunchtime Brown Bag lunch series with corporate identification on flyers. It has underwritten theatrical productions at schools in which 100 percent of students and teachers signed up for library cards, with free drink coupons to teachers as an incentive to participate.

Most recently, Starbucks wanted to help reopen the library on Sundays until a new tax levy was passed to keep it open permanently. With their commitment of cash from the sale of newspapers and production of an in-store campaign in all 50 stores that would include visibility for participating sponsors, Starbucks helped the library develop an attractive sponsorship package to lure retailer Nordstrom and high-tech company Tektronix. The other sponsors admitted that having Starbucks pitching for the library gave the cause both star power and credibility.

With stores opening all the time in new markets, Starbucks' greatest challenge is managing its phenomenal growth. Their market is affluent, conscientious and discriminating. They want to know what Starbucks is giving back to the communities they infiltrate and markets they dominate. By focusing on promotions with an extremely popular institution like Multnomah County Library (80 percent of residents have library cards; circulation of over 8 million items a year tops Los Angeles Public Library),

Starbucks can reach many people both in promoting literacy and revealing its human side. The library wins by maximizing and leveraging Starbucks for its market penetration and deep pockets.

For those of you who want to venture forth and forge corporate partnerships, keep in mind:

1. PARTNERSHIPS ARE MUTUALLY BENEFICIAL RELATIONSHIPS.
You know what's in it for you. What's in it for the corporate partner? Is there a publicity opportunity? Something they can put their name to? Can their employees be involved as volunteers? Did an influential business person make the ask for you, playing the game of who owes whom? Is it a great program that has proven results with a modest budget? In that case, decision-makers who are accountants are going to be drawn to the proposal over marketers who are looking for what they can do with it. Keep the dialog going. Knowing the concerns and interests and showing that you are aware of them are key to keeping the sponsor a long-term ally rather than a one-time friend.

2. CULTIVATE THE RIGHT CONTACTS.
In many cases, having the right person ask at the right time can outweigh almost any other consideration. There's much to be said about business on the golf course. I have seen executives toss a proposal to the side, slap the solicitor on the back, and start jawing about vacations. Ten minutes later with hardly any mention of the program, a commitment was forthcoming. The people in charge do get to call many of their own shots. The key is credibility. If they know they can trust the person making the ask, the rest beyond the amount of dollars are just details. You can go it alone, but if you want to tap into larger donations, find the right person to make the final ask.

3. UNDERSTAND WHAT APPEALS TO THEM.
This involves research (finally, something you're comfortable with!) as well as an ongoing dialogue. What is the focus of the corporation's giving? If they give to diseases and shelters, it may be tough. If, on the other hand, they like kids and literacy, you're halfway there. What else are they contributing to? What other gifts have they made? What's the range? Who was the recipient? Was it a quiet gift or was their name all over the place? It is also useful to know as you explore the intricacies of a corporation, where money comes from. Do you have the ear of a young marketing coordinator, eager to leverage the most for his company? In that case, the money may be coming from a marketing budget. Stress the opportunity to appeal to their customers. Or are you talking to an employee in human resources who sits on a committee of other managers? In that case, the money comes from a designated pool for donations. Stress program effectiveness and organizational credibility but also try to add something that will make the marketers happy.

Southern Oregon University and Rogue Community College Libraries:

Partners in Access

by Teresa Montgomery,
Head of Technical Services
and

by Deborah Cook,
Head of Circulation Services
Southern Oregon University

Southern Oregon University (SOU) Library's recent implementation of a patron-initiated, electronic materials request feature enabling Rogue Community College (RCC) students to order materials electronically from the SOU catalog and have them delivered to RCC libraries is just the latest instance of cooperation between these two Southern Oregon libraries. In 1979, the library directors of SOU and RCC along with those from Umpqua Community College and the Oregon Institute of Technology signed an agreement that allowed students at these institutions reciprocal on-site checkout privileges of circulating items.

The annexation of Jackson County into the Rogue Community College District in 1996 prompted Southern Oregon University and Rogue Community College to begin an expanded, collaborative education program. A new RCC Medford campus was developed in several existing downtown Medford buildings, one of which houses the Riverside Research Center (RVC), a small library with a modest reference collection and a number of PCs with access to electronic databases. At the same time, SOU began offering courses at the RCC Grants Pass campus and expanded course offerings at its Mary Phipps Center in Medford. The four-year implementation plan will culminate in RCC teaching more lower-division transfer courses while Southern concentrates on providing more upper-division and graduate offerings.

In September 1997, a regional library planning group composed of representatives from SOU, RCC, and the Jackson County libraries met to discuss issues in providing extended services to SOU and RCC students in Medford and Grants Pass. The group discussed reference services, course reserves, the return of library materials, interlibrary loan, hardware/software at each site, and the services already provided by the various libraries to SOU and RCC students.

Having seen the growing success of the Orbis Borrowing feature and knowing of a similar "request" feature available in the SOU Library Catalog, Sue Burkholder, Southern Oregon University Library Director, convened a SOU Library Materials Delivery Workgroup. Its charge was to develop and implement a materials delivery system whereby RCC and SOU students enrolled in credit courses along with RCC faculty and staff could electronically request circulating materials from the SOU Library. Requesting these materials could be done electronically on-site at the Riverside Research Center in Medford, SOU's Mary Phipps Center in Medford, the RCC Library in Grants Pass, or via Internet access from an individual's home computer. The Jackson County Library Services courier service was already in place, with weekday delivery and pick-up of materials from its fifteen branches and RCC, SOU, and Josephine County libraries. Delivery of requested materials for pick-up by students within 24 hours was the optimum goal.

Initially, the SOU work group was made up of the Head of Circulation Services (Deborah Cook), the Head of Public Services (Connie Anderson), the Distance Education Librarian (Harold Otness), and the Head of Technical Services (Teresa Montgomery). After the work group met several times to frame the initial planning phase, representatives from RCC libraries joined including the Director of Library Services (Lynda Kettler), Coordinator, Jackson County Library Services (Thomas Miller), and Library Services Specialist (Marian Masters). From March through June the group met eight times and formulated a plan to develop procedures, policies, and handouts; to download RCC student, faculty, and staff patron records into SOU's system; to train RCC staff to use SOU's circulation subsystem; and to access SOU's catalog via public computers at each site. Many details needed to be discussed and fleshed out. Regional access funds were used by the SOU Library to purchase additional patron records for the SOU Library online system, two more online access ports, delivery bags, a drive-up book drop for the RVC Library, and a drop box at the SOU Library.

Both Deborah Cook and Teresa Montgomery had been involved in the planning for Orbis Borrowing and this expertise proved invaluable for designing the SOU/RCC materials delivery system. Even so, configuring the online system (Innovative Interfaces) to accept requests from students at off-campus sites was complicated and challenging. The research on implementing the "Request" feature was significant. Decisions needed to be made to choose the best "Request" configuration. Many codes and options needed to be set up in a variety of tables in several places within the system. Test patron records mimicked RCC students and faculty and test requests were placed at the end of May. New staff logins and authorizations were established to permit RCC staff at Medford and Grants Pass to connect to the SOU

Cooperation out on the Eastern Oregon Frontier

by Ken Reading,
Coordinator of the Umatilla County
Special Library District

Libraries in Eastern Oregon have a long and successful history of cooperation in satisfying the needs of patrons throughout the ten-county region. They know first hand the benefits of equal access in a huge area that covers forty-three percent of the state of Oregon. Those who support and manage Eastern Oregon libraries are also very familiar with the unique problems of these small, short-hour, rural libraries that predominate the region. Over time we have seen some of our rural libraries accomplish much as they struggle alone to provide services with low funding levels. What is uncommon in Eastern Oregon is to see the size and scope of cooperation that exists. It didn't happen overnight. The hopes and dreams of all Eastern Oregon frontier librarians have been building for decades. Sure, like most libraries, the needs and the service passions have always been here and they have always been high. Eastern Oregon libraries, like libraries that accomplish things anywhere, could wear well the old saying "it ain't the size of the dog in the fight, it's the size of the fight in the dog." But that does not answer the question of why there is so much successful cooperation in our part of the state. So what is the answer? Simply said, it is trust. We know each other pretty well. We are good neighbors that depend on each other for help. That's it. It's really that simple.

Fostering all this trust over the years has been the Eastern Oregon Library Association (EOLA) which includes academic, public, school and special libraries. EOLA has been the main catalyst for better service since the early 1950s. Without question, most of the high-impact cooperative service accomplishments in the region over the last few years are due to the influence of EOLA.

It is quite startling to look back and view the number of projects that have, like dominoes, served as building blocks for better regional service. It is also no surprise that these projects have been related to the region's greatest needs: communications, technology, and planning. Since 1986, the following Eastern Oregon cooperative library projects highlight EOLA's unique regional cooperative history. At the same time they continue to prepare the way for the future:

> 1988 the "On-line Reference Service to Eastern Oregon Libraries' project was funded by a combination of Meyer Memorial Trust and LSCA grants and awarded to Eastern Oregon State College (EOSC). The project placed twenty microcomputers and ten fax machines in libraries throughout the region for use in searching online reference databases. This spawned the regional bulletin board system (BBS) that allowed for electronic messages and interlibrary loans between libraries.

> 1988 the "Umatilla-Morrow Counties Resource Sharing" project was funded by an LSCA grant that provided an automated library system hosted at Blue Mountain Community College (BMCC) to serve libraries in Umatilla and Morrow counties. The six largest public libraries and BMCC are online while smaller, remote libraries are served by dial-up with an annual CD-ROM catalog.

> 1990 Eastern Oregon School Libraries Network (EOSLN) received funding from Meyer Memorial Trust providing fax machines for thirty-six school libraries.

> 1991 EOSC receives an LSCA grant on behalf of EOLA for the "East Central Oregon Network" to provide an automated system for Union and Baker Counties and to serve as host to the bibliographic records of libraries in Baker, Grant, Union and Wallowa counties.

> 1992 EOSLN and EOLA collaborate on a $30,300 Meyer Memorial Trust funded grant to provide a resource sharing blueprint for the region.

> 1993 the "Southeast Oregon Library Network (SOLN)" project was funded by an LSCA grant that provided consulting assisting and an automated library resource sharing system for Treasure Valley Community College, Malheur County Public Library, and Ontario High School.

> 1996 the "Pioneer II Expansion" project was funded by an LSCA grant that expanded existing resource sharing access to remote school and public libraries in Malheur County.

Public libraries in rural Eastern Oregon may soon get even another boost. A 1998-99 LSTA planning grant currently in process is designed to develop a unified plan of public library service for the entire ten-county region for the 21st century. This EOLA planning project recognizes that Eastern Oregon public libraries have always lagged behind the rest of the state in providing comparable quality library service. The project proposes to make recommendations for a reasonably funded service plan for a unified ten-county regional library system by the end of 1998 to provide excellent library services to all 170,000 residents of Eastern Oregon. The consultant team is from the Northwest: Dallas Shaffer of Bainbridge Island, Ruth Metz of Portland, and Douglas Young of Bozeman, Montana.

A ten-county regional library system for Eastern Oregon could do many things. It could serve a larger area

than any public library in the United States, excluding Alaska (41,178 square miles). It could serve a larger area than five New England states combined (New Hampshire, Vermont, Massachusetts, Rhode Island and Connecticut). It could, as mentioned before, serve forty three percent of the area of the state of Oregon. It could serve the third largest population in Oregon after the Multnomah County Library and the Salem Public Library. It could also provide a new national model for quality public library services to rural communities in the 21st century.

As the Ten-County Planning project progressed, an interesting dichotomy began to surface. Even though there was a large degree of trust, there were emerging fears that needed to be addressed and quickly. So we did the logical thing. We called together a "fears" meeting about three months into the project and identified eight fear categories that needed attention:

Buildings: There was a fear that local library buildings and property ownership might be taken away. Would any new buildings, remodeling and furnishings be funded locally or regionally? Who would make these decisions?

Staff: The group did not want to see staff become accountable to people that did not understand library principles and practices. There was the fear of losing local control of personnel, wages, and benefits. There was also a misunderstanding of to whom staff would report under a regional system.

Document delivery/Courier: The fear was that delivery services would be less than adequate.

Collections: Regional cooperative acquisitions would be all right, but not loss of local selection and weeding control. There was also fear of losing support for local special collections.

Training: In-house vs. centralization and loss of individualization were issues.

Services: Equitable, basic services without loss of local uniqueness, customization, and/or local preferences were important. Also, we did not want to lose our local strong points because of the plan.

Funding: There was fear of not enough funding to support what we already had and that the plan would not produce stable and equitable funding.

Governance: We did not want a larger system that would mean a slower, less efficient work-flow. We did not want to be governed by idiots! We did not want to be governed by someone far away. We did not want to lose a voice in management of the new organization.

Because of distance we did not want a few people running things only because they had the ability to attend meetings.

All of the above fears are being taken seriously as the plan continues to evolve and we feel that they will all be solved.

Service goals for the proposed new regional library plan would be simple. First, it would be easy, fast, and efficient for residents to find, get, and use the information resources they want and need. Second, it would create the informational basis for the region's economic vitality and quality of life. Third, it would strengthen the ability of community libraries to serve the public, be cultural centers, and provide links to information. Fourth, it would insure maximum value for dollars spent.

Site visit at Enterprise Public Library by Ruth Metz, Consultant, Ken Reading, Project Director, and Duncan Lagoe from Joseph, Oregon

By creating a ten county regional library system that provides for adequate and basic services for patrons in their communities EOLA public librarians can:

- Lower prices. By joining together and becoming more efficient costs can be reduced by spreading them over a larger base of libraries.

- Develop services like tapes by mail, cataloging and processing, children's services, collection development, consulting or direct-service assistance, local and regional programs, financial development, and regional publicity and promotion of services.

- Win more grant and endowment money for the region.

- Contribute to regional economic growth by operating information and economic development services accessible directly by the public and by librarians.

- Increase the quality of life by raising service levels and partnerships (e.g. distance learning, job information, homework help, school relationships, business recruiting).

- Break existing isolation and improve management.

- Provide a regional governance structure consisting of Citizen Advisory Councils that will raise and discuss policy issues and concerns and advise a regionally elected board. A regional Librarians Council could develop annual service plans.

As we move into the final phases of the Ten County Library District planning process we are finding mostly widespread support for the project. We all recognize the complexity of what we are trying to accomplish. As of the deadline for this article, there appears to be a consensus that a multi-year simulation of the most important planning elements may be the wisest. By "practicing" being a regional library system we could:

- Put as much of the regional service model components into place quickly while awaiting the proposed elections that would enable regional and/or other funding to come forward.

- Find out what these proposed services really would cost and if they will make a real difference to library services in the region.

- Test a model for the region that includes the major components of the models our consultants have recommended without having to choose "blindly" a model that we would have to live with.

- Adjust and refine the model that really works best for us as we learn from the test.

- Be prepared to give real data to our citizens who will eventually need to support legislation and ballot measures to establish a regional library system.

- Turn our energies toward "doing" services we think will better serve Eastern Oregonians, while continuing to hone the governance and structure of the system, incorporating our real experience being a region.

- Demonstrate to funding authorities the ability of our libraries, governing boards and citizens to collaborate in the best interests of serving Eastern Oregon residents.

All of us out here on the Eastern Oregon frontier say "Howdy pardner" and "Let'er buck!" on behalf of library cooperation in the 21st century. **Q**

Multnomah County Library *(continued from page)*

"Blast Off" with Multnomah County Library's A Science Odyssey Program

Multnomah County Library was the only Oregon location and one of 125 community organizations and individuals across the country selected as a site for A Science Odyssey, a national PBS outreach initiative coordinated by WGBH in Boston. The Library's A Science Odyssey goal was to connect young people with science through library programs during spring and summer 1998.

Multnomah County Library created six science-theme programs to complement PBS's A Science Odyssey television series, which aired on public broadcasting in winter 1998. These library programs included activities created by Youth Services and by WGBH and the Museum of Science in Boston. The programs, aimed at fourth through eighth graders, included the following:

- **Mountain Maker, Earth Shaker**: volcanoes, plate tectonics, rock collecting
- **The Unique You**: genetics, fingerprints, taste buds, eye and hair color
- **A Drop of Water**: surface tension, water molecules
- **Eye-Popping Illusions**: optical illusions, kaleidoscopes
- **Blast Off!**: gravity, constellations, the moon
- **Electric Attraction**: circuits, electricity, magnets, static

Upper elementary and middle school youth explored five or six hands-on activities for each program. Multnomah County Library promoted A Science Odyssey program to home schooling families.

The Library also sponsored a successful A Science Odyssey camp-in for 180 youth and parents in April 1998. This overnight program included interactive science activities and a presentation by the director of the Western Bigfoot Society. Numerous county citizens emailed and mailed the Library with thanks for these educational programs. One grateful parent wrote, "These programs were wonderful, hands-on science lessons for children. The topics were interesting, the instructor enthusiastic, and supporting materials were appropriate."

Multnomah County Library School Corps continued to present A Science Odyssey throughout summer 1998 to culturally and economically diverse youth at summer schools, community centers, and Boys and Girls Clubs around the county. Overall, Youth Services provided more than seventy programs, reaching over 2000 county youth, ages nine to thirteen.

Patrons consistently requested that Multnomah County Library provide more hands-on learning programs in the future. As a result, the Library has planned "Hands-on-History," a series of programs that explore different eras in world history, for fall 1998 and winter 1999.

A Science Odyssey is fun and had positive reactions from parents and youth. Here's a great opportunity to present a program at your local library where all the planning has been done for you by WGBH and Multnomah County Library. Each program is most appropriate for grades four through eight and especially popular with home schooling families. **Q**

For information about A Science Odyssey programs, contact Kate Houston, Multnomah County Library (503) 736-6012, kateho@nethost.multnomah.lib.or.us

Statewide Database Licensing *(continued from page)*

on the list. If all those libraries on the list could get a good deal, their participation was more certain, and the package was less likely to unravel. The chosen vendor liked this approach, too. The user population was defined, and the potential load on their system could be easily estimated. Vendors are often willing to negotiate a better deal for a statewide purchase since their market share is increased and they can stake out a territory which will likely produce substantial income year after year. The more libraries that participate, the harder it will be to change to another information provider in the future.

Once the price was agreed upon, the SDLG needed to find a way to guarantee that most of the libraries on the list would agree to participate and share in the costs. An LSTA grant did the trick. Each library on the list received a small but important subsidy. The cost to each participant was reduced by 20% in the first year and 10% in the second year of a three-year price agreement. Almost everyone on the SDLG's list agreed to the contract. The cost distribution formula was based on FTE (for academic libraries) and population served (for public libraries). In the second year, more libraries were added to the contract based on the same cost share formula used for the original participants.

The second venture for the SDLG was to secure statewide access to the *Oregonian*. Once all the legal documents had been signed, the vendor issued a favorable quote for all public and academic libraries in Oregon. In this case, the product was limited to one core title, which helped to keep the quote affordable. The vendor also may have been motivated by the foot-in-the-door incentive, i.e., a chance to showcase their interface and search capabilities, and in the future, compete for a more substantial piece of the statewide market.

The past efforts to secure statewide database licenses in Oregon are distinguished in several ways. First, there has been no central money beyond the LSTA grants which have been used to jump-start the process. The lack of central funding complicates the selection and negotiation process considerably. Second, there has been no special funding to create a centralized purchasing process. For example, many states have created one or more positions to handle the licensing and billing paperwork. In Oregon, the Orbis Library Consortium (several academic libraries in Oregon and Washington) has stepped in to handle the administrative aspects of statewide licensing, but it is not clear if this arrangement can be long-term or extend to many other databases. And third, the K-12 sector has been excluded from the process. To date, many vendors have been unwilling to include K-12 libraries in the same contract. Although inclusion of K-12 is less common, a few other states have been able to reach agreements to provide school library access. Again, central funding seems to create the ability to negotiate statewide contracts more effectively.

Is Oregon an example of how not to do things? Absolutely not. The library community in this state represents a high degree of resourcefulness and creativity. It has been able to overcome many of the funding challenges and survive harsh political and economic climates. It has succeeded through grassroots and volunteer efforts. Progress to this point should be celebrated. Many libraries have saved thousands of dollars, and many library users have better access to core electronic resources. Continued progress in the area of statewide database licensing, however, will likely be limited without statewide funding. Those limits will apply to the number of databases which can be licensed and administered, and the number of libraries which can participate. The possibilities of statewide funding are never easy to estimate, but the Oregon library community can at least demonstrate a successful track record and provide ample evidence of cost savings. **Q**

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Orbis Courier Service *(continued from page)*

take on broad-based consortial projects. Perhaps the Northwest will forge a new model in which a variety of smaller specialized consortia will take on regional projects or create ad hoc consortia on a cost recovery or free basis. Given Orbis' experience with the overhead that accompanies even a modest project like courier service, however, it is unlikely that small consortia will routinely serve libraries beyond their immediate membership.

Without the incentives of central state funding that encourages geopolitical collectives, we are likely to see a dizzying array of collaborative projects in the future. Despite the inherent obstacles to broad-based regional collaboration, it is perhaps comforting to know that when the cause is clear libraries in Oregon and Washington can recognize shared interests that cross political boundaries and take a leap of faith to further the common aim of resource sharing. **Q**

Corporate Partnerships *(continued from page)*

4. FOCUS YOUR EFFORTS.

Just like relationships, it's tempting to want to throw in the towel if you are unsuccessful at first. It takes work to make them work. I don't like asking for money from strangers. It's not fun. I would much rather cultivate a friend so that the asks can eventually come down to a quick e-mail or phone message. When a relationship is established, it's easy to find support. The only way to do that is focus on a handful of good prospects. Don't paper the city with proposals to people you don't know, unless you need some prizes for a Summer Reading program. Target the likeliest funding sources and cultivate their support.

Oftentimes, what you thought was a solid idea for funding morphs into something the corporation favors. Caution: don't be transfixed by the lure of money. Is this really what you want the money to go for? Does it fit your organizational objectives? Or is there some way of making the library and funding source happy by compromising? Perhaps not a full-fledged, door-to-door outreach program, but maybe a published resource guide and web page?

5. DO WHAT YOU SAY.

So the money is in hand. You can relax. Right? Sorry, again. The key to establishing a good reputation in the corporate giving world is follow-through. Do what you say you were going to do. If the corporate logo was going on the program's T-shirts, make sure

it is there and send them a few as tokens of appreciation. If you were going to buy three computers, show them photos or give them a tour of your new center. Have them meet with some of the participants. Up to this point, I have talked about serving corporate needs. Don't underestimate the power of your programs. Let them sit in on a story hour for preschoolers rapt with attention over the telling of *The Very Hungry Caterpillar.* Have them meet one of your most inspired volunteers in the *Homework Helper* program. Emotion is good. Appeal to their hearts as well as their brains.

6. YOU CAN NEVER, EVER SAY THANK YOU ENOUGH.

Find different ways. Report back on the success during the funding period, offering highlights. Have volunteers or participants write letters of thanks. Give them a certificate of appreciation or plaque they can frame. When we re-opened for Sundays at Central, we had a thank you brunch (with donated food) for Starbucks, Tektronix, and Nordstrom. Nothing is as powerful for givers as to be thanked by their own employees for making a gift.

You may find that developing a corporate partnership is easier than I have outlined here. You would be lucky if that were the case. But if you follow these guidelines, you'll be in a better position to realize the kind of partnership that keeps on giving. **Q**

Cooperative *(continued from page)*

reference collections. In FY1997-98 MIX libraries made nearly 1.3 million direct loans. Washington County residents borrowed 306,544 items at other counties, and our participation in the MIX program will cost the Cooperative $81,504 this year. At 27 cents per loan, that is a very cost-effective extension of our services.

Assuring Excellence: The County defines library service levels through our contract with city and non-profit associations. The current contract's formula for distributing funds is based primarily on reimbursement for circulating materials, paying for service provided. While circulation may not sum up the total worth of a library, over the years we have found that in addition to being an easy and objective unit of measure, it tends to parallel other levels of a library's service. If you have knowledgeable staff that provides good customer service and your collection meets the needs of the local community, your library will circulate more books. Just like department stores, people return to places that have good products and good service.

In 1993 we added a reference component to the formula. Libraries received an amount of money adequate to maintain a current basic reference collection. The goal was to assure that even the smallest library could provide basic reference service and

that larger libraries could enhance their reference collections. In 1996 we added a third component as an incentive to increase library access. Libraries received additional funding equivalent to .25 or .50 of an average library assistant's salary to meet OLA standards of Adequate or Excellent for hours open to the public. (The amounts were enough to staff a building for the additional number of hours.) Countywide we have less than half the square footage recommended by OLA, so to make the best use of these crowded facilities, we created this incentive to keep the buildings open longer hours. It worked. All libraries met at least the Adequate standard for their respective service populations, and beginning this month there are now seven libraries open seven days per week.

In the future we'll be looking at ways for the reimbursement formula to measure better collection value, i.e. reward libraries for investing in the quality of their collections, especially items that are expensive or non-circulating like reference materials and local databases. We've also discussed using the Reference Grant funds as a pool to be used for subscriptions to shared electronic databases, rather than distributing it in small amounts to libraries. In the last 24 years we have matured from providing basic service to delivering a full range of services for a diverse and growing community. **Q**

Partners in Access

circulation system to renew materials, edit patron records, and collect fines.

The plans were completed before scheduled and implementation of the patron-initiated electronic materials request function occurred in July 1998. The final piece was the load of RCC student, faculty, and staff patron records into the SOU Library circulation subsystem. During the summer, RCC staff input patron records directly and testing was completed in August. During the first two weeks of Fall 1998 term classes, about 3,900 RCC patron records for students and 300 RCC faculty and staff were successfully loaded into the SOU online system.

The joint Southern Oregon University Library and Rogue Community College Library Materials Delivery Workgroup collaboration worked well since all members readily saw the potential benefits in creating this type of request/delivery system for their students. This ability to work well as a team did not come as a surprise. Over the years RCC, SOU, and Jackson County libraries have met for monthly luncheons that have established a foundation of mutual respect and trust as well as an understanding of the challenges and problems unique to our institutions and region. These institutions are well represented at the three yearly Southern Oregon Library Federation (SOLF) meetings. Total commitment and support for the

project from all members of the work group was the key to its successful implementation.

Although SOU students are not yet able to access RCC libraries' collections online, with RCC's migration to a new library automation system, this is a future possibility. The partnering between SOU and RCC libraries currently exists in several additional areas. Along with pick-up and return of library materials at RCC sites in Medford and Grants Pass, SOU students may use resources within these libraries. This cooperative, collegial attitude will work toward providing accessible library resources to SOU students as well as RCC students, many of whom will matriculate into the University's baccalaureate programs.

As of the end of October there have been only a few requests, but they have steadily increased. A relatively slow steady growth to this local system will allow participants to iron out any bugs yet to show up. The electronic patron-initiated request for SOU materials is so new that a full academic year will need to transpire before it can be evaluated. Stay tuned. **Q**
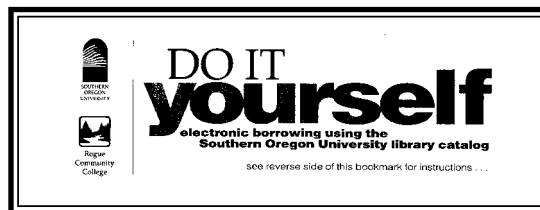
Thirty Years

TRUE PARTNERSHIP

When LSCA funding ended for the ORULS Project in 1988, the staff positions of editor and assistant also ended. Administrative duties were reassigned to State Library staff, but the sizable job of inputting holdings data for approximately 60 non-OCLC participant libraries remained. Once again, with the true partnership of Oregon libraries, a new, distributed system emerged. Since 1988 ten ORULS agents have been union listing holdings for non-OCLC participant libraries. Some agents have assumed geographical responsibility, some represent consortia, and some union list for a specific type of library. Over the past 10 years the cooperating libraries and their heroic agents have included:

> Blue Mountain Community College, Tony Svetich; Chemeketa Community College, Paula Poole and Claudia Gillis; Deschutes County Library, Martha Pyle; Linfield College, Mary Margaret Benson; Oregon Health Sciences University, Patrice O'Donovan; Portland Community College, Berniece Owen and Birgit Wedel; Portland General Electric Company, Barb Buckley; Southwestern Oregon Community College, Mary Jane Fisher; Umatilla County Special Library District, Dea Nowell; Washington County Cooperative Library Service, Linda Lybecker, Mary Cutting, Angela Mei and Barbara O'Neill.

THE PRESENT, THE FUTURE

As of October 1998, there are 160 ORULS participant libraries, approximately 100,000 serial titles, and 250,000 holdings. ORULS data is in demand. Over 75 libraries have placed orders for the upcoming 11th microfiche edition, with inquiries from as far away as Guam.

What will be the next challenge for ORULS? Whatever it may be, past history indicates that through the partnership of Oregon libraries, the challenge will be met, and statewide union listing of serials in Oregon will continue.

ORULS is available on the web: http://www.osl. state.or.us/oslhome/orulshome.html

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