Response of the Oregon Library Association to the Oregon State Library Reorganization Plan

Dated October 25th, 2013

# Executive Summary

The Oregon State Library performs several vital functions to the library community – keeping us informed, saving us money, and providing advice and help. That said, we recognize that all libraries are changing and services must evolve to address changing needs and resources. Overall, the Oregon Library Association supports the transformation of the State Library. We would like to add our specific perspectives to the Reorganization Plan.

**Goals**

Our goals for the transformation process are improved access to information for state employees and for all Oregonians; improved access to Oregon’s history; preservation of the state’s records and history; leadership to help libraries serve all Oregonians; and robust service to the print disabled.

**Specific Comments**

Integrated online reference system. We recommend a better definition of what this means, identification of intended audiences, exploration of existing successful information portals, involvement of existing expertise within the Oregon library community, and adequate funding.

Storage and location of materials. Our primary concern is access: whichever agency or organization that retains material must adhere to best practices in digital delivery and public access.

Division of functions.

Documents: Again, our main concern is access. If federal documents are moved to the Archives from the State Library, we urge the adoption of policies that address the retention of valuable state publications. We also urge the State to provide adequate reference expertise within the Archives for utilization of federal documents.

Legal library resources: We support the Plan’s recommendation to use the unique expertise of the State Law Library to enhance access to legal information resources.

Oregon Center for the Book: We suggest that OLA consult with the State Library, about reassigning the various tasks and roles of the Center.

Oregon Historical Society: Again, our concern is access. We are very concerned about moving materials to a private non-profit organization with little accountability to the state, and relying on this private institution to provide robust access to the materials.

OSLIS: We encourage greater support for OSLIS, recognizing this takes increased funding.

Plinkit: The OLA Technology Roundtable will work with the State Library to address how to best assist the 50+ Oregon libraries currently using Plinkit with migration to other platforms.

Proposed Implementation Timeline. Our main concern about the aggressive timeline is the design and implementation of the integrated online information system.

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# Introduction

From the perspective of Oregon’s library community, the State Library performs several vital functions to our work, including maintaining the big picture of libraries statewide and contributing to our collective vision of where we can go in the future. State Library staff provide advice on local issues and help develop statewide objectives.  They keep us informed and knowledgeable, saving us time and money. The State Library helps level the playing field among libraries that are well funded locally, and those struggling financially. The State Library’s leadership helps us all deal with a wide variety of issues, from book challenges to funding cuts to changing user demographics.

That said, as librarians, we know that all libraries are changing, and that all of us, including the State Library, must evolve our services to address changing needs and resources. Overall, the Oregon Library Association supports the transformation of the State Library, but we want to ensure that our perspective is integrated into the implementation of the Reorganization Plan dated October 25, 2013 and its addendum of November 1. The following presents OLA’s perspective as synthesized by the Library Development and Legislation Committee under the guidance of its co-chairs, Janet Webster and Abigail Elder, and the OLA President, Penny Hummel.

## Goals of Transformation Process from the Perspective of the Oregon Library Association

At the end of the transformation, we anticipate the following:

* Improved access to government information for state employees and Oregonians;
* Improved access to information needed by state employees to manage wisely;
* Improved access to Oregon’s history;
* Thoughtful preservation of the state’s record and history;
* Leadership in assisting libraries to serve all Oregonians;
* Robust service to the print disabled.

To the OLA, this process is not about simply saving state money or increasing efficiency. It is about allowing each of the three agencies to fulfill their missions effectively through collaboration, responsive expertise and accountable actions. These agencies serve state government and Oregonians. As librarians, we are trained to prioritize user needs as paramount in any service design; consequently, we remind all to account for the diversity of relevant audiences (both internal and external) while moving forward.

## Agency and Organization Missions

The October 25th report begins by pointing out “there has been increasing overlap between the missions and responsibilities of the Oregon State Library, the State Archives, the Oregon Historical Society, and the State of Oregon Law Library.” The stated intent of the report is to describe “ the legislative proposal that should be used to reorganize, streamline, and clarify functions among these agencies.” The mission statements below are taken from the entities’ web sites. They are distinct and serve as a backdrop for the transformation process. We note that the Oregon Historical Society mission does not emphasize access to information as a core mission.

* **Archives Division:** “…houses and provides access to the permanently valuable records of Oregon government.”
* **State Library:** “…provide quality information services to Oregon state government; provide reading materials to blind and print-disabled Oregonians; and to provide leadership, grants, and other assistance to improve library service for all Oregonians.”
* **State Law Library:** “…the primary legal information resource for state government and offers access to the law for all Oregonians.”
* ​​**Oregon Historical Society:** “As the steward of Oregon’s history, the Oregon Historical Society educates, informs, and engages the public through collecting, preserving, and interpreting the past.”

## Elements NOT Addressed in This Response

There are many elements of the report that OLA agrees with in principle and in practice. We do not list those in the following, but are willing to work with the entities to shape and implement.

Note: The italicized text throughout this response is excerpts from the Reorganization Plan.

# Creation of an Integrated Online Reference System

*It will be the responsibility of the Department of Administrative Services (DAS) to facilitate the adoption and/or creation of an integrated reference system that provides one online location to search the materials (including subscriptions) available in all agencies*

*In order to optimize the effectiveness of this system, as many materials as possible need to become electronically accessible and available for online viewing.*

*DAS should explore providing electronic access and use the ORMS web Portal (WebDrawer) application.*

*Access to relevant information housed in ORMS should also be included and made available through this system. Additionally, this online system should provide access to all agency library materials (e.g., Department of Environmental Quality, Oregon Department of Transportation).*

*While the State Library will ultimately manage this combined reference system, it will be the responsibility of DAS to oversee the design and building of this database.*

**Excerpt from Sarah Miller’s Next Steps for Library Transformation Work**

*Develop a Portal Planning Team – representatives from OSL, OHS, Archives, State Law Library, and DAS – initial purpose of group will be to develop a scope for the system and alternatives for phasing that would become a policy option package that could be considered as part of agency budget requests.*

**OLA Perspective**

An “integrated online reference system” is a nebulous term and needs better definition. Confusion over terminology could lead to missteps and miscommunication. Is this an online catalog (e.g. inventory) of materials and documents in the three agencies’ and OHS’s collections or is it a portal to information resources housed in these agencies and organization? From various discussions, it appears to be the latter. That said, an integrated catalog system would be one piece of this project and the State Law Library with its recent implementation of a new, expandable integrated library system has initiated that. This is not a simple task and may need to have various phases. The best solution may not be a portal if the end goal is access to Oregon’s government information and history. Also, we do not see mention of the integration of the existing portal, *Libraries of Oregon*. This oversight needs to be corrected as we move forward.

We suggest the following steps for the Portal Planning Team:

* Identify and describe internal and external audiences for the “integrated online reference system” or portal. This would facilitate portal design in terms of content, facets, licensing, and interface.
* Explore existing successful information portals [t](http://www.clan.lib.nv.us/)t)hat allow access to complex information environments by a variety of users (e.g. Multnomah County Library (<https://multcolib.org/>) and the Nevada State Library and Archives (http://www.clan.lib.nv.us/).
* Engage existing expertise in information portal design from within the Oregon library community and beyond including contractual expertise.
* Anticipate the elements of a successful design and provide adequate funds to test, complete and implement the portal.

# Shared Client Services

*Where applicable, these agencies should re-evaluate their administrative needs and use as many shared client services as possible from DAS. Some of these services include HR, IT, Accounting, and payroll services.*

**OLA Perspective**

Centralizing administrative tasks makes sense unless the particular agency already does so (e.g. State Law Library through OJD and Archives). OLA would want to be assured that there is expertise in licensing accounting and grants administration within DAS. The LSTA grant program and the Ready-to-Read Grant Program are somewhat specialized in their administration.

# Storage & Location of Materials:

*In cases where the responsibility of certain materials will shift into a different organization, the newly responsible organization will have the authority to decide the appropriate physical location for these materials. …. However, when the materials are requested it will still remain the responsibility of the responsible organization to provide access to them.*

**OLA Perspective**

Materials purchased with state funds or acquired through the federal depository system should be readily accessible to the public. Print access needs to be an option given the limitations of some of the public’s connectivity and the lack of consistent digitization of print publications. Our primary concern is accessibility: whichever agency or organization that retains material must adhere to best practices in digital delivery and provide access free or at cost.

# Division of Functions (Documents)*:*

* ***Document Repository:*** *With the exception of legal documents, this function should remain with the Archives. All these materials should be electronically accessible and available through the Integrated Online Reference System.*
* ***Federal documents:*** *This function will shift to the state Archives.*
* ***Regional Federal Documents Depository:*** *The Archives will become responsible for determining the best method of collaboration.*
* ***Reference Assistance for Government Records:*** *All required state documents will be consolidated with the Archives.*

**OLA Perspective**

Traditionally, archives and libraries serve different purposes; one is a repository for records and documents while the later focuses on providing access to the information in those publications. We are concerned that documents may be discarded according to records management schedule that are valuable to the state’s history. We understand that Archives staff is aware of this need, but are not convinced that they also are equipped to preserve and then provide access to these valuable state publications. **We suggest development of additional collection policies within Archives that addresses the historical value and retention of state documents.**

Federal documents can be challenging in terms of collection and access requirements as well as expertise in utilizing them efficiently. **We suggest that Archives work closely with the libraries of Portland State University, Oregon State University and University of Oregon to develop and implement an effective plan for housing and maintaining Oregon’s regional federal depository collection. We also urge the State to provide adequate federal document reference expertise within the Archives if it is to move from the State Library.**

# Division of Functions (Legal library resources)*:*

* ***Legal Library Resource Services:*** *The SOLL must be authorized through statute to provide consulting services to county governments (including law libraries) and provide county law libraries with electronic legal resources.*
* ***Licensing Legal Resources:*** *Since the SOLL is the primary purchaser of electronic legal resources for all branches of Oregon State government, this will remain a function of the SOLL.*

**OLA Perspective**

We recognize the unique expertise of the State Law Library and support using that effectively. OLA has a policy goal of improving statewide access to legal information resources. This is not simple given current statute and funding. **We are interested in seeking ways to enhance access, especially in those counties with no or limited legal information resources.**

# Division of Functions (Oregon Center for the Book)*:*

* ***Oregon Center for the Book:*** *This resource is not extensively used and will be discontinued. The federal funds should be reallocated to areas of greater need, as determined by DAS in consultation with the State Library and the Oregon Library Association.*

**OLA Perspective**

Every state has a Center for the Book affiliate. There is no federal funding attached to the designation. The State Library has used LSTA funds to support the various functions of the Center. The program allows for centers to be located elsewhere but requires that the state library be closely involved. The Intellectual Freedom Clearinghouse is one function of particular interest to the library community. **We suggest that OLA consult with the State Library, about reassigning the various tasks and roles of the Center.**

# Division of Functions (Oregon Historical Society role):

* ***State Documents:*** *…any materials that are not government records and should be kept for historical purposes will then be moved to the Oregon Historical Society.*
* ***State History: …*** *any materials that are not government records and should be kept for historical purposes will then be moved to the Oregon Historical Society.*

**OLA Perspective**

The Oregon Historical Society is a private non-profit organization with little accountability to the State. It does not have a strong record of providing adequate free public access to its library and information resources. **We are very hesitant about moving materials to OHS and relying upon this private institution to preserve those materials and provide robust access. These concerns have been acknowledged in the November 1 addendum to the Reorganization Plan.**

# Division of Functions (OSLIS):

* ***Support for Local Libraries:*** *The State Library should supply ample support to local libraries through the various functions listed below:* 
  + ***Oregon School Library Information System (OSLIS):*** *The State Library should continue to maintain and provide access to OSLIS. The State Library gives K-12 teachers and students access to the statewide databases and subscriptions along with research tutorials and guides. The State Library should begin incorporating more OSLIS content and navigation earlier in its teacher trainings.*

**OLA Perspective**

We encourage greater support for OSLIS but recognize that this takes increased funding.

# Division of Functions (Plinkit)*:*

* ***Support for Local Libraries:*** *The State Library should supply ample support to local libraries through the various functions listed below:* 
  + ***PLINKIT:*** *This function should be discontinued since it is no longer a useful tool for the vast majority of local libraries.*

**OLA Perspective**

The OLA Technology Roundtable will work with the State Library to address how to best assist the 50+ Oregon libraries currently using Plinkit with migration to other platforms.

# Proposed Implementation Timeline

**OLA Perspective**

This is an aggressive timeline. In our varied experiences, a library system migration or information access system design takes considerable time and effort by dedicated staff. For example, the Orbis Cascades Alliance is currently migrating systems and while on a fast track, the process is taking over three years from planning to implementation. **We suggest proceeding efficiently but effectively, especially in the design and implementation of the “integrated online information system”.**