

**Table of Contents**

I. Introduction Page 1  
 II. Summary of Process Page 1  
 III. Summary Workgroup Recommendations Page 2  
 IV. Subcommittee Worksheets Page 6  
 V. Appendix Page 28

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**I. Introduction**

This report is the culmination of work conducted in the summer and fall of 2011, by the Workgroup on Libraries and Archives in Oregon State Government. This effort was in response to the charge contained in Budget Note #1 of Senate Bill 5521, which requested that the Oregon Governor’s Office, Secretary of State, and the Chief Justice to jointly develop options pertaining to the consolidation and improvement of library and archives services. Final recommendations shall be delivered to the Joint Committee on Ways and Means and the appropriate policy committee at the beginning of the February 2012 Legislative Session (see Appendix for full text of Budget Note #1).

The report is divided into five parts (I-V): the Summary of Process (II) outlines the procedure the Workgroup followed in its effort to reach findings and conclusions; Summary Workgroup Recommendations (III) containing an overview of the Workgroup recommendations; and Worksheets (IV) explaining, in detail each option and should be consulted to get a clear understanding of each option discussed and why or why not it was recommended. The final appendix includes meeting minutes, relevant historical context and visual aids, and additional explanatory remarks.

Note: County law libraries were not included in the scope of this workgroup

**II. Summary of Process**

The Workgroup on Libraries and Archives was comprised of three subcommittees: Archives and State Library Services, Law Library and State Library services, and Talking Book and Braille Services (TBABS). Following an initial organizational meeting, each subgroup respectively sought to draft options and recommendations for subsequent consideration by the full Workgroup. They first identified options for each of their assigned issue areas, listed pros and cons, and made recommendations as to which options to implement. The full Workgroup met three times – Monday September 26th, Monday November 21st and Monday January 9, 2012. A full list of meetings and minutes is in the appendix of this report.

The following table lists the three subgroups and participants; chairs are denoted in **bold**.

<i>Subgroup Name</i>	<i>Assignment from Budget Note</i>	<i>Members of Subgroup</i>
Subgroup on Archive and State Library Services	Consolidation of state archives services; Increased utilization of digital resources; Reduction of facility costs; Development of public/private partnerships for library, law library, and archive services; Leveraging additional federal grant funding for libraries and library services	Cathryn Bowie, State Law Library Jim Carbone, Department of Administrative Services (DAS) Sam Hall, State Library Board <b>Mary Beth Herkert, State Archives</b> Larry Landis, Oregon State University (OSU) Julie Pearson-Ruthven, Secretary of State Dugan Petty, DAS Jim Scheppke, State Library Duke Shepard, Governor’s Office

Subgroup on Law Library and State Library Services	Increased utilization of digital resources; Elimination of duplicative state subscriptions and subscriptions services across state agencies; Consolidation of services of the State Library, Higher Education libraries, and the State Law Library; Development of public/private partnerships for library, law library, and archive services	Thomas Balmer, Oregon Supreme Court John Borden, Legislative Fiscal Office (LFO) <b>Cathryn Bowie, State Law Library</b> Linda Gilbert, DAS Susan Grabe, Oregon Bar Association Mary Beth Herkert, State Archives Mary Ann Hyatt, University of Oregon (UO) Jim Scheppke, State Library Duke Shepard, Governor's Office
Subgroup on Talking Book and Braille Library Services	Development of a more cost-effective delivery of the Talking Books and Braille Services	John Borden, LFO Jim Carbone, DAS Sam Hall, State Library Board Mary Beth Herkert, State Archives Linda Mock, Commission for the Blind <b>Jim Scheppke, State Library</b> Duke Shepard, Governor's Office Art Stevenson, National Federation of the Blind of Oregon Susan Westin, State Library

### III. Summary Workgroup Recommendations

The Workgroup on Libraries and Archives in Oregon State Government makes the following recommendations on the consolidation and improvement of library and archives services. The recommendations are presented under the headings (A-H) as they appear in Budget Note #1 in Senate bill 5521. Each heading contains recommendations brought forth by the subgroups and corresponds to a detailed worksheet in Part IV of this report. Also noted in italics are additional options that were carefully considered but not being recommended by the Workgroup at this time.

#### A) Consolidation of State Archives Services – Page 6

##### **Subgroup Archives and State Library Services**

1. Consolidate the State Library's state documents repository with the Oregon State Archives holdings  
Initially, current state documents in electronic form can be put into the statewide electronic management system known as the Oregon Records Management Solution (ORMS). Access can be provided to the public and government agencies through its web portal called WebDrawer. Eventually the non-electronic publications held by both agencies will be scanned and put into ORMS as well. This will allow us to eliminate any duplication between the institutions and the confusion that exists as to who is responsible for maintaining and providing access to this information.
2. Consolidate reference services of the State Archives and State Library  
This would be a long-term goal. The overall merger would be long term however the group did agree that there needs to be better collaboration of Reference Services and to take advantage of technology to provide better customer service such as the common web portal.
3. Consolidate Web Presence  
The group agreed that there needs to be development of a web portal that allows patrons to be services from either website.

*Options discussed but not recommended at this time:*

*Consolidate the Oregon State Library or Government Research Services with the Secretary of State*  
The group also discussed consolidating the State Library with the State Archives under the Secretary of State but at this time determined that further cost-benefit analysis would need to be done; major issues between agencies would need to be addressed. Please refer to worksheets (Page 4 – A. Consolidation of State Archives Services).

B) Increased Utilization of Digital Resources – Page 10

**Subgroup on Archives and State Library services**

4. Collaboration on the digitization of historical collections  
We agreed that this is something that we need to pursue. We would need to find a funding source to do legacy documents of both the Archives and the Library and would work together to pursue funds and partnerships to defray the costs of digitization.

**Subgroup on State Law Library and State Library services**

5. Continue to look for digital alternatives to high cost print versions  
The Workgroup agreed that this option needs to be pursued as it will make information more accessible to its patrons.
6. Collaboration on the digitization of unique resources at the State Law Library and State Library  
We agreed that this is something that we need to pursue to eliminate duplication and maximize access.
7. Collaborate on Proxy Service  
The Workgroup agreed that savings could be realized if licensing issues are worked out to share the proxy service that is already in use at the State Library. In addition, this would allow researchers to access both collections from a single website.

**Both**

8. Collaborate with the Oregon University System or Orbis Cascade Alliance on becoming members and licensing of research databases  
The Workgroup recommends that this should be pursued however neither the State Library or State Archives qualify for full membership and certain services are not available to the public, thus eliminating certain State Archives users; these issues would need to be resolved prior to moving forward on this.

C) Elimination of the duplicative State subscriptions and subscription services across state agencies – Page 13

**Subgroup on State Law Library and State Library services**

9. Require agencies, by Oregon Department of Administrative Services (DAS) rule, to consult with the State of Oregon Law Library and the State Library Government Research Services before purchasing information resources  
The Workgroup makes this recommendation in order to create a centralized clearing house for publication and licensing, increasing efficiency and therefore reducing duplication of costs.
10. Formalize the consultative process between the State of Oregon Law Library and Government Research Services  
The Workgroup recommends formalizing a process that has been in place between the two libraries to eliminate unnecessary duplication of services.

D) Reduction of library facilities costs – Page 14

**Subgroup Archives and State Library services**

11. Require agencies to use the State Records Center  
The Workgroup acknowledges that the State Records Center provides the lowest cost option for state agencies to store their records according to state records retention schedules.
12. Vacate one of four stack tiers at the State Library by 2015  
The Workgroup recommends that the State Library should pursue this option by continuing their current project to inventory and weed their collection.
13. Utilize compact shelving at the State Archives  
The Workgroup recommends this option although long term due to the cost associated with the move to compact shelving. In addition, a cost-benefit analysis should be done to see what the savings would be to move the State Library collections to the State Archives.
14. Consolidate the State Library and State Archives reference rooms  
The Workgroup recommends this option as a long term option contingent upon the move to compact shelving at State Archives and outcome of a cost-benefit analysis.

*Options discussed but not recommended at this time:  
Privatization of the State Records Center*

E) Consolidation of services of the State Library, Higher Education libraries, and the State Law Library – Page 16

**Subgroup on State Law Library and State Library services**

15. Consolidate the web presence of the Government Research Services and the State Law Library  
The Workgroup agreed that a consolidated web presence would provide a single point of entry and guide the user to the appropriate collections and materials

*Options discussed but not recommended at this time:*

*Consolidate the State Library's Government Research Services and the State Law Library*

F) Development of public/private partnerships for Library, Law Library and Archives services – Page 17

**Subgroup on Archives and State Library services**

16. Look for collaborative public/private partnerships for Library and Archives  
The Workgroup recognizes that this is something both the Archives and State Library currently do and recommends they continue their efforts. A list of current partnerships can be found on the worksheets (x).
17. Pursue intergovernmental agreement with the State of Washington for digital preservation  
The Workgroup agreed to pursue this and the Archives has secured a federal grant to do a feasibility study on this topic.
18. Pursue active engagement with the Atkinson Graduate School of Management at Willamette University and other higher education institutions for interns  
The Workgroup recognizes that both the Library and Archives have begun working on this option and that efforts should continue to create a program that benefits agencies as well as students

**Subgroup on Law Library and State Library services**

19. Evaluate Ancestry.com partnership for possible expansion to other libraries and archives  
The Workgroup agreed that the Law Library should examine its holdings to see if there is any information that Ancestry.com may be interested in.

*Options discussed but not recommended at this time:*

*Outsource State Law Library and Government Research Services to Willamette University Libraries*

G) Development of a more cost-effective delivery of the Talking Books and Braille Services (TBABS) – Page 21

**Subgroup on Talking Book and Braille Library Services**

20. Work with the Library of Congress to retrofit the digital talking book players for self-service wireless delivery (similar to Kindle) by 2015  
The Library of Congress should develop a business case to replace mailing digital talking books with a wireless delivery system that is likely to be much less expensive than mailing. There would be a significant startup investment to retrofit the players TBABS already has in the field and to procure a wireless delivery system, but once these investments were made, long term postage cost savings for the Federal government and long term labor cost savings for regional libraries would be substantial compared to mail delivery. For more information see Appendix V (3) *How TBABS Customers Will Borrow Their Books*
21. Encourage the Library of Congress to enable all types of consumer devices to play digital talking books  
Many consumer devices such as smartphones, MP3 players and tablet computers are becoming more adaptive for the blind. TBABS could improve its customer service by not limiting customers to using the NLS digital talking book player to listen to their books. The TBABS program would have more appeal for younger people if they could listen to their talking books on their smart phone, MP3 player, or tablet computer. For more information see Appendix V (3) *How TBABS Customers Will Borrow Their Books*
22. Move to a regional (multi-state) model for the delivery of TBABS by 2015  
As technology changes, scaling up talking book services to a regional level may make business sense. This might be the case, in particular, if the technology evolves to a wireless delivery model (see Recommendation #20). The State Library should be discussing this as a possible long term direction with other states in our region (e.g., Alaska, Washington, Idaho, and Montana) and at some point

- conduct an investigation to see if a sound business case exists for regional library service for the blind and print disabled.
23. Introduce TBABS to all Oregon children who might benefit from the service using the Individualized Family Service Plan/Individual Education Plan process  
Only about a quarter of children who are blind or have other visual impairments are using TBABS. Children with other disabilities like dyslexia that might qualify them for TBABS service also are not talking advantage of the program in any significant numbers. The State Library needs a stronger partnership with the Oregon Department of Education, the Education Service Districts and local school districts to sign up more eligible Oregon children for TBABS using the Individualized Family Service Plan/Individual Education Plan process.
  24. Aggressively promote BARD to all TBABS customers to reduce mailing of digital talking books  
About 20% of TBABS customers are currently registered to use BARD to download their own talking books. If we could push that percentage higher, say, closer to 50%, that would be a big labor savings and allow TBABS to serve more customers.
  25. Move to hosted open source integrated library system from the current commercial system  
Recently the State Library became a partner in a planning grant awarded by the Institute of Museum and Library Services to the state library in Georgia to develop the specifications for a new open source integrated library system to operate regional libraries for the blind. The grant for \$97,843 will convene a planning committee to produce a set of core functional requirements for a new open source integrated library system for regional libraries for the blind. TBABS should fully participate in this planning effort in hopes that a more capable open source integrated library system could be developed that would cost less to operate and could be remotely hosted, saving IT staff time and IT capacity at the State Library.

*Options discussed but not recommended at this time:*

*End the Cassette Program for this biennium*

*Phase out mailing digital talking books in the near term and require all customers to download their own books using BARD*

*Consolidate the TBABS program with the Oregon Commission for the Blind*

*Cease duplicating digital talking books on demand*

*Phase out providing digital talking book players to customers in favor of other devices they could purchase*

*Discontinue TBABS and provide library service to blind and print disabled Oregonians from local public libraries*

*Move to a self-service model that eliminates the ability to consult with staff about book selections*

*Limit TBABS to the senior market*

#### H) Leveraging of additional federal grant funding for libraries and library services – Page 26

##### **Subgroup on Archives and State Library services**

26. Encourage and support heritage organizations to obtain federal grants  
The Workgroup recommends this option using the recommendations outlined in HB 2859 from the 2011 Legislative Session requiring the State Library, State Archives, Heritage Commission and State Historical Records Advisory Board to look at ways to bring more grants duning to Oregon's heritage institutions. The Workgroup also recommends looking at the current granting process to see if it can be streamlined.
27. Work with the Oregon Congressional delegation to preserve funding for Oregon State libraries and Archives  
The Workgroup recommends that the State Library and State Archives develop a process for doing this most effectively.

#### **IV. Worksheets**

The following templates reflect each subgroup's process and recommendations.

- A) Consolidation of State Archives Services – Page 6
- B) Increased Utilization of Digital Resources – Page 10
- C) Elimination of the duplicative State subscriptions and subscription services across state agencies – Page 13
- D) Reduction of library facility costs – Page 14
- E) Consolidation of services of the State Library, Higher Education libraries, and the State Law Library – Page 16
- F) Development of Public/Private Partnerships for Library, Law Library, and Archives Services – Page 17
- G) Development of a More Cost-Effective Delivery of the Talking Book and Braille Services – Page 21
- H) Leveraging Additional Federal Grant Funding for Libraries and Library Services – Page 26

#### **A) Consolidation of State Archives Services**

Subgroup Name:	<u>Subgroup on Archives and State Library Services</u>
Issue:	<u>Consolidation of State Archives Services</u>
Chair:	<u>Mary Beth Herkert, State Archivist</u>

##### *Summary Description of the Current Situation*

The Archives Division was established in 1945, to house and provide access to the permanently valuable records of Oregon government and to authorize the disposition of public records from all of Oregon's governmental entities. The Archives Division is the state's information broker and information manager and we strive to make as much government information available to the public whether by accessing this information in a traditional manner - looking at physically, tangible records at the Archives Building, using the Oregon Blue Book or Administrative Rules or by using our website to access the ever growing amount of information or records added on a daily basis. In addition, the Division works with every state agency and political subdivision to help them manage information, regardless of its physical form or characteristics, from creation until final disposition, helping to ensure the citizens of Oregon that their government is open and accountable. The Archives Division operates under the authority of ORS 192.001-192.170; ORS 357.805-357.895; ORS 171.407, 171.420-171.430; ORS 177.120; and ORS 183.325-183.362.

The work that the Archives Division performs centers around making government information accessible and ensuring that it is managed in the most efficient manner possible. We do this with a staff of 21.5 full time employees representing Reference, Records Management and Publications. These program areas provide a wide variety of services to a very diverse customer base made up of the general public, elected officials, private sector businesses and the over 3000 state agencies and political subdivisions and include:

Making the permanently valuable records of Oregon government available via the web, in person, by mail or by phone so that the customer can trace their family's roots, establish a property line, determine the intent of a particular law or statute or look and see how a particular event in history affected Oregonians.

Providing state agencies and political subdivisions with advice and assistance on a variety of public records issues and write retention and disposition schedules helping to ensure that agencies manage their public records in the most effective and efficient way possible. In addition, our customers also rely on the Records Managers to interpret and explain new laws and federal mandates such as the Laws on Civil Procedure and how they affect their records and ultimate disposition.

Developing and managing a statewide electronic records management system that will allow the tiniest of special districts to the largest state agencies, the ability to manage their information from creation until final disposition in a single system that makes the management of public records systematic and routine in the most cost effective manner possible.

Creating standards and updating laws to ensure that the use of technology will not compromise the accessibility of public records.

Operating facilities, such as the State Records Center, allowing for inexpensive storage of state records until they have met their authorized retention.

Receiving and publishing Administrative Rules from state agencies and boards and commissions. Any changes to the Administrative Rules are published monthly and annually ensuring that agencies and citizens alike have access to the most current rules. In addition, we are also responsible for updating and publishing the Oregon Blue Book.

Accepting for filing the State's Official Documents; and Administering the State Historical Records Advisory

Board which in turn works with all of the state’s historical societies, museums and archives to provide advice and assistance, train and assist with the federal granting process.

The Reference Unit acts as the state’s information broker by providing access to the permanent records of Oregon’s government and by directing the public to the proper agency for records that are more current. Our customer base is diverse and so are the records that they access. Reference services are driven by a demand for information which is a combination of customer need and awareness of available services. We create demand by showcasing our holdings on the web. All of the Reference Unit’s activities are designed to promote government transparency.

The Records Management Unit is the state’s information manager. They do this by providing the state’s 3000 plus governmental agencies with advice and assistance, training, records retention schedules, technology standards and now a statewide electronic records management system for all of Oregon government to use. Their goal is to have agencies only keep information for as long it is necessary to conduct the public’s business and to keep that information accessible to the public from creation until final disposition. The Records Management Unit also operates the State Records Center and Security Copy Depository.

Today’s Oregon State Library was established in 1905, as the Oregon Library Commission with the primary mission of establishing public and school libraries throughout the state. In 1907, the Commission began to collect the publications of state government agencies (called “state documents”), and to serve as a reference library for state government. What was then known as the Oregon State Library was operating in the Judicial Branch as a law library for the courts. In 1913, the Legislature sought to clarify the roles of the two library agencies. In a move that still creates historical confusion today, they changed the name of the State Library to the Supreme Court Library and conferred the name Oregon State Library on what had been the Oregon Library Commission. The mission of the new Oregon State Library would be to continue to develop local library services and to meet the general library and information needs of state government, including the collection and preservation of all the publications of state government. The new State Library was given custody of all general books and periodicals, and state and federal documents that had previously been housed in the old State Library.

The records and archives of state government were handled in various ways before the appointment of the first State Archivist in 1946. In 1945, the Legislature authorized the hiring of a State Archivist and the creation of the first State Archives within the State Library. In 1973, the State Archives were moved out of the State Library and into the Secretary of State’s agency. The Secretary of State was deemed the public records administrator for the state and was directed to “obtain and maintain uniformity in the application, operation and interpretation of public records laws.”

The State Library continued to serve as the depository for the publications of state government, continuing the mission begun in 1907. All state agencies were required by statute to deposit multiple copies of their publications with the State Library. The State Library cataloged the documents and sent copies to a network of public and academic libraries throughout the state in an effort to make state government publications more accessible to Oregonians. In 2005, the Legislature revised the laws regarding the collection and preservation of state publications to bring them into the digital age. Under the new statutes all state agencies now must provide a digital copy of all their publications to the State Library for inclusion in the new Oregon Documents Repository. In this way publications that are no longer printed can still be collected and maintained for permanent public access.

The mission of the Government Research Services team at the State Library is to provide quality information services to Oregon state government. This includes answering research questions for state employees, providing permanent public access and depository services for state government publications and answering public inquiries about Oregon government, history and culture.

The State Library has over 50,000 titles and over 200,000 individual documents in its entire Oregon document collection. OSL added approximately 12,000 items to its document collection in the 2009 – 2011 biennium. Many of these are new issues/editions of serially published titles. Over two-thirds of the additions were digital documents.

The State Archives and the Library’s Government Research Services team did a recent comparison of a random sample of 1,000 state document titles from the State Library collection with the holdings of the Archives and showed an overlap of only 4%.

*Options Considered by the Subgroup*

<b>Option #1: Consolidate Government Documents Repository with Archives Holdings</b>	
<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• Increased efficiency</li> <li>• Uniform integrated workflow</li> </ul>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• Resolve statutory conflict about publications</li> <li>• Potential increased cost for licensing in the</li> </ul>

<ul style="list-style-type: none"> <li>• Potential cost savings in Administrative Staff</li> <li>• Technology already available</li> </ul>	<p>Oregon Records Management Solution – currently \$37.02 per user per month and scheduled to drop as the number of users increases.</p>
<p><b>Option #2: Consolidate State Library or Government Research Services with Secretary of State</b></p>	
<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• Would put Library under public records administrator</li> <li>• Potential administrative savings</li> </ul>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• Funding sources are different</li> <li>• State Library is represented; Secretary of State is not</li> <li>• State Library is a Dept. of Administrative Services agency and Secretary of State is not</li> <li>• State Library has programs unrelated to public records</li> <li>• Constituents value citizen governance</li> </ul>
<p><b>Option #3: Consolidate Web Presence</b></p>	
<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• One-stop shopping</li> <li>• Citizen-friendly</li> <li>• Develop web portal</li> </ul>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• Branding issues</li> <li>• Two separate Content Management Systems now</li> <li>• Size of Archives website</li> </ul>
<p><b>Option #4: Consolidate Reference Services</b></p>	
<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• Could find ways to improve customer service through greater cooperation using new technology</li> </ul>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• Two separate facilities would present challenges to merge</li> <li>• Have been separate since Archives was established in 1946</li> <li>• Staff have different competencies</li> </ul>

*Recommendation of the Subgroup*

**Option #1: Consolidate Government Documents Repository with Archives Holdings**

The State Library is statutorily responsible for providing access to government publications. In the past, when these publications were predominately paper, the definition of what needed to go to the State Library as a ‘government document’ was extremely broad. In the meantime, the State Archives is tasked with managing the state’s public records from creation until final disposition. These public records include publications created by state and local government entities in Oregon. The problem with the current situation is two-fold:

1. Although there is minimal duplication based on a recent survey done by the Archives and State Library – a 4% overlap – a problem exists in that the State Library is statutorily charged with providing ‘permanent’ access to these publications (state documents) while the State Archives Division is statutorily charged with setting retentions for all public records in Oregon. Because of this, two agencies are statutorily responsible for the same records and in many cases, the Archives has set a retention period at something less than permanent for these publications which means the publications in the Library’s Government Documents Repository have not been deemed to have historical value and must be destroyed by the creating agency according to their retention schedule. Achieving a statutory solution that addresses this issue needs to be found.
2. The second problem is that actual public records (not publications) such as minutes or traffic citations can be kept as government documents merely because they are bound. Further collaboration between the State Library and State Archives on resolving these situations is a project worth pursuing and being resolved.

The group discussed the history and developed a list of pros and cons. During the discussion it was noted that the majority of the current publications that the Government Documents Repository receives are in electronic form. Therefore the group decided that this is an area where the workflow should be consolidated. The current records in electronic format can be put into the statewide electronic records management system known as the Oregon Records Management Solution (ORMS) to be managed and access can be served to the public and government agencies through its web portal called WebDrawer. The group also agreed that we should look into scanning the non-electronic publications held by at both agencies and putting them into ORMS as well. This would allow us to eliminate the limited duplication between the institutions and the confusion that exists as to whom is responsible for maintaining and providing access to this information.

**Option #2: Consolidate State Library or Government Research Services with Secretary of State**

When the State Archives was created in 1946, it was placed under the State Library. Even though the Archives was administratively part of the State Library, their duties were distinctly separate. By 1973, the Legislature felt that

because of the Archives statutory responsibilities for managing and preserving public records, it would better fit under the Public Records Administrator which is the Secretary of State. Since 1973, the State Archives has been part of the Secretary of State's Agency.

As we went through our lists of pros and cons, we found the cons to be more prevalent and they would need to be addressed before this option could be implemented. What we did agree to is a need to address administrative savings to see what the immediate value of merging all or part of the State Library with the Secretary of State could be. The Secretary of State's Business Services Division has taken a preliminary look at potential savings from sharing administrative staff (i.e. payroll, personnel, and business operations) and estimates a potential \$1,000,000 savings for a biennium. We agreed that a more, in-depth look at budgetary savings needed to be done. Of the cons, the three that we agreed would be the biggest hurdles at this time are: (1) our funding sources are different (State Library is an assessment agency and the Secretary of State is predominately General and Other Funds); (2) the Library is a Department of Administrative Services agency, thus under Governor and the Secretary of State is not; and (3) the State Library is represented (Union) and the Secretary of State is not. The group felt that these issues would need to be resolved before the agencies could be merged together. Therefore, the majority felt that this would not be a recommended option at this time.

***Option #3: Consolidate Web Presence***

Because the majority of communications for the Archives and State Library are done electronically, we explored the idea of consolidating our web presence to make it easier for patrons to find the information that they are looking for. We all agreed that the pros far outweigh the con and that the Information Services staff for the State Library and the State Archives will look into the development of a web portal that would allow patrons to be serviced from either website.

***Option #4: Consolidate Reference Services***

Both the State Archives and State Library provide Reference Services. The State Library provides these services mostly to and on behalf of state agencies and their employees, while the State Archives provides services not only to state and local government agencies but to the general public as well. Archives Reference Services focuses on providing access to original records created by state and local government agencies. Although the Archives Division has some limited secondary sources (i.e. books), reference activities focus on providing access to the historical records of Oregon's governmental entities. The State Library provides access to secondary sources, acts as a lending institution and answers reference questions for state employees found in other secondary resources.

The majority of the group felt that if this consolidation were to occur, it would have to be a long-term goal since the services currently provided are too far apart due in large part to the different competencies and trainings of archivists and librarians. Another consideration was that there are currently two facilities that would be difficult to merge at this time (see also Reduction of Library Facilities Costs). However, the group did agree that there needs to be better collaboration of Reference Services and to take advantage of technology to provide better customer service such as a common web portal.

**B) Increased utilization of digital resources**

Subgroup Name:	Subgroup on Archives and State Library Services
Issue:	Increased Utilization of Digital Resources
Chair:	Mary Beth Herkert, State Archivist

*Summary Description of the Current Situation*

The Archives Division has been committed to using technology for providing access to our holdings since we became the first Archives in the world to join the Worldwide Web in 1993, when it was primarily a tool for colleges and universities to share information. Currently, the Archives Divisions website is the largest in state government with over 87,000 pages that reflect our mission to make government accessible and transparent. We continue to focus on increasing the amount of information readily accessible to patrons online and will be pushing more information out using WebDrawer, the web portal that is part of the statewide electronic records management system. In addition, the Archives Division has three searchable databases available on its website for researchers: Early Oregonians – a list of all inhabitants in Oregon up through 1860; the Historic Names – list of individuals found in our holdings; and the Trademarks which include images of historic trademarks registered in Oregon. The Archives website also includes numerous exhibits which showcase our holdings related to certain topics.

In addition, the State Library is also looking to automate more of its information and resources to make their holdings more accessible to their patrons. They currently hold licenses to access approximately fifty databases down from a high of seventy in 2009-2011. The current electronic resources budget is \$240,000 down from a peak of almost \$400,000. The reductions are due to budget cuts.

At the same time, State Library patrons are using these resources at an increasing rate. Below are the figures for the past five years:  
 Fiscal Year 2007: 31,972  
 Fiscal Year 2008: 57,174  
 Fiscal Year 2009: 56,025  
 Fiscal Year 2010: 56,195  
 Fiscal Year 2011: 59,101  
 Average Daily visits to the State Employee Information Center web portal are also up 27% since 2009.

The State Library also maintains the Oregon Documents Repository, providing online access to and archiving digital versions of the publications from state government agencies. This repository includes over 40,000 items and grows by more than 5000 items per year.

*Options Considered by the Subgroup*

<b>Option #1: Collaboration on Digitization of Historical Collections</b>	
<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• Long term facilities cost savings</li> <li>• Improves access for users</li> <li>• Grant funds might be available</li> <li>• Partnerships may be available</li> <li>• Improves preservation of originals</li> <li>• Potential to collaborate with ORBIS Cascade Alliance</li> </ul>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• Digitization is expensive</li> <li>• Archives funding model</li> </ul>
<b>Option #2: Consolidate Web Presence of the Library and Archives for Public Access</b>	
<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• Done as part of <b>Consolidation of State Archives Services – Option 3</b></li> </ul>	<p><i>Cons</i></p>
<b>Option #3: Collaborate with Oregon University System or ORBIS/Cascade on Licensing Research Databases</b>	
<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• Potential cost savings – see Law Library</li> </ul>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• Archives and Library currently does not qualify for membership in ORBIS Cascade</li> </ul>

*Recommendation of the Subgroup*

**Option #1: Collaboration on Digitization of Historical Collections**

The subcommittee agreed that by making more information available electronically we would better be able to serve our patrons in a more efficient manner. The Archives Division is part of the Oregon Records Management Solution and the emphasis of that endeavor is not only to manage the state's information from creation until final disposition, but to also make the state's information more readily available to the public regardless of its scheduled retention period. As for the paper records in the Archives, a funding source would have to be secured in order to digitize the records as a whole. Currently records are digitized upon request. However, one of the cons of digitizing historical records for the Archives is that it currently purchases all of its supplies and services from the copies that they sell of historic records; therefore they walk a fine line between making more information available and risking their funding source.

We talked about incorporating the information managed by the State Library's Government Research Services and in particular, the publications found in the Oregon Documents Repository. This can be easily done for the publications that they receive electronically but we would need to digitize the 'historical' backlog. The cons of any digitization process are its costs.

The group agreed that long term there would be facilities savings and that pursuing grant funds and partnerships would help defray the costs of digitization. Ultimately, the group agreed that this was an option worth pursuing due to the increase access to public records and information.

**Option #2: Consolidate Web Presence of the Library and Archives for Public Access**

Because the majority of communications for the Archives and State Library are done electronically, we explored the idea of consolidating our web presence to make it easier for patrons to find the information that they are looking for. Despite the fact that there are some significant hurdles to overcome to make it happen, we all agreed that the pros far outweigh the cons. We agreed that the Information Services staff for the State Library and the State Archives need to look into the development of a web portal that would allow patrons to be serviced from either website. **See also Consolidation of State Archives Services – Option 3**

**Option #3: Collaborate with Oregon University System or ORBIS/Cascade on Licensing Research Databases**

This option was more thoroughly discussed by the Law Libraries Subcommittee. However, it was agreed by this subcommittee that this was something that we need to pursue. The State Library has tried in the past to join ORBIS/Cascade but was denied because they were not an academic library and the Archives Division is not a library. We feel that it is worth the effort to meet with the membership of ORBIS/Cascade to see if they would consider our membership because of the information that we currently maintain and manage.

Subgroup Name:	Subgroup on Law Library and State Library Services
Issue:	<b>b) Increased utilization of digital resources</b>
Chair:	Cathryn Bowie, Acting State Law Librarian

*Summary Description of the Current Situation*

The State of Oregon Law Library

SOLL licenses with approximately 10 vendors for specially purposed legal resources. The majority of the licenses are not enterprise wide. Most are limited to narrow user groups within state agencies and departments. Last year's electronic resources expenditures were \$234,731., down approximately %22 from previous year. The Law Library is currently conducting a feasibility analysis on all print resources. The Law Library's goal is to provide the most efficient and cost-effective access to information with a preference for electronic versions.

State Library – Government Research Services

OSL licenses access to approximately 50 databases. This is down from almost 70 at the start of the 2009 – 11 biennium due to budget reductions. The current electronic resources budget is \$240,000 for 2011 – 13. This is down from a peak of almost \$400,000.

At the same time, State Library patrons are using these resources at an increasing rate

ACCESS TO E-RESOURCES

- FY07: 31,972
- FY08: 57,174

- FY09: 56,025
- FY10: 56,195
- FY11: 59,101

Average daily visits to the State Employee Information Center web portal are also up 27% from 2009.

OSL also maintains the Oregon Documents Repository, providing online access to and archiving of digital versions of the publications of state government agencies. This repository currently includes over 40,000 items and grows by more than 5,000 items per year.

*Options Considered by the Subgroup*

<i>Option #1: Continue to look for digital alternatives to high cost print versions.</i>	
<i>Pros</i>	<i>Cons</i>
<ol style="list-style-type: none"> <li>1. Saves money</li> <li>2. Reaches more simultaneous users</li> <li>3. Price volatility of print</li> <li>4. Faster updates</li> </ol>	<ol style="list-style-type: none"> <li>1. Some resources are difficult to use online</li> <li>2. Potential to lose to lose historical content.</li> <li>3. Price volatility of digital</li> <li>4. Content variations in print and digital (not all print content converted to digital)</li> </ol>
<i>Option #2: Digitize unique resources at State Law Library and State Library.</i>	
<i>Pros</i>	<i>Cons</i>
<ol style="list-style-type: none"> <li>1. Increases access to resources</li> <li>2. Preserves fragile materials</li> <li>3. Can share presentation software</li> <li>4. Cost recovery potential</li> </ol>	<ol style="list-style-type: none"> <li>1. Staff intensive to digitize</li> <li>2. Presentation software is expensive</li> </ol>
<ol style="list-style-type: none"> <li>1. <i>Option #3: Collaborate on Proxy Service.</i> (A proxy server prevents unauthorized use of library resources. In an enterprise that uses the Internet, a proxy server acts as an intermediary between a workstation user and the Internet to ensure security, and administrative and authentication control. OSL's GRS owns a proxy server, SOLL does not.)</li> </ol>	
<i>Pros</i>	<i>Cons</i>
<ol style="list-style-type: none"> <li>1. Leverages existing OSL resources</li> <li>2. Contributes to shared web presence</li> </ol>	<ol style="list-style-type: none"> <li>1. Need to work out licensing issues</li> </ol>

*Recommendation of the Subgroup*

**Option #1: Continue to look for digital alternatives to high cost print versions.** Recommendation of Subgroup is yes. Digital format is the future. Accessibility from desktops is the major benefit of digital resources. It reduces physical space requirements. Print and digital resource costs are rising, but there is more potential for inflation of print. Discussion included the fact that libraries are in a transition period from print to digital format and careful selection of content was essential. All resources are not available in electronic format, and just because a resource is available electronically does not mean it is a more useful product. Comments included that not all print content was carried over to the digital version and some print products were better organized and easier to use.

**Option #2: Digitize unique resources at State Law Library and State Library.**

Recommendation of Subgroup is yes. Pros outweigh cons. Preservation of materials and increased access are the greatest benefits. There is also potential to recover some costs by charging for copies. Another benefit is technical staff expertise and resources could be shared between the two libraries.

**Option #3: Collaborate on Proxy Service.**

Recommendation of Subgroup is yes. Pros outweigh cons. Currently, the State Law Library does not own a proxy server that is used for access control to digital resources. There could be potential savings if licensing issues could be worked out. An additional benefit would allow researchers access to both collections from a shared web site.

**C) Elimination of the duplicative State subscriptions and subscription services across state agencies**

Subgroup Name:	Subgroup on Law Library and State Library Services
Issue:	<b>c) Elimination of the duplicative state subscriptions and subscription services across state agencies</b>
Chair:	Cathryn Bowie, Acting State Law Librarian

*Summary Description of the Current Situation*

<p><u>The State of Oregon Law Library</u> SOLL licenses with approximately 10 vendors for specially purposed legal resources. The majority of the licenses are not enterprise wide. Most are limited to narrow user groups within state agencies and departments. Last year's electronic resources expenditures were \$234,731., down approximately %22 from previous year.</p> <p><u>State Library – Government Research Services</u> OSL licenses access to approximately 50 databases. This is down from almost 70 at the start of the 2009 – 11 biennium due to budget reductions. The current electronic resources budget is \$240,000 for 2011 – 13. This is down from a peak of almost \$400,000.</p> <p>We are looking closely at redundancies across agencies. A quick analysis of the transparency data for FY2010 show over \$2,300,000 in “Dues and Subscriptions” spent across state government (excluding OSL, OJD, and ODOT, all of which operate libraries). While many of these charges are for membership in professional organizations, a cursory examination indicates that there are several vendors in common across agencies and between OSL and other agencies.</p>
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*Options Considered by the Subgroup*

<i>Option #1: Require agencies (by DAS rule) to consult with the law library and the State Library Government Research Services before purchasing information resources.</i>	
<p><i>Pros</i></p> <ol style="list-style-type: none"> <li>1. Eliminate duplication</li> <li>2. Cost savings</li> <li>3. Outreach opportunity for libraries</li> </ol>	<p><i>Cons</i></p> <ol style="list-style-type: none"> <li>1. Process could be unwieldy (would need dollar threshold)</li> </ol>
<i>Option #2: Formalize consultative process between Law Library and Government Research Services.</i>	
<p><i>Pros</i></p> <ol style="list-style-type: none"> <li>1. Provides better customer services</li> <li>2. Ensures continuity through personnel changes</li> </ol>	<p><i>Cons</i></p>

*Recommendation of the Subgroup*

<p><b>Option #1: Require agencies (by DAS rule) to consult with the law library and the State Library Government Research Services before purchasing information resources.</b> Recommendation of Subgroup is yes. This would create a more centralized clearinghouse for database and publication licensing and would increase efficiency and reduce costs. Preliminary review showed duplication of resources within state agencies. In addition to reduced costs, this would create awareness of current subscriptions already available through the State Law Library and the State Library.</p> <p><b>Option #2: Formalize consultative process between Law Library and Government Research Services.</b> Recommendation of Subgroup is yes. This seemed to be an obvious extension of the request for state agencies to consult with the libraries before purchasing information resources. An informal process has been in place between the two libraries, but formalizing would create continuity through staff changes.</p>
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**D) Reduction of library facility costs**

Subgroup Name:	Subgroup on Archive and State Library Services
Issue:	Reduction of facilities costs
Chair:	Mary Beth Herkert, State Archivist

*Summary Description of the Current Situation*

The State Archives and State Library currently occupy buildings that were specifically designed and built for their specific needs.

The State Library’s Government Research Services team rents approximately 25,000 feet of stack space (on four tiers) to house its collections. For the most part, the stack areas **are not** temperature and humidity controlled. In addition, the team leases:

- Office space for 21 staff and the manager;
- Workroom space for book repair and digitization;
- The Oregon Index Alcove; and
- The Reference Room, including Genealogy materials and the Oregon Poetry Collection.

The cost of this space was \$950,000 for 2009–2011 and is budgeted at \$975,000 for 2011–2013. The impact of facilities costs as a percentage of overall Services and Supplies has gone from approximately 40% in 2003–2005 to 56% in 2011–2013.

The Government Research Services team is working on a fairly aggressive inventory and weeding of periodicals and a project to inventory and weed a large collection on Tier 4. These projects will be completed in 2013, and may allow for the consolidation of the collection onto three tiers.

The State Archives currently occupies 41,926 square feet at the State Archives Building, of which 41,488 is stacks, office space and common area and 438 square feet is storage space for 18 full time staff. The Department of Administrative Services rent for the Archives Building is \$1,401,912 for the biennium; this makes up more than one-third of our budget. The stack areas in the State Archives **are** temperature and humidity controlled, ensuring that the historical records of Oregon’s Government are stored and protected in the proper environment. The current stack areas have conventional shelving but can be changed out to more cost-effective compact shelving without having to re-engineer the existing facility.

In addition, the State Archives leases the State Records Center (28,500 square feet) to store 100,000 cubic feet of state agency records that are semi-active or inactive, and a small office space for two, full time employees. The rent for the State Records Center is \$22,104.38 per month and is paid as part of an assessment paid by state agencies using the State Records Center. The State Records Center provides state agencies a cost effective (currently set at \$6.95 per box per year) and efficient way to store these records until their scheduled retention period has been met.

Both the Library and Archives buildings have non-archives/library tenants occupying space. The Department of Human Services currently leases 5,610 square feet of office space at the Library for their Office of Contracts and Procurement. The Department of Administrative Services leases 1,338 square feet of stack space at the Library to the Hatfield Library at Willamette University and they have expressed an interest in leasing additional space as it becomes available. The majority of the second floor of the Archives building is home to PERS’ Oregon Savings Growth Plan.

*Options Considered by the Subgroup*

<b>Option #1: Privatization of Records Center</b>	
<i>Pros</i>	<i>Cons</i>
<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• The State Records Center Costs are less expensive than private sectors costs.</li> <li>• Destruction is not mandatory at private facilities it is at the State Records Center saving state agencies money by not storing records past retention.</li> <li>• Electronic Records Management will lessen or eliminate the need for paper records in the long term.</li> </ul>
<b>Option #2: Require agencies to use state records center for all records.</b>	
<i>Pros</i>	<i>Cons</i>
<ul style="list-style-type: none"> <li>• Cost savings for agencies</li> </ul>	<ul style="list-style-type: none"> <li>• Current facility would have to be expanded</li> </ul>

<ul style="list-style-type: none"> <li>• More effective retention management</li> </ul>	
<b>Option #3: Vacate one of four stack tiers at Library</b>	
<i>Pros</i> <ul style="list-style-type: none"> <li>• Cost savings for Library</li> <li>• Willamette University already leasing stack space at the Library</li> </ul>	<i>Cons</i> <ul style="list-style-type: none"> <li>• May be difficult to lease to others</li> <li>• Labor-intensive to deaccession and shift collections</li> </ul>
<b>Option #4: Utilize compact shelving at State Archives</b>	
<i>Pros</i> <ul style="list-style-type: none"> <li>• More than triples storage space at Archives</li> <li>• Potential to store Library collection at Archives</li> <li>• May cost less (cost/benefit needed)</li> <li>• Public/private partnerships with Willamette University might be expanded if they need additional space to house the Hatfield Library collections.</li> </ul>	<i>Cons</i> <ul style="list-style-type: none"> <li>• Very expensive</li> <li>• Difficulty of repurposing State Library Building</li> <li>• May cost more (cost/benefit needed)</li> </ul>
<b>Option #5: Consolidate reference rooms and open collections</b>	
<i>Pros</i> <ul style="list-style-type: none"> <li>• One-stop genealogy services</li> <li>• Virtualization of existing paper collections makes this a long-term option</li> </ul>	<i>Cons</i> <ul style="list-style-type: none"> <li>• Customer needs make this difficult now</li> </ul>

*Recommendation of the Subgroup*

**Option #1: Privatization of Records Center** - The subcommittee agreed that this is not a viable option.

The Archives Division, as part of its biennial budget preparation does a price comparison with private sector vendors providing a similar service. The vendor in Salem coming closest to providing the same services as the State Records Center is Iron Mountain. Their per box price is

Approximately \$4.00 per box per year; however, there are fees to have the boxes initially received and fees when they are permanently removed as well as fees to retrieve files. The State Records Center's \$6.95 per box per year fee includes storage and retrieval costs; the only additional fee is for confidential destruction which Iron Mountain also charges. The State Records Center guarantees a twenty-four hour turnaround which is included as part of the \$6.95 per box per year fee. This same twenty-four hour turnaround service provided by Iron Mountain would cost an agency upwards of \$40 in addition to their annual per box fee.

In addition, records at the State Records Center are destroyed once their retention periods have been met. Destruction notices are sent by the Records Center staff notifying an agency that their records have met their mandatory retention period. The agency must sign off on the destruction unless there is a pending legal, fiscal or extenuating administrative reason for extending the retention period. Once the authorization is in hand, the records are destroyed, saving the agency storage and potential litigation costs. Whereas, at a private storage center, records are not tracked by the vendor for destruction and it is left up to the agency to know when their records should be destroyed. In addition, the vendor will charge a destruction fee and a deaccession fee.

**Option #2: Require agencies to use state records center for all records.** The subcommittee recommends that we should pursue this option as it is a way to save money for state agency records storage.

Currently agencies are not required to store their records at the State Records Center. Some agencies use Iron Mountain, while other agencies have private storage areas that they rent (i.e. the Larmar Warehouse formerly occupied by the State Records Center on Broadway, many self-store facilities, etc.). Private vendors such as Iron Mountain are discussed above and most of the other storage facilities have a more costly per square foot charge and require the agency to supply staff to manage, retrieve and destroy files; all of which are more expensive options than storing at the State Records Center. In addition, agencies are not likely to destroy records stored in these private facilities therefore incurring unnecessary storage and potential litigation costs.

The only con for this option is that the Records Center is currently at capacity. However, we are in the process of discussing expansion with the landlord.

**Option #3: Vacate one of four stack tiers at Library** - The subcommittee recommends that we should pursue this option although it may take 3-5 years to complete (Library staff's estimation), due in large part to the labor intensive process of deaccessioning Library collections and shifting collections to other stack tiers. However, eliminating the need for the Library to use this space will save the Library money in rent. In addition, the Library is aware of

Willamette University Archives' interest in finding additional storage space. Since they already lease space at the State Library, it would not be difficult to amend their current lease. However, if Willamette is not interested in the space, the area has limited appeal to others and may be difficult to lease.

**Option #4: Utilize compact shelving at State Archives**

The subcommittee recommends this option as a long term option to continue to explore. Although the Archives building would not need to be re-engineered to handle compact shelving, the cost to switch from conventional shelving to compact shelving is quite high. The Archives Division did a Request for Information (RFI) in 2010, and the costs range from \$965,000 to \$1,920,000.

The subcommittee recommends that a cost benefit analysis be done to see if it is feasible to move the Library collection to the Archives and utilize the Library stack space in a different manner.

The subcommittee also discussed using the gained space from compact shelving to expand the State Records Center; however, the cost per square foot at the Archives Building is significantly higher than the facility currently used by the State Records Center, thus increasing costs for agencies.

**Option #5: Consolidate reference rooms and open collections**

The subcommittee recommends this option as a long term option to continue to explore. Because the Archives stacks are nearing capacity, there is currently not room to accommodate the State Library's holdings. However, if we change out to compact shelving (see above option), there would be room to do so, making this a long term option. In addition, as more and more information becomes electronic, this option becomes more viable.

*Option #6: Digitize collections to vacate stack space*

See Issue - Increased Utilization of Digital Resources – Option 1

**E) Consolidation of services of the State Library, Higher Education libraries, and the State Law Library**

Subgroup Name:	Subgroup on Law Library and State Library Services
Issue:	<b>e) Consolidation of services of the State Library, Higher Education libraries, and the State Law Library</b>
Chair:	Cathryn Bowie, Acting State Law Librarian

*Summary Description of the Current Situation*

State Law Library

The State of Oregon Law Library is the primary legal information resource for state government and offers access to the law for all Oregonians. The library collection includes primary legal material, historical and current, from all U.S. jurisdictions and maintains current secondary material in all areas of law. The collection is strong in legal practitioner's materials. Our primary patrons are appellate justices and judges, trial court judges, and Oregon Judicial Department legal staff; Department of Justice legal staff; and the legal staff of the Office of Public Defense. The Law Library provides legal research assistance to the legal staff of all state agencies and departments and the public.

Research transactions for state employees:

2009 – 2563

2010 – 3646

Although outside of the scope of this particular work group, some reference was made to service delivery in county law libraries and specifically to a report compiled by Ruth Metz, which can be read by following this link:

<http://www.oregon.gov/OSL/LD/LSTA/2010/OCCLLReport120910final.pdf?ga=t>

Work group members referenced issues with county law library services. One is ensuring state funding and dedicated fees make their way to county law library services. Others spoke to the quality of service, which varies. For Rep. Nathanson, the need for citizens to have access to these services is a question of equal access to justice system.

State Library – Government Research Services

Mission of the Government Research Services team of OSLL: to provide quality information services to Oregon state government. This includes answering research questions for state employees, providing permanent public access and depository services for state government publications, and answering public inquiries about Oregon government,

history, and culture.

Research transactions for state employees since FY2006

<b>06</b>	13,887
<b>07</b>	15,216
<b>08</b>	14,068
<b>09</b>	14,758
<b>10</b>	14,213
<b>11</b>	12,920

*Options Considered by the Subgroup*

*Option #1: Consolidate State Library's Government Research Services with the State Law Library.*

<p><i>Pros</i></p> <ol style="list-style-type: none"> <li>1. One-stop service for walk-ins.</li> <li>2. Synergy of having all collections and resources at one site.</li> </ol>	<p><i>Cons</i></p> <ol style="list-style-type: none"> <li>1. Minimal overlap of services and collections</li> <li>2. Cost savings are questionable.</li> <li>3. No extra space in either facility.</li> <li>4. Oregon State Library staff are represented.</li> <li>5. Potential separation of powers issues.</li> </ol>
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*Option #2: Consolidate web presence of the Government Research Services and the State Law Library.*

<p><i>Pros</i></p> <ol style="list-style-type: none"> <li>1. One-stop service for library users; would reach more users.</li> <li>2. More cost-effective than physical consolidation.</li> <li>3. Could be developed in 2012.</li> <li>4. Would be even better as part of a State of Oregon intranet.</li> <li>5. More efficient use of existing staff.</li> </ol>	<p><i>Cons</i></p> <ol style="list-style-type: none"> <li>1. Could end up with too many websites.</li> </ol>
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*Recommendation of the Subgroup*

**Option #2: Consolidate web presence of the Government Research Services and the State Law Library.**

Recommendation of Subgroup is yes. A very beneficial, cost-effective direction for both libraries. Currently, the State Library and the State Law Library provide staff to maintain separate web sites for state agency employees to access materials. Each site requires separate logins. Agency employees should not have to “shop” for services and resources on multiple sites; never being certain if they have exhausted all resources in locating the materials and services they need. A consolidated web presence would provide a single point of entry and “guide” the user to the appropriate collections and materials.

**F) Development of Public/Private Partnerships for Library, Law Library, and Archives Services**

Subgroup Name:	Subgroup on Archive and State Library Services
Issue:	Development of Public/Private Partnerships
Chair:	Mary Beth Herkert, State Archivist

*Summary Description of the Current Situation*

Both the Archives and State Library are currently engaged in Public/Private Partnerships.

The State Library currently has a partnerships with:

**The Willamette Valley Genealogical Society** – The Library provides space, cataloging and access for their collection (including one Saturday a month for genealogy research); they provide volunteer staffing for the reference room to handle genealogy inquiries, genealogy materials for the collection and general support for this topic. Value of this partnership over the past ten years is over \$522,000 in FTE savings and collection materials valued at approximately \$241,000.

**The Oregon Poetry Association** - The Library provides space, cataloging, access and promotion for the Oregon Poetry Collection and the Oregon Poetry Association supplies the materials for the collection, works with publishers to ensure current donations and provides advice and promotion for the collection. The value of this collection is approximately \$63,000.

**Ancestry.com** is digitizing specific collections of the State Library that have value to their genealogy database. They provide the equipment, staff, expertise, software, indexing and quality control. The Library provides the documents and basic support for the staff doing the digitization. As each collection is digitized, the Library receives indexed images that it can serve up immediately (for public documents) or after a 3-year embargo (for other materials). Ancestry also provides the Library with 20 seat access to its Institutional-level database at no charge. Value of this partnership since its inception in 2010 - over \$67,000 for staffing for scanning. The project has resulted in 625,000 digitized images, all of which will be indexed. Using a standard cost-per-image of \$2.60\*, the collection effort will be worth almost \$1,700,000\*\*; and the value of the database subscription is approximately \$5,000 per year.

The State Archives currently has Public/Private Partnerships with **Argo Investments (Salem, OR)** to lease the State Records Center and with **Chaves Consulting (Baker City, OR)** for the Oregon Records Management Solution; a statewide electronic records management system. In addition, the Archives is working with Western Oregon University to create a program that would create a formal internship program where University students in the Public History program would get college credit while working at the Archives as an intern. This is scheduled to begin Winter Term, 2012. The Archives Division also has a contract with Sheridan Books (Michigan) to print the Oregon Blue Book.

\* Puglia S. The cost of digital imaging projects. Mountain View, CA: RLG DigiNews [Internet], 1999 Oct 15; 3(5). [rev. 19 Oct 1999; cited 13 Apr 2001]. <<http://www.rlg.org/preserv/diginews/diginews3-5.html#feature>>.

\*\*The Archives Division recently was a pilot agency for an imaging project with the Dept. of Corrections and the cost per image was \$.08

*Options Considered by the Subgroup*

<b>Option #1:</b> Look for collaborative public/private partnerships for Library and Archives.	
<i>Pros</i>	<i>Cons</i>
<ul style="list-style-type: none"> <li>Potential for cost savings</li> </ul>	<ul style="list-style-type: none"> <li>Would need to address legal issues</li> <li>Would need to address quality assurance</li> </ul>
<b>Option #2:</b> Pursue affiliate membership with ORBIS/Cascade Alliance for Library, Archives and State Library.	
<i>Pros</i>	<i>Cons</i>
<ul style="list-style-type: none"> <li>Greater access to information for all</li> <li>Reduce duplication of resources</li> </ul>	<ul style="list-style-type: none"> <li>Cost of membership</li> <li>Not eligible at present</li> <li>Does not serve general public</li> </ul>
<b>Option #3:</b> Pursue intergovernmental agreement with State of WA for digital preservation.	
<i>Pros</i>	<i>Cons</i>
<ul style="list-style-type: none"> <li>Have federal grant applications in to provide startup funding</li> <li>No legal obstacles</li> <li>Saves cost to both states</li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>
<b>Option #4:</b> Pursue active engagement w/Atkinson School at WU and other higher education institutions for interns	
<i>Pros</i>	<i>Cons</i>
<ul style="list-style-type: none"> <li>Cost-effective for labor force</li> <li>Diversifies our expertise</li> <li>Practical experience is beneficial to students</li> </ul>	<ul style="list-style-type: none"> <li>Requires staff resources</li> </ul>

*Recommendation of the Subgroup*

**Option #1: Look for collaborative public/private partnerships for Library and Archives.**

The subcommittee agreed that this is something that both the Archives and Library currently do and recommends that they should continue to do.

The Library is currently working with Ancestry.com to do imaging and with the Willamette Genealogical Society and the Oregon Poetry Association. We discussed the Archives using Ancestry.com but they reported that since Ancestry charges a subscription to view public records, they were advised by DOJ not to enter into a contract unless that fee could be waived. The contract with Argo Investments has been in place since 1996, when the Archives moved the State Records Center from the Larmar Warehouse on Broadway to the current site. This resulted in cost savings in rent and allowed for more dense storage (13 foot high shelving instead of six foot shelving) saving state agencies a significant amount of money in storage costs. The second public/private partnership is with Chaves Consulting in Baker City, OR. They are hosting Oregon's statewide electronic records management system that is available for all state and local government agencies to use to manage their records in a most cost effective manner. While Chaves Consulting supplies the hardware, software and data center, the Archives provides the expertise and training needed to get government

agencies to use the system. This allows the state to take advantage of ‘economies of scale’ in that the more users that are in the system, the cheaper the costs. For example, the Secretary of State spent approximately \$915,000 to implement their standalone system and was paying \$78.56 per month per user in maintenance fees. The statewide system’s monthly fees are \$37.02 per month per user and they will go down as more users come on board. In addition, new users do not need to buy the hardware and software to run the system which saves them minimally, \$915,000 in upfront, start up costs. In addition, Chaves Consulting anticipates that it will create jobs in Baker City to help manage the project and data center. Finally, state and local government agencies will be saving money in storage costs and potential litigation as its information will be managed from creation through final disposition making public records more accessible.

**Option #2: Pursue affiliate membership with ORBIS/Cascade Alliance for Library, Archives and State Library.**  
The subcommittee recommends that this should be pursued; however, there are a couple of ‘cons’ that would need to be addressed before this recommendation could be implemented. In particular, neither the State Library or State Archives qualify for full membership and certain ORBIS/Cascade Alliance services are not available to the public, eliminating most State Archives users. A more in-depth discussion of membership was had in the Law Library Subcommittee.

**Option #3: Pursue intergovernmental agreement with the State of Washington for digital preservation.**  
The subcommittee recommends this option. The Archives Division currently has applied for a federal grant to pursue this in earnest and learned that their application has been accepted (November 15, 2011). This would allow Oregon to use Washington’s Digital Archives for the long term storage of electronic records and in return, Washington could use our statewide electronic records management system; saving both states money. The State Library has already been working with the Washington State Digital Archives with funding from the Library of Congress. Partnering with both Archives for a long-term digital preservation solution for the Oregon Documents Repository may be desirable assuming costs are reasonable and the technology developed by Washington is effective in meeting the Library’s long-term digital preservation needs.

**Option #4: Pursue active engagement w/Atkinson School at Willamette University and other higher education institutions for interns**  
The subcommittee recommends this option. Both the Library and Archives have begun pursuing this option. The Archives is currently working with Western Oregon University to create a program that would create a formal internship program where University students in the Public History program would get college credit while working at the Archives as an intern. This is scheduled to begin Winter Term 2012. In addition, they are working with Willamette Students on a PACE Project, looking at ways to market the Blue Book and possibly developing mobile applications based on the information contained in the Blue Book. The Library has already successfully utilized an intern from the Atkinson School to study the effectiveness of the Library’s Key Performance Measures and make recommendations for improvement. The Library has recently adopted new policies and procedures for the successful recruitment and utilization of interns.

Subgroup Name:	Subgroup on Law Library and State Library Services
Issue:	<b>f) Development of public/private partnerships for library, law library, and archive services</b>
Chair:	Cathryn Bowie, Acting State Law Librarian

*Summary Description of the Current Situation*

**The State of Oregon Law Library**  
SOLL is a member of the Hatfield Library Consortium. Membership includes the State Library, State Law Library and Willamette University Libraries. The consortium allows sharing of an integrated library system that houses the records of all member libraries’ collections. Patrons can search across all collections. The consortium also allows inter-library loans to participating consortium members. The cost per year is @ \$6,600 with minimal upkeep costs.

**State Library – Government Research Services**  
The GRS team has three principle partnerships in place currently.  
1) MoU with the Willamette Valley Genealogical Society. We provide space, cataloging, and access for their collection (including one Saturday a month for genealogy research); they provide volunteer staffing for the reference room to handle genealogy inquiries, genealogy materials for the collection, and general support for this topic.

Value of this partnership over the past ten years:

- Over \$522,000 FTE savings

<ul style="list-style-type: none"> <li>Collection materials valued at approximately \$241,000</li> </ul> <p>2) MoU with the Oregon Poetry Association to maintain the Oregon Poetry Collection. OSL provides space, cataloging, access, and promotion for the OPC; OPA supplies the materials for the collection, works with publishers to ensure current donations, and provides advice and promotion for the collection. The value of this collection is approximately \$63,000.</p> <p>3) Contract with Ancestry.com. Ancestry is digitizing specific collections of OSL material with value to their genealogy database. They provide the equipment, staff, expertise, software, indexing, and quality control. OSL provides the documents and basic support for the staff doing the digitization. As each collection is digitized, OSL receives indexed images that it can serve up immediately (for public documents) or after a 3-year embargo (for other materials). Ancestry also provides OSL with 20 seat access to its Institutional-level database at no charge.</p> <p>Value of this partnership since its inception in 2010:</p> <ul style="list-style-type: none"> <li>Over \$67,000 in FTE for digitization</li> <li>625,000 digitized images so far, all of which will be indexed. Using a standard cost-per-image of \$2.60*, the collection effort will be worth almost \$1,700,000.</li> <li>The value of the database subscription is approximately \$5,000 per year.</li> </ul> <p>* Puglia S. The cost of digital imaging projects. Mountain View, CA: RLG DigiNews [Internet], 1999 Oct 15; 3(5). [rev. 19 Oct 1999; cited 13 Apr 2001]. &lt;<a href="http://www.rlg.org/preserv/diginews/diginews3-5.html#feature">http://www.rlg.org/preserv/diginews/diginews3-5.html#feature</a>&gt;.</p>
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*Options Considered by the Subgroup*

<b>Option #1: Evaluate Ancestry.com partnership for possible expansion to other libraries and archives.</b>	
<i>Pros</i>	<i>Cons</i>
1. Potential for more cost savings in digitization efforts.	1. Ancestry.com has narrow scope of interest.
<b>Option #2: Explore membership in Orbis Cascade Alliance for Law Library and State Library Government Research Services.</b>	
<i>Pros</i>	<i>Cons</i>
1. Continues shared integrated library system (ILS). 2. Enables even greater resource sharing and access.	1. Not inexpensive to be a member.
<b>Option #3: Outsource Law Library and Government Research Services to Willamette University Libraries.</b>	
<i>Pros</i>	<i>Cons</i>
None	1. Would become secondary customers, not primary mission of University libraries. 2. Conflicting/Different accreditation standards. 3. State Law Library confidentiality issues (pre-decision research and drafting must remain in house, not fielded to non-Oregon Judicial Department librarians). 4. State Law Library proximity is important (Physical location is important, primary patrons are OJD, DOJ, Office of Public Defense and Tax Court are within 100 yards). 5. Core collections are different. Academic collection is geared toward academic research. 6. Staff competencies are different. 7. Current facilities can't be easily and inexpensively repurposed.

*Recommendation of the Subgroup*

<p><b>Option #1: Evaluate Ancestry.com partnership for possible expansion to other libraries and archives. Recommendation of Subgroup is yes.</b></p> <p>In response to increasing demands for remote access to library collections and more specifically to genealogical materials, the expansion of the current partnership with Ancestry.com is worth exploration. Potential cost savings for digital conversion, technology, and staff is great as has already been evidenced from the existing agreement with the State Library.</p> <p><b>Option #2: Explore membership in Orbis Cascade Alliance for Law Library and State Library Government Research Services. Recommendation of Subgroup is yes.</b></p>
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The Law Library and State Library's current Integrated Library System (ILS) is through the Hatfield Consortium with Willamette University Libraries. Willamette is a member of Orbis Cascade Alliance and is evaluating a move to Orbis' ILS. This would leave the State Library and the State Law Library without a method for searching our collections. Inclusion in Orbis would simplify the existing partnership exemplified by the Hatfield Library Consortium and offer unique value of our resource collections to Orbis.

### **(G) Development of a More Cost-Effective Delivery of the Talking Book and Braille Services**

Subgroup Name:	<u>Subgroup on Talking Book and Braille Library Services</u>
Issue:	<u><b>g) Development of a more cost-effective delivery of Talking Books and Braille Services</b></u>
Chair:	<u>Jim Scheppke, State Librarian</u>

#### *Summary Description of the Current Situation*

The State Library's Talking Book and Braille Services (TBABS) is the only free public library service for blind and print-disabled readers in Oregon. The State Library has provided this service for 42 years. From 1932 when the service began until 1969, the service was provided by the Multnomah County Library.

Talking Book and Braille Services is provided in partnership with the National Library for the Blind and Physically Handicapped at the Library of Congress (NLS). The Library of Congress provides the books, the players, and free postage to mail books to customers. The State Library provides the staff, the facility to house the books, and the technology to manage the library catalog and book circulation. The State Library has a formal cooperative agreement with the Library of Congress that sets out the terms and conditions of the partnership. It was entered into in November, 2009, and expires in 2014.

Currently (August, 2011) TBABS has 5,183 registered patrons and 342 institutions. A snapshot of the age breakdown of the TBABS' patrons is as follows:

- 0-18 – 225 (4%)
- 19-40 – 374 (7%)
- 41-60 – 890 (17%)
- 61-80 – 1,576 (30%)
- Over 80 – 2,118 (41%)

The institutions category is comprised of nursing homes, assisted care facilities, public libraries and schools. TBABS is currently netting about 75 new patrons per quarter (new patrons minus withdrawn patrons).

The 2011-13 Legislatively-Adopted Budget for TBABS is \$1,470,005, down 1.2% from the 2009-11 budget after the 2010 allotment reductions. General Funds comprise 75% of the TBABS budget and Other Funds (donations) comprise 25% of the budget. In 2009-11 Other Funds comprised 21% of the TBABS budget.

Staffing for TBABS consists of 8.74 FTE, including one Program Manager. Operations staff is 8.0 FTE. The remaining .74 FTE works exclusively on fundraising. In the first half of 2011 TBABS averaged about 212 hours of volunteer service per month, the equivalent of an additional 1.2 FTE for operations.

Books are delivered directly to the readers' home by mail or download at no cost to the patron or to the State. During the last fiscal year, TBABS circulated 420,539 books and other library materials. This was an increase of 19% from the prior fiscal year and an all-time record for TBABS circulation. The increase is attributed to the popularity of the digital talking books and digital talking book players that were introduced in September 2009 as a replacement for cassette technology that was in use since the 1970s.

The circulation staff mails an average of 1,464 audio books a day to patrons across the state and receives approximately the same number by return mail. We estimate this costs the Federal government approximately \$5,621 in postage per day (\$1.92 each way).

A download service is available to patrons called BARD (Braille and Audio Reading Download). BARD is accessible via the Internet 24 hours a day, 7 days a week. Patrons can download as many books as they like with no due dates and save them to a USB flash memory drive for playing in the digital talking book player. At present time there are 1,037

patrons registered for BARD service, which is 20% of the patron base. In the last fiscal year, patrons downloaded 55,387 books and magazines, 13% of books and magazines circulated. BARD is provided by NLS via the TBABS website.

TBABS also provides Braille books to about 100 Braille readers through a contract with the Utah State Library. TBABS handles all customer service and the Utah State Library fulfills orders for Braille books from their location in Salt Lake City. There is also a Braille download service provided by NLS called Web-Braille. It will soon be merged with BARD and readers can have their choice of downloading in audiobook format or Braille format.

TBABS benchmarks its operations against those of five other states (Arizona, Colorado, Iowa, Washington, and Wisconsin) with comparable demographics that predict library use (e.g., education level, income level). In the latest data for FY 2008 TBABS had the second lowest cost per circulation (\$2.19) and the highest circulation per FTE staff (34,027). Since FY 2008 TBABS staff has one fewer FTE and circulation has increased significantly, so staff productivity is now even higher. The TBABS cost per circulation of \$2.19 compares favorably to the average for all six states of \$5.13.

In the latest annual TBABS customer satisfaction survey, conducted by a telephone interview of a random sample of TBABS customers in March – May, 2011, 86.3% of customers rated their service as “excellent” and another 11.5% rated their service as “good” overall. The percentage of customers rating their service as “excellent” was up 7.9 percentage points from the prior year, which the staff attributes mostly to the high degree of satisfaction with digital talking books.

*Options Considered by the Subgroup*

**Option #1: End the cassette program this biennium.**

<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• There could be some cost savings (estimated \$25,000/ yr. for labor).</li> </ul>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• There is a small minority of customers who prefer cassette format to digital format.</li> <li>• There are older books that have not been converted to digital format yet.</li> <li>• The cassette program will phase out naturally within 5-10 years as older library users who have been reluctant to switch to digital talking books leave the program.</li> </ul>
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**Option #2: Phase out mailing digital talking books in the near term and require all customers to download their own books using BARD.**

<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• There would be significant savings from doing this (estimated \$400,000/yr. for labor, supplies, rent).</li> </ul>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• 41% of customers are 80+ and may not be able to download.</li> <li>• Many customers do not use computers or the Internet.</li> <li>• Our cooperative agreement with the Library of Congress would not allow this.</li> </ul>
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**Option #3: Consolidate the TBABS program with the Oregon Commission for the Blind.**

<p><i>Pros</i></p>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• Cost neutral at best.</li> <li>• Significant start-up costs.</li> <li>• Funding streams are discrete and can't be merged.</li> <li>• Agency programs do not overlap now.</li> <li>• The Commission does not serve reading and physically disabled persons (e. g., dyslexic, paraplegic, etc.).</li> <li>• The Commission facility in Portland could not accommodate TBABS.</li> <li>• Staff competencies needed for the two programs are different.</li> <li>• The TBABS program in Iowa, run by their Commission for the Blind, has the highest cost among peer programs.</li> </ul>
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**Option #4: Cease duplicating digital talking books on demand.**

<p><i>Pros</i></p>	<p><i>Cons</i></p>
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<ul style="list-style-type: none"> <li>• There would be some small cost savings (estimated \$10,000/yr.)</li> </ul>	<ul style="list-style-type: none"> <li>• The National Library Service Multi-State Center in Salt Lake City plans to begin loaning digital talking books that we do not have in the TBABS collection at no cost in the next 12-18 months.</li> </ul>
<p><b>Option #5: Work with the Library of Congress to retrofit the digital talking book players for self-service wireless delivery (similar to the Kindle) in the long term.</b></p>	
<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• There would be significant savings from doing this (estimated at \$400,000/ yr. for labor, supplies, rent).</li> </ul>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• There would be high start-up costs to retrofit the digital players and modify our integrated library system.</li> <li>• Oregon can't make this happen on our own.</li> <li>• Will require increased IT support.</li> </ul>
<p><b>Option #6: Phase out providing digital talking book players to customers in favor of other devices that they could purchase.</b></p>	
<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• Savings to the Federal Government which provides the players.</li> </ul>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• The digital talking book players are designed to be easy to use for the 41% of customers who are 80+; there are no comparable players in the commercial market.</li> <li>• There is no shortage of digital players available for our customers, so cost savings potential is questionable.</li> <li>• Many blind library users have limited incomes.</li> <li>• Adaptive commercial players are expensive.</li> </ul>
<p><b>Option #7: Encourage the Library of Congress to enable all types of consumer devices to play digital talking books.</b></p>	
<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• TBABS could serve more eligible Oregonians, especially more young people.</li> <li>• TBABS customers should have the option to listen to books on whatever device they prefer.</li> </ul>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• Oregon can't make this happen on our own.</li> </ul>
<p><b>Option #8: Discontinue Talking Book and Braille Services and provide library service to blind and print-disabled Oregonians from local public libraries.</b></p>	
<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• There are over 200 public library locations in communities throughout the state.</li> <li>• Shifts cost from State to local governments (estimated savings of \$700,000 to the State).</li> </ul>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• 4% of Oregonians do not have local library services.</li> <li>• The Library of Congress only partners with state or regional partners, not with individual public libraries.</li> <li>• Many public libraries have a very limited selection of commercial audiobooks.</li> <li>• Most public libraries would not be willing to mail commercial audiobooks directly to customers like TBABS does.</li> <li>• Public libraries do not have access to Braille books.</li> <li>• Public libraries do not have integrated library systems designed to serve the blind and print disabled.</li> <li>• The capacity of local libraries to take this on varies greatly.</li> <li>• Oregon would be the only state in the U.S. that does not provide talking book and Braille services.</li> <li>• Creates ADA liability for public libraries not able to serve blind readers.</li> <li>• Costs to deliver the service would be higher for local governments than for the State.</li> </ul>
<p><b>Option #9: Move to a regional (multi-state) model for the delivery of Talking Book and Braille Services.</b></p>	
<p><i>Pros</i></p>	<p><i>Cons</i></p>

<ul style="list-style-type: none"> <li>• There is some potential for cost savings (estimated at \$100,000/yr.).</li> <li>• This in combination with Option #5 might achieve the most savings.</li> </ul>	<ul style="list-style-type: none"> <li>• Many TBABS customers value the long, personal relationships they have developed with TBABS staff.</li> <li>• Would 86% of TBABS customers still find their service to be “excellent”?</li> <li>• Potential decrease in level of service.</li> <li>• Significant start up costs.</li> <li>• Oregon can’t make this happen alone.</li> </ul>
<p><b>Option #10: Move to a self-service model that eliminates the ability to consult with staff about book selections.</b></p>	
<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• There is some potential for labor cost savings (estimated at \$100,000/yr.).</li> </ul>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• Our cooperative agreement with the Library of Congress would not allow this.</li> <li>• Many TBABS customers value the long, personal relationships they have developed with TBABS staff.</li> <li>• Would 86% of TBABS customers still find their service to be “excellent”?</li> <li>• Some customers rely on staff assistance and would leave the program.</li> </ul>
<p><b>Option #11: Introduce Talking Book and Braille Services to all Oregon children who might benefit from the service using the Individualized Family Service Plan/Individualized Education Plan process.</b></p>	
<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• All eligible Oregon children should have the ability to receive library services from TBABS.</li> <li>• This is consistent with the education system changes the Governor is putting in place.</li> </ul>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• There could be significant additional cost to serve more students.</li> <li>• Some students may be high maintenance.</li> <li>• May be difficult to work with multiple agencies serving students.</li> </ul>
<p><b>Option #12: Limit Talking Book and Braille Services to the senior market segment.</b></p>	
<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• There is some potential for labor cost savings (estimated at \$50,000/yr.).</li> </ul>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• Many of the 28% of customers under 60 would not have a good alternative to obtain free library services, especially Braille readers.</li> <li>• Our cooperative agreement with the Library of Congress would not allow this.</li> <li>• Oregon would be the only state in the U.S. that did not provide talking book and Braille library services to all eligible citizens.</li> <li>• Creates ADA liability for public libraries not able to serve younger blind readers.</li> <li>• Would hinder efforts to improve Braille literacy among blind students.</li> <li>• Creates age discrimination liability.</li> </ul>
<p><b>Option #13: Aggressively promote BARD to all TBABS customers to reduce mailing of digital talking books.</b></p>	
<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• Use of BARD saves on postage, labor, rent, and supplies.</li> <li>• TBABS allows others to download talking books for elderly customers and others who don’t use computers or the Internet (e. g. relatives, friends, and caregivers).</li> </ul>	<p><i>Cons</i></p>
<p><b>Option #14: Move to hosted open source integrated library system from the current commercial system.</b></p>	
<p><i>Pros</i></p> <ul style="list-style-type: none"> <li>• The regional library that serves Georgia has received a federal grant to plan this for the future, and TBABS is a partner in the grant project.</li> <li>• There is potential savings both in the cost of the commercial system we currently use and in the</li> </ul>	<p><i>Cons</i></p> <ul style="list-style-type: none"> <li>• Oregon can’t make this happen on our own.</li> <li>• Open source solution is unproven.</li> </ul>

cost of having to host our commercial system in-house (estimated \$25,000/yr.).	
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*Recommendation of the Subgroup*

**Option #5: Work with the Library of Congress to retrofit the digital talking book players for self-service wireless delivery (similar to the Kindle) in the long term.**

The Oregon State Library should work aggressively with other regional libraries for the blind to make this happen as soon as possible. We need to advocate for this with the Library of Congress and with our Congressional leaders. The Library of Congress should develop a business case to replace mailing digital talking books with a wireless delivery system that is likely to be much less expensive than mailing. There would be a significant startup investment to retrofit the players TBABS already has in the field and to procure a wireless delivery system, but once these investments were made, long term postage cost savings for the Federal government and long term labor cost savings for regional libraries would be substantial compared to mail delivery. As a first step we need a business case that details the advantages of this.

**Option #7: Encourage the Library of Congress to enable all types of consumer devices to play digital talking books.**

There is no downside to allowing users of our talking books to use whatever device they prefer to listen to their talking books. Libraries for the blind in Australia have been offering an app to enable Apple devices to play their talking books for over a year now. Many consumer devices such as smartphones, MP3 players, and tablet computers are becoming more adaptive for the blind. TBABS could improve its customer service by not limiting customers to using the NLS digital talking book player to listen to their books. For all its advantages (particularly for older TBABS customers) the NLS digital talking book player is not very light and portable, like a smartphone or MP3 player. The TBABS program would have more appeal for younger people if they could listen to their talking books on their smartphone, MP3 player, or tablet computer. The Library of Congress has indicated that they plan to develop apps for consumer devices in the future. We need to push them to develop this as soon as possible.

**Option #9: Move to a regional (multi-state) model for the delivery of Talking Book and Braille Services.**

For the past 80 years there have been regional libraries for the blind in nearly every state (exception: Wyoming contracts with Utah to be its regional library), but as technology changes, scaling up talking book services to a regional level may make business sense. This might be the case, in particular, if the technology evolves to a wireless delivery model (Option #5), which would be much less labor intensive than the current delivery model. The Oregon State Library should be discussing this as a possible long term direction with other states in our region (e. g., Alaska, Washington, Idaho, Montana) and at some point conduct an investigation to see if a sound business case exists for regional library service for the blind and print disabled. For Oregon there would have to be a reasonable expectation that the high standard of customer service the Oregon State Library delivers would continue under a regional delivery model.

**Option #11: Introduce Talking Book and Braille Services to all Oregon children who might benefit from the service using the Individualized Family Service Plan/Individualized Education Plan process.**

The current way that Oregon families and children become aware of TBABS does not appear to be working very well. Only about a quarter of children who are blind or have other visual impairments are using TBABS. Children with other disabilities like dyslexia that might qualify them for TBABS service also are not taking advantage of the program in any significant numbers. The State Library needs a stronger partnership with the Oregon Department of Education, the Education Service Districts and local school districts to sign up more eligible Oregon children for TBABS services. This is consistent with the education policy goals of Governor Kitzhaber to create a more seamless education system that is not siloed, and that better meets the needs of all our children, beginning at birth. The closure of the Oregon School for the Blind has made it more challenging for TBABS to work with all blind students, but it is not impossible if we have the cooperation of all the education service providers serving blind and print disabled children in the state.

**Option #13: Aggressively promote BARD to all TBABS customers to reduce mailing of digital talking books.**

With the popularity of digital talking books more Oregonians are signing up for TBABS services. Book circulation set an all-time record in 2010-11. Only about 10% of eligible Oregonians use the service today, but it appears that that percentage will increase as more Oregonians learn about digital talking books, and as the large baby boom generation begins to experience age-related vision impairments. This is all happening in the context of a declining budget for TBABS and the prospect that resources may not be available to support growth in the program. One near term solution to this problem would be for more TBABS users to use BARD. About 20% of TBABS customers are currently registered to use BARD to download their own talking books. If we could push that percentage higher, say, closer to 50%, that would be a big labor savings and allow TBABS to serve more customers. One way to do this would be to encourage TBABS customers who do not use computers or the Internet to share their BARD password with relatives, friends or caregivers, who could download books for them. This is already being done. The users who are doing this seem to appreciate the convenience and the quicker access to books than waiting for mail delivery. TBABS needs to set a goal to sign up as many users as possible for BARD and encourage them to use BARD in order to reduce the growing

workload for TBABS staff.

**Option #14: Move to a hosted open source integrated library system from the current commercial system.**

For many years TBABS has licensed integrated library system software from a company called Keystone Systems. This software provides the databases (for patrons and books) and the check-out system that are at the core of TBABS' operations and processes. Recently the Oregon State Library became a partner in a planning grant proposal submitted to the Institute of Museum and Library Services from the state library in Georgia to develop the specifications for a new open source integrated library system to operate regional libraries for the blind. The Georgia Public Library Service has a good track record in developing successful open source integrated library systems. A system they developed for public libraries called Evergreen is now being used in public libraries throughout North America, including the Sage Library System in Eastern Oregon. The grant for \$97,843 will convene a planning committee to produce a set of core functional requirements for a new open source integrated library system for regional libraries for the blind. TBABS staff will participate in this effort. Once the core functional requirements are determined, the next phase of the project will be to develop the software. It is possible that the software could be hosted in one location to serve multiple regional libraries. TBABS should fully participate in this planning effort in hopes that a more capable open source integrated library system could be developed that would cost less to operate and could be remotely hosted, saving IT staff time and IT capacity at the State Library.

**(H) Leveraging Additional Federal Grant Funding for Libraries and Library Services**

Subgroup Name:	Subgroup on Archive and State Library Services
Issue:	Leveraging additional federal grant funding
Chair:	Mary Beth Herkert, State Archivist

*Summary Description of the Current Situation*

The State Archives takes advantage of federal grant funding from the National Historical Publications and Records Commission (NHPRC); the only granting agency that the Archives Division qualifies to receive funding from. Since 1979, institutions in Oregon have received \$1,289,968 from the NHPRC. The institutions receiving money have been Higher Education (including the universities) - \$343,449; State Archives (including the State Historical Records Advisory Board) – \$296,407; The Constitution Project - \$250,000; Oregon Shakespeare Festival - \$139,435; Oregon Historical Society – \$138,432; City of Portland – \$120, 667 and Northwest Archivists - \$1578. In addition, both the Archives Division and Harney County have grant applications that will be considered for award in November 2011. *Note: The Archives Division received word on November 15, 2011 that its application to put the Governor's records into the statewide electronic records management system and to do a 'proof of concept' with the State of Washington on sharing digital resources was successful and that they will receive approximately \$135,000 once the Federal Budget has been approved.*

The State Library has been leveraging grant funding for libraries and library services from the Federal government since 1957 when we received our first Federal block grant under the Library Services Act. The Library Services Act has changed over the decades and today is called the Library Services and Technology Act (LSTA). It is administered by the Institute of Museum and Library Services (IMLS).

The Oregon State Library Board of Trustees must adopt a five-year state plan in order to receive LSTA block grant funds from IMLS. The goals of Oregon's 2008-2012 LSTA Five-Year State Plan are:

- All Oregonians have access to high-quality library and information resources, anytime, anywhere, that help them achieve success in school, in the workplace, and in their daily lives.
- All Oregonians possess the information literacy skills necessary to find, evaluate, and use the information resources that they need to succeed.
- All Oregonians experience the joy of reading and develop and maintain a high level of reading ability.
- Libraries in Oregon offer expanded access to information and educational resources, enhanced access to networked information, improved linkages between and among all types of libraries and more effective services to populations targeted in LSTA because library staff have the knowledge, skills and competencies they need to effectively advance the six LSTA purposes.
- Oregon libraries use cost-effective technologies to expand and enhance the access that all Oregonians have to information resources.
- Oregon libraries are centers of community life where Oregonians connect with information resources and with each other.

Since the LSTA was first authorized by Congress in 1997, the State Library has received a total of \$28,667,627 in

LSTA funding. The funds carry both a state matching and maintenance of effort requirement, and only 4% of the Federal funds can be used for administration of the LSTA program. The major components of Oregon’s match of LSTA funds are the General-Funded Ready to Read Grant program and the Talking Book and Braille Services program.

In FFY 2011, the State Library received an allotment of \$2,213,648 in LSTA funds, down 6% from the previous year. In the State Library’s 2011-13 Legislatively-Approved budget, LSTA funds comprise 34% of the total budget for the agency. They comprise 72% of the total budget for the Library Development Services budget, the program unit at the library that works to improve library services for all Oregonians.

LSTA funds may be used for grants and services to benefit all types of libraries — public, college and university, school and tribal libraries. The State Library Board has created the 13-member Library Services and Technology Act Advisory Council to advise them on the use of LSTA funds to meet the goals of the five-year state plan. The Board annually approves a budget for the use of the funds and awards competitive grants to libraries and other organizations throughout the state.

The LSTA budget is a mix of competitive grants and statewide services to benefit libraries. In 2011, 14 grant projects were funded totaling \$562,052. These grants comprised 26% of the total LSTA budget. The largest percentage of LSTA funds (27%) provided a suite of library reference databases for all public, academic, school and tribal libraries in the state. Sixteen percent of LSTA funds supported the L-net project at Multnomah County Library which enables every Oregon library to offer 24/7 online reference service to all Oregonians. Nine percent of the funds were used for a program to serve the 4% of Oregonians who don’t have local library service. Seven percent of the funds were used for administration and evaluation, including collection of annual statistics from all Oregon public libraries. The remaining 15% of the funds were used for a variety of smaller projects supporting library services throughout the state.

While the state-based LSTA block grant program is the largest source of funding for state libraries at the IMLS, there are also a number of smaller competitive grant programs that can be leveraged by states. Because of the Oregon State Library’s limited capacity to apply for and administer Federal grants, the State Library’s strategy has been to seek out partners to apply for these grants and to find external fiscal agents to manage them. This has been a successful strategy as indicated by these recent grants (since 2006) from IMLS in which the Oregon State Library has been a major partner:

- Tribal Library, Archives, and Museums Continuing Education Project (\$594,757)
- Transforming Life After 50: Baby Boomers and Public Libraries Continuing Education Project (\$170, 025)
- Open Source Integrated Library System for Regional Libraries for the Blind Planning Project (\$97,843)

The State Library also works aggressively with local Oregon libraries to leverage grant funds from charitable foundations in Oregon and elsewhere. The State Library encourages LSTA grant recipients to leverage competitive LSTA grants with grants from foundations like the Meyer Memorial Trust, the Oregon Community Foundation, the Ford Family Foundation and others. This strategy has been successful on numerous occasions. The State Library also frequently provides advice to these foundations in their grant-making to libraries. At present, the State Library has fielded an online needs assessment survey developed by the Ford Family Foundation in cooperation with the Oregon Community Foundation and the Meyer Memorial Trust, so that the State Library and the foundations can learn more about the most pressing funding needs of Oregon public libraries.

**Note:** The current national budget climate has the NHPRC’s 2012 budget being reduced by half in the Senate and 90% in the House. The Senate Appropriations Committee has voted to maintain LSTA funding at its current level in 2012. The House has yet to act on LSTA funding.

*Options Considered by the Subgroup*

<b><i>Option #1: Encourage and support heritage organizations to obtain federal grants</i></b>	
<i>Pros</i>	<i>Cons</i>
<ul style="list-style-type: none"> <li>• HB 2859 will address this</li> </ul>	<ul style="list-style-type: none"> <li>• Sources are very limited</li> <li>• Granting process is difficult</li> <li>• Availability of matching funds is problematic</li> </ul>
<b><i>Option #2: Work with Congressional delegation to preserve funding for libraries and Archives</i></b>	
<i>Pros</i>	<i>Cons</i>
<ul style="list-style-type: none"> <li>• Will help make Oregon Delegation aware that funding for NHPRC and LSTA is at risk and that will directly affect the Archives and Library in Oregon</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>

*Recommendation of the Subgroup*

**Option #1: Encourage and support heritage organizations to obtain federal grants**

The subcommittee recommends this option using the directions outlined in HB 2859 from this past session requiring the State Library, State Archives, Heritage Commission and State Historical Records Advisory Board to look at ways to bring more grant funding to Oregon's heritage institutions.

The subcommittee also recommended looking at the current granting process to see if it can be streamlined. They also noted that most federal grants require matching funds and that can be problematic for many institutions.

**Option #2: Work with Congressional delegation to preserve funding for libraries and Archives**

Since the current national budget climate has the NHPRC's budget being reduced by half in the Senate and 90% in the House and LSTA awards to the states have also been reduced, the subcommittee recommends this option. Oregon's delegation needs to be made aware of the affect that these reductions will have on the State Library and State Archives. The subcommittee recommends that the State Library and State Archives develop a process for doing this most effectively.

**VI. Appendix**

- |  |         |
|--|---------|
| 1. Budget Note   | Page 28 |
| 2. An Historical Note  | Page 28 |
| 3. How TBABS Customers Will Borrow Their Books                             | Page 30 |
| 4. Combining Secretary of State and State Library Administrative Functions | Page 31 |
| 5. Meeting Minutes   | Page 31 |
| a. Subgroup on Archives and State Library services                         |         |
| b. Subgroup on Law Library and State Library services                      |         |
| c. Subgroup on Talking Book and Braille services                           |         |
| d. Main workgroup meetings   |         |

**1. Budget Note**

The Governor's Office, Secretary of State, and the Chief Justice are requested to convene a workgroup to develop options and make recommendations on the consolidation and improvement of library and archives services to the Joint Commission on Ways and Means and the appropriate policy committee at the beginning of the February 2011 Legislative Session. The workgroup shall make specific recommendations on the following:

- (a) Consolidation of state archives services;
- (b) Increased utilization of digital resources;
- (c) Elimination of library facility costs;
- (d) Consolidation of services of the State Library, Higher Education libraries, and the State Law Library;
- (e) Development of public/private partnerships for library, law library, and archives services;
- (f) Development of a more cost-effective delivery of the Talking Books and Braille Services;
- (g) Leveraging additional federal grant funding for libraries and library services.

The State Library, Department of Administrative Services, the Oregon University System, Oregon Commission for the Blind and the Department of Education are instructed to be participating members of the workgroup. The Oregon State Bar Association should also be requested to participate in the workgroup.

**2. An Historical Note about Libraries and Archives in Oregon State Government**

By Jim Scheppke, State Librarian

It is worth remembering that the three libraries and archives that the State of Oregon operates today can trace their roots back to the Oregon Territorial Library, the first publically supported library in Oregon.

The Oregon Territorial Library was created by the U.S. Congress under the same act that established the Oregon Territory in 1848. Beginning with the Wisconsin Territory in 1836, Congress made a practice of appropriating funds so that new territories could have a basic collection of state statutes and other law books to assist territorial governors and legislators in creating new laws. The Congress appropriated \$5,000 for the Oregon Territorial Library, and Territorial Governor Joseph Lane made the initial purchase of books in New York City. The Territorial Library was originally located in Oregon City but was relocated to Salem when it became the new capital in 1852.

Tragically, the library was consumed in the State Capitol fire of 1855, and only a few books that were in circulation survived. In 1856, the Territorial Legislature requested \$20,000 from the Congress to replace the Territorial Library collection, but Congress appropriated only \$500.

When Oregon achieved statehood in 1859, the Territorial Library became the State Library and the librarian became the State Librarian. The first State Librarian, B. F. Bonham, reported in 1860 that the collection had grown to include 1,027 volumes and five newspaper subscriptions.

The 19th century State Library struggled for adequate resources to serve the needs of the new state government. In his 1872 biennial report, the State Librarian described the library as “one of the most constantly and consistently neglected institutions of the state — inferior to the library of many respectable villages in the eastern states.”

Before 1864 the State Librarian was appointed by the Legislature, but in that year, the Secretary of State became the Superintendent of the State Library. This continued to be the case until 1905 when the Library was placed under the supervision of the Justices of the Supreme Court.

The turn of the 20th century saw a greater interest in library development in Oregon largely due to the advocacy of the Oregon Federation of Women’s Clubs. The Portland Women’s Club took the lead in 1899 in getting a Portland state representative to sponsor legislation to create the state’s first tax-supported public library enabling legislation. The effort failed in 1899, but was successful in 1901. On July 18, 1901, the City of Portland passed the first property tax of 20 cents per \$1,000 of assessed valuation to support public library services. They used the funds to contract with a private subscription library, The Library Association of Portland, which had then been in existence for 37 years, to open their doors to everyone in the city. By 1903, the new librarian, Mary Frances Isom, was successful in getting the Legislature to amend the 1901 law to enable there to be a county library in Multnomah County (the 1901 law only enabled cities to form libraries), and she persuaded the County to also contract with the Library Association of Portland. The new library was only the fourth county library in the U.S.

By the middle of the first decade of the 20th century, many communities in Oregon were interested in establishing public libraries and were turning to Mary Frances Isom for help. Isom was well aware that a number of other states had established a state library commission to develop public and school library services. She visited the Wisconsin Free Library Commission in 1904 to learn more about their work, and in 1905 persuaded the Legislature to create the Oregon Library Commission, modeled closely on the Wisconsin commission. In that same year she recruited an employee of the Wisconsin commission, Cornelia Marvin, whom she met during her visit in 1904, to be the first Secretary of the new Oregon Library Commission.

Isom and Marvin worked together over the next two decades to establish public and school libraries throughout the state. The Commission also began, in 1907, to collect the publications of state government agencies, and to serve as a reference library for state government. Meanwhile, the State Library was still serving primarily as a law library for the Judicial Branch.

In 1913, the Legislature sought to clarify the roles of the two library agencies. In a move that still creates historical confusion today; they changed the name of the State Library to be the Supreme Court Library. And they conferred the name Oregon State Library on what had been the Oregon Library Commission. The mission of the Supreme Court Library would continue to be that of a law library for state government and the mission of the new Oregon State Library would be to continue to develop local library services and to meet the general library and information needs of state government, including the collection and preservation of all the publications of state government (called “state documents”). The new State Library was given custody of all general books and periodicals, and state and federal documents, and the Supreme Court Library was left with a more focused law library collection.

The records and archives of state government were handled in various ways before the appointment of the first State Archivist in 1946. Before 1915 the Legislature was involved in the records retention and disposal process, but in that year the Secretary of State was directed to dispose of the “accumulating public documents in his office which are now considered, or may hereafter become obsolete and useless.” Beginning in the 1930s the Secretary of State was authorized to transfer historical documents to the Oregon Historical Society for safekeeping.

In 1945 the Legislature authorized the hiring of a State Archivist and the creation of the first State Archives within the State Library. David Duniway, grandson of the famous suffragist and editor, Abigail Scott Duniway, was appointed to be the first State Archivist in 1946. In 1947 the State Archivist’s legal powers and duties were detailed in statute to include custody of all non-current state records. He was directed to advise and assist state, county and city officials on records issues, and public officials wishing to dispose of records were required to get permission from the State Archivist and the State Attorney. However the State Board of Control also retained some authority with respect to the destruction and transfer of public records. By 1971, however, the Board of Control had been abolished, and all responsibilities for the disposition of public records were given to the State Archivist.

In 1973 the State Archives were moved, by law, out of the State Library and into the Office of the Secretary of State. The Secretary of State was deemed the public records administrator for the state and was directed to “obtain and maintain uniformity in the application, operation and interpretation of public records laws.”

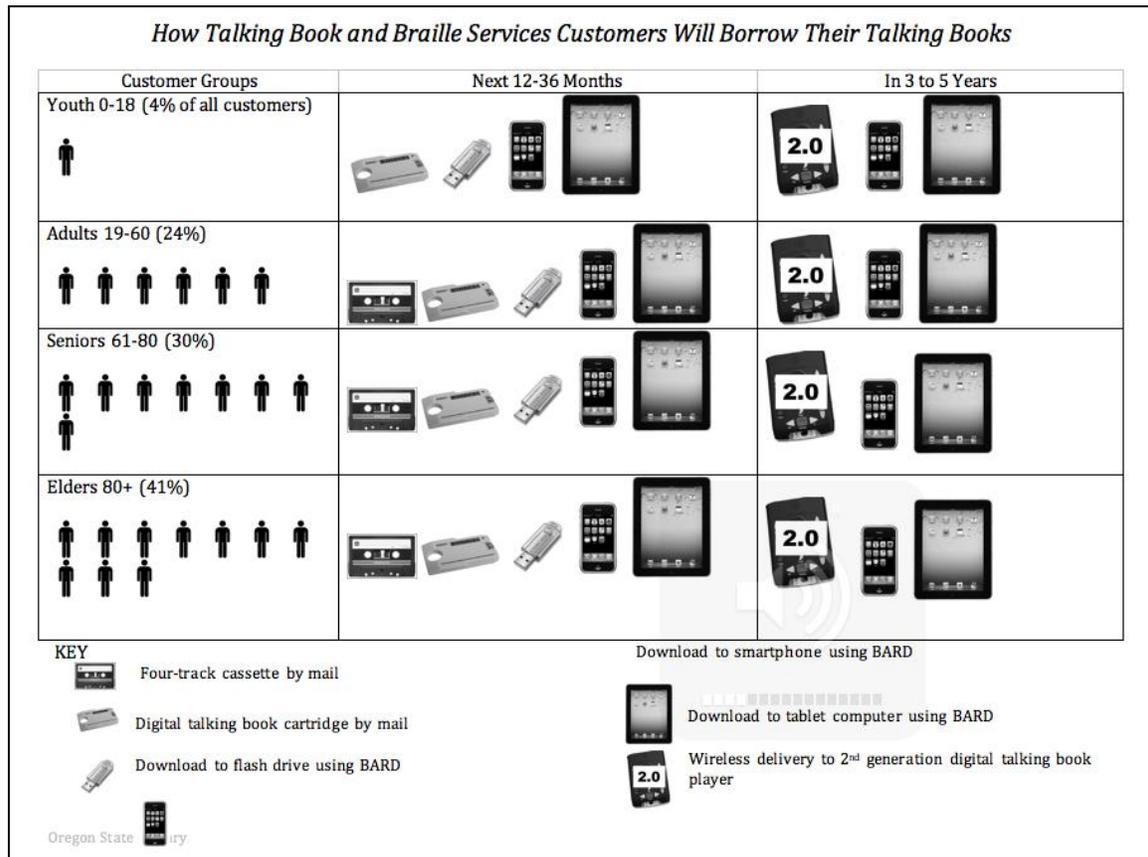
The State Library continued to serve as the depository for the publications of state government, continuing the mission begun in 1907. All state agencies were required by statute to deposit multiple copies of their publications with the State Library. The State Library cataloged the documents and sent copies to a network of public and academic libraries throughout the state in an effort to make state government publications more accessible to Oregonians.

In 1993 the Legislature created the State Library assessment on all state agencies at the recommendation of an interim legislative committee. This was done, in the wake of Ballot Measure 5, to save General Fund dollars by spreading the cost of the Library’s information services to state government across all funds. In 1997 the Supreme Court Library used this same provision in the law (ORS 357.203) to create their own assessment on all state agencies. This was part of a larger plan to improve and extend their services to Executive Department agencies. In 2001 the law was amended again to reflect a name change, when the Supreme Court Library was renamed the State of Oregon Law Library.

In 2005 the Legislature revised the laws regarding the collection and preservation of state publications to bring them into the digital age. Under the new statutes all state agencies now must provide a digital copy of all their publications to the State Library for inclusion in the new Oregon Documents Repository. In this way publications that are no longer printed can still be collected and maintained for permanent public access.

What began, 163 years ago, with a \$5,000 Congressional appropriation to purchase law books for the Oregon Territory has evolved into three distinct and mature organizations in the Executive and Judicial Branches of Oregon state government. Working together, they meet the needs of all state government agencies for research and information, and for the preservation of the history of the State of Oregon.

### 3. How Talking Book and Braille Services Customers Will Borrow Their Books



#### 4. Combining Secretary of State and State Library Administrative Functions

Jim Carbone, Policy and Budget Analyst in the Department of Administrative Services (DAS) Budget and Management Division, was asked to compare the two estimates for the savings related to combining the administrative functions of the SOS and the Oregon State Library. His findings are below.

The Workgroup has received two estimates of the savings that might result if the administrative functions for the Oregon State Library were merged with the administrative functions for the Secretary of State. Neither estimate is supported by detailed documentation or analysis.

The first estimate of \$62,000 assumes certain efficiency gains for each specific business function (purchasing, property management, budget, accounting...) in terms of FTE reductions by function. It was the result of a collaborative process involving both agencies. However this analysis was done many years ago and would need to be updated to reflect changes that have occurred since the early 1990's. The second estimate of \$1,000,000 was characterized as a "preliminary look". It assumes that the entire administrative workload of the State Library could be merged into the Secretary of State's Business Services Division, with a total savings of 5 positions and related services & supplies. These anticipated savings are attributed to "economies of scale". However there is little supporting detail describing how the efficiencies would be created while continuing to provide all services.

The only conclusion that can be drawn from these estimates is that the economies of scale from combining functions could produce some amount of savings for the State. However, both estimates are mainly based on high-level assumptions without significant analysis. Neither estimate is supported by a detailed business plan describing how the specific activities for the two agencies would be merged. Without that level a detail it is not possible to determine which estimate of savings is more realistic.

It seems reasonable to assume that there could be savings through economies of scale and that the estimate from the first study sets the minimum amount of those savings. In 2011-13 equivalent dollars, that is \$130,200. (This was computed by inflating the original \$62,000 estimate by the personal services costs per FTE inflation rate since the 1991-93 biennium). However, a detailed business plan for this merger may identify even greater savings.

It should be noted that the General Fund impact of any savings would be less than the total savings since both the Secretary of State and the Oregon State Library are supported by several non-GF funding sources. Any savings would be shared among all funding sources.

#### 5. Meeting Minutes

##### Subgroup on Archives and State Library services

- August 19, 2011, 9:00am
- August 25, 2011, 1:30pm
- September 8, 2011, 9:00am

##### August 19, 2011 – 9:00am – State Archives Building

Present: Mary Beth Herkert, Jim Scheppke, Jim Carbone, Larry Landis, Duke Sheppard, Cathryn Bowie, Sam Hall, Robert Hulshof-Schmidt, Dugan Petty, Julie Pearson-Ruthven

After introductions, Mary Beth explained the reasons for the meeting of this group as well as the larger group meetings were to look at the Library's Budget note to look at overlap, identify areas where consolidation, innovation or collaboration might work, and the areas to move forward where efficiencies can be gained.

Mary Beth went over the ground rules which included keeping an open mind and being innovative to move forward the best ideas to satisfy the Library's Budget Note requirements. Jim Scheppke also went over the template that he designed to record our ideas in an effort to make the reporting of the three subcommittees consistent. We also noted for the group that Dugan Petty and Julie Pearson-Ruthven were attending to help facilitate any technological solutions that we may recommend.

Sam Hall brought up that there is a need to clearly identify the differences in libraries and archives.

We then identified the areas that were specifically mentioned in the Budget note. They are:

Consolidation of state archives services;

Increased utilization of digital resources;

Reduction of library facilities costs;

Development of public/private partnerships for library, law library, and archive services;

Leveraging additional federal grant funding for libraries and library services.

The approach we agreed to take was to list each of the five areas above and identify options for each. Once we have done that, we will go back and list the pros and cons of each option.

##### **Consolidation of state archives services.**

We began by giving a brief overview of the Archives and the Library and then identified options.

Options: *Consolidate the Library's Government Documents and the Archives publications holdings.*

A brief discussion was held on the preliminary project that included a random sample of 1000 of the Library's Government Documents and compared that list to Archives holdings. This resulted in 40 duplicates being found. However, it was also noted that the Library's list included some public records, such as minutes. We also briefly discussed the problem that currently exists with the Library keeping all publications permanently, by statute (ORS 357.100 (3), which can conflict with an agency's records retention schedule.

*Consolidate the State Library (entire agency or Government Research Services) within the Secretary of State's agency.*

*Consolidate the web presence of the State Library and State Archives.*

*Consolidate reference services.*

#### **Increased utilization of digital resources.**

Again, we gave a brief overview of what the Archives and Library are currently doing.

Options: *Collaboration on the digitization of historical records. Possibly using the Oregon Records Management Solution to manage government documents and make them accessible to the public through the web portal.*

*Consolidate the web presence of the State Library and State Archives for public access.*

*Collaborate with Oregon University System re. Orbis Cascade Alliance licensing research databases.*

*Eliminate duplication of licensed information in state government.*

#### **Reduction of facilities costs.**

Duke Sheppard addresses the fact that both buildings currently have non-library and non-archives tenants and that it might make more sense if the two could consolidate into one building

Options: *Privatize the State Records Center.* Mary Beth did state that this was part of their budget discussions every biennium and didn't know if we needed to bring this up here. Jim Scheppke suggested that we leave it so that all facilities are addressed.

*Optimize space at both Archives and Library by:*

*Vacating one of four stack tiers at the State Library;*

*Utilizing compact shelving at the State Archives;*

*Consolidating the Reference Rooms and public collections; and*

*Digitizing collections to vacate stack space (i.e. Government Documents).*

We agreed to stop at 11:10am and continue addressing the budget notes and then the pros and cons at the next meeting. We set the next meeting for August 25<sup>th</sup>, from 1:30 until 3:30 at the State Archives.

#### **August 25, 2011 – 1:30pm**

Attendance: Sam Hall, Jim Carbone, Duke Shepard Cathryn Bowie, Dugan Petty, Jim Scheppke, Robert Hulshof-Schmidt, Mary Beth Herkert

Notes by: Mee Seon Kwon

##### I. Last meeting

- Discussed the first options, and today will finish up with last two then move onto now on to pros and cons

##### II. Development of Public/Private Partnerships

- Archives current partnerships
  - Chaves Consulting – statewide electronic records management system (2010)
  - Administrative Rules - Thompson Reuters West, Bloomberg, Lexis-Nexis, LoisLaw pay a fee to republish Oregon's Administrative Rules (1999)
  - Argo Investment – we lease the State Records Center building from them (1997)
  - Intergovernmental (state to state) partnerships – currently pursuing state to state partnership with WA; management of information and digital preservation
  - Universities – work with universities to provide interns to work for college credit (deliverable). This would foster a different diverse new group of people (versus the existing volunteer program) and the capacity of interns would be a huge contribution. There was discussion about outreach; coordination would lend to increased volunteer collaboration on broader state level
    - Pace Program at Atkinson School at Willamette University
    - Western Oregon University – working to develop a certificate program for Archives and Museums; we would help teach courses that would relate to the internships that students would participate in
  - Continue to explore possible partnerships with Family Search and Ancestry.com but need to resolve legal issues
- Library's current partnerships

- Hatfield – partnership; hosted and maintained at Willamette and cuts on cuts of IT and software. Has been in place for ≈10 years.
- MOU w/Willamette Genealogical Society – provides resources and purchases genealogical materials; available to customers but no associated state costs. Longstanding and high-quality partnership. 2 genealogical volunteers on-staff
- Another MOU: OR Poetry Assoc – aims to compile comprehensive collection of all work by OR poets. \$60-70k value. One of most actively-circulated collections
- Ancestry.com – premier online genealogical sources interested in content in collection incl. directories (connecting person to geographical destination); we are interested in having collections digitized. Under terms of partnership, Ancestry provides contractor and we provide oversight for management of materials. Government content (publ by SoO) we can make avail immediately; content that have rights to but not govt produced has a 3-year embargo but after, we can make all available. Partnership began March 2010 and have since saved \$73k in FTE, \$1.7mill in digitizing

The areas we identified for this were:

- Pursue affiliate membership with Orbis Cascade Alliance an academic library consortium for OR and WA universities aiming to have collection on one university platform. Can we work with them to be more inclusive? Issue raised with academic libraries: we have info that would serve their populations well; academic label is problematic.
- Look for additional collaborative public/private partnerships for the State Library and State Archives.
- Pursue intergovernmental agreement with Washington for digital preservation.
- Pursue active engagement with Atkinson School at Willamette and other higher ed institutes for interns.

### III. Leveraging additional federal grant funding libraries and library services

*Note:* This also came up in Heritage Commission bill (Nathanson) which posed the question of why WA received more funding than OR. Similarly, there is a need to examine issue of federal funding and grants.

- Archives grants - Mary Beth discussed grant application process and current grant application to improve management of records of Governor's administrations (Kitzhaber, Kulongoski) in statewide electronic system and to partner with Washington for records management and digital preservation. Then went on to explain what is available to Archives re. Federal funding.
  - National Historic Publications and Records Commission (NHPRC) is currently the only funding source for Archives and its future is unclear in the next federal budget cycle. Process requires agencies in Oregon wanting to apply for grant to go through State Historical Records Advisory Board (SHRAB). Current board is archivist-laden according to Mary Beth and thus scores low; need for SHRAB to reevaluate scoring process and develop more proactive method to encourage smaller institutions to apply for grants – educating these institutions to enable receipt of and increased applications for federal grants. In other words: How to increase federal funding for Oregon projects?
  - Preserving the American Historical Record – formula-block grant; has been drafted and in current economic climate, highly unlikely; base grant based on population, directed to State Archives and redistributed to institutions with historical records throughout state
- Library grants – Jim Scheppke explained the federal monies (Library Services & Technology Act) they currently receive and how it is based on a base amount and then by population.
  - Library Services & Technology Act - \$2.2 million grant currently received; have received since 1957. 5-year plan approved by Federal government regarding spending and assisted by advisory council. Example of statewide service: content management system for 60 small libraries; another portion for competitive grants. This grant is not competitive; simply requires an application with 5-year plan; future is uncertain given federal budget
- Public/private partnerships – universities – OSU is developing a public history program and my staff and I will be teaching a basic archives course again this winter term (this past winter term was the first). Our program could also be a source of interns.
- Leveraging federal grant funding – The National Endowment for the Humanities has several programs that would be applicable and available to the State Archives and/or the State Library, as well as other libraries and archives in Oregon. OSU received \$650,000 from NEH between 2002 and 2007 to establish and develop the Northwest Digital Archives consortium.
- As part of a portal site, I would like to see a portion of it that consolidates information from all of the granting agencies (state and federal) that organizations could apply to for funds for archives/libraries/heritage related projects – NHPRC, NEH, IMLS, LSTA (pass through funds from IMLS), Oregon Heritage Commission, Oregon Cultural Trust, SHPO, etc.

Talked about pros and cons - future defunding of funding agencies; if there isn't any money, no more access to federal dollars. Duke Shepard from the Governor's Office stated that he is responsible for notifying state lobbyist on issues like

this and told us to get him information so he can urge for support on this issue. Talked about how to improve so it becomes institutional with each successive administration. Two options were identified under this area:

Encourage and support heritage organizations to obtain federal grants; and

Work with Congressional delegation to preserve funding for libraries and archives.

IV. We went back to the first item, Consolidate State Archives Services, and began to identify pros and cons for each option. The first option we looked at was:

- Consolidate Archives holdings and government documents repository. State Library is responsible for maintaining a permanent accessible publication for the State; in “paper-world,” used to be sent to State printer then State Library maintained official permanent accessible publications. Publications at that time, defined as anything that went to State Printer. Secretary of State has mandate to discern what has permanent historical value to Oregon’s citizens; will look at certain publications as having historical value and thus have as the archival holdings at the Archives. The State Library random sampled (sample of 1000) to see what was duplicated at the State Archives. Archives staff identified 40 duplicates but also recognized public records (i.e. minutes) on the list of 1000 publications. Since duplication is minimal, want to find ways to increase efficiency, including single-access to government docs and publications (a common “portal” using the TRIM web portal) and then digitizing some of the older publications and making them electronically available. Goal to eliminate this duplication and cut down on work – more an efficiency measure: what to keep vs. what to dispose of. Of note: Contradiction in statutes of State Library and State Archives
  - PROS –
    1. Increased efficiency for State agencies and single access point
    2. Uniform integrated workflow – reduce redundancy of multiple work flows
    3. Improve education so people better understand what they are doing
    4. Potential cost savings
    5. Technology is already available to aid in workflow processes
  - CONS –
    1. Difference in State Library v. Archives retention statutes, which Schepcke argues is more a policy issue, however others think there is a need to resolve statutory conflict about retention
    2. Potential increased costs – including those associated with technology
    - 3.

V. Option #2: Consolidate SL or GRS with SoS

- PROS –
  1. Different funding sources
  2. Would put Library under public records administrator
  3. Potential administrative savings (even if according to Schepcke, less than 1 FTE according to 1993 research when Gov. Roberts initially proposed legislation consolidating libraries)
- CONS –
  1. Funding sources are different
  2. State Library is represented whereas Secretary of State is not
  3. Secretary of State is a non-DAS agency, the Library is a DAS agency
  4. State Library has programs unrelated to public records
  5. Constituents value citizen government (i.e. Library Board)
- Conclusion – may be unnecessary to merge both organizations entirely; may be better to consolidate portions

VI. Option #3: Consolidate web presence

- PROS –
  1. One-stop shopping
  2. Citizen-friendly
- CONS –
  1. Branding issues
  2. Separate content management systems
  3. Size of Secretary of State – Archives Division website
- Conclusions – portal may be better than simply consolidating websites. Pros indicate strong reasons for doing something but cons show that instead of wholly consolidating it may be better to devise alternatives

VII. Option #4: Consolidate reference services

- PROS

1. identify areas where customer service could be improved and ensuring that constituents are being best served and referred to appropriate reference service location using new technology
- o CONS
  1. (2) Separate facilities can't be merged – a matter of two separate physical locations and respective reference rooms; they have always been separate because there are distinct requests and thus no savings of staff. Since 1946 separation,
  2. Staff have different competencies and serve different requests
- o Conclusions – assumption of possible redundancy is moot given proposals for consolidation by means of shared resources and collaboration rather than shared physical space, which is now made increasingly possible due to technological advances reducing paper methodologies

Next meeting is scheduled for September 8<sup>th</sup> at 9:00 at the Archives Building.

### **September 6, 2011, 9:00am**

In attendance:

Cathryn Bowie, Chair, Acting State Law Librarian, State of Oregon Law Library  
Thomas Balmer, Justice, Oregon Supreme Court  
Duke Shepard, Policy Advisor, Governor's Office  
Mary Ann Hyatt, by phone, Director, University of Oregon Law Library  
Jim Scheppke, State Librarian, Oregon State Library  
Linda Gilbert, Budget Manager, Department of Administrative Services  
Robert Hulshof-Schmidt, Government Research Program Manager, Oregon State Library  
Jean Hannan, Management Assistant, State of Oregon Law Library

### **Agenda:**

Consolidation of services of the State Library, Higher Education libraries, and the State Law Library

Increased utilization of digital resources

Elimination of duplicative state subscriptions and subscription services across state agencies

Development of Public/Private partnerships for library, law library, and archive services

### **Consolidation of Services**

#1option - consolidate OSL, GRS, SOLL

Justice Balmer; Is there an overlap in services currently?

Cathryn, no

Mary Ann Hyatt - can tell right away if it's a legal research question - clear distinction of users  
one-stop shopping - rare to send to another location

#2option - consolidate web presence GRS, SOLL

Robert - area big in web hits and not many walk-ins

J.Balmer - who manages?

Robert - GRS does

new content management system.

Cathryn - specialized jobs SOLL - add special legislative content

Jim - if good, won't need the IT people to keep it running

Jim - combined web presence. Run it from OSL or SOLL

Duke - how fast can this consolidation happen?

Cathryn & Jim - 2012

Jim - have "State Employee Information Center" web site

J.Balmer - access all government or all public?

Cathryn - options w/ new contract management system to do that

Jim - 3 different web sites

Robert - password &/or login

Jim - have 2 web sites: assessment and non-assessment

Cathryn - with true portal, take care of multiple web sites

Jim - would have an intranet for the entire enterprise

gov net, OJD intranet

Cathryn - have to see the new

### **Increased Utilization of digital resources**

Linda Gilbert - Cost-effective - employees

Mary Ann - serves more users

J.Balmer – Westlaw, some use, easier to use in print

Cathryn – some more organized. Primary law – better on line. Secondary resources, hard to use

Comparable research – better w/ books. Can lay out on the table to compare

Duke – Rising prices of digital and of print

Jim – more potential for inflation in print  
Cathryn – content of digital can vary  
Jim and Robert – management costs expensive

**Elimination of duplicative state subscriptions and subscription services across state agencies**

Cathryn – Formalize - continuity in spite of staff changes

**Development of public/private partnerships for library, law library, and archive services**

Robert - 6/30/12 gov net will be gone.

No team site license

Balmer – question to Mary Ann re: Orbis

U of O or all universities

Mary Ann – UO shared OLS [Integrated Library System] and 1 web presence

Soon ILS – all of Orbis

Cathryn – problems dealing with shared proxy and server with 3<sup>rd</sup> party license?

Mary Ann – no

Jim – pitched to Orbis that OSL be an affiliate member . Orbis said no

Robert – student FTE basis for cost

Mary Ann – difficult time for Orbis

Having Oregon material would be a huge plus

Jim – would be net lenders not borrowers

Mary Ann – should be attractive to the consortium

#3 option -

Mary Ann – accrediting standards for Willamette organization

Robert – Willamette leases space at OSL for some of their collection [so no excess space @ Willamette]

Have already paid for the dedicated space in Law Library

Jim – may create a liability issue for OSL to take over SOLL

Balmer – separation of powers

Cathryn – Proximity issue – DOJ and OJD within 50 yards of resources; Types of services/resources are different.

Core collections are different

Next meeting of all subgroups 9/26/11. [Jim – don't have to have a plan to implement @ that meeting]

**Subgroup on Law Library and State Library services**

- August 24, 2011, 2:00pm-4:00pm
- September 6, 2011, 9:00am-11:00pm

**August 24, 2011 – 2:00pm – Conference Room 202, Oregon State Library**

In attendance:

Cathryn Bowie, Chair, Acting State Law Librarian, State of Oregon Law Library

Thomas Balmer, Justice, Oregon Supreme Court

Duke Shepard, Policy Advisor, Governor's Office

John Borden, Senior Legislative Analyst, Legislative Fiscal Office

Susan Grabe, by phone, Legislative Director, Oregon State Bar Association

Mary Ann Hyatt, by phone, Director, University of Oregon Law Library

Jim Scheppke, State Librarian, Oregon State Library

Linda Gilbert, Budget Manager, Department of Administrative Services

Richard Hulshof-Schmidt, Government Research Program Manager, Oregon State Library

Mary Beth Herkert, State Archivist, State Archives

Jean Hannan, Management Assistant, State of Oregon Law Library

**Agenda:**

Consolidation of services of the State Library, Higher Education libraries, and the State Law Library

Increased utilization of digital resources

Elimination of duplicative state subscriptions and subscription services across state agencies

Development of Public/Private partnerships for library, law library, and archive services

An overview of participant agencies was given: State of Oregon Law Library; Oregon State Library;

University of Oregon Law Library; Archives

There was some discussion about County Law Libraries, authorities, funding. As per Representative

Nathanson, County Law Libraries are not a part of this legislative directive due to constraints of time.

CONSOLIDATION of services of the State Library, Higher Education libraries, and the State Law Library

OPTIONS:

Consolidate State Library's Government Research Services with the State Law Library

Consolidate the web presence of the State Library's Government Research Services and the State Law Library

INCREASED utilization of digital resources

**OPTIONS:**

Continue to look for digital alternatives to high cost print versions

Digitize unique resources at State Law Library and State Library

Collaborate on proxy service

ELIMINATION of duplicative state subscriptions and subscriptions services across state agencies

**OPTIONS:**

Require agencies (by DAS rule/statute) to consult with the State Law Library and State Library's Government Research Services before purchasing digital resources

Formalize consultative process between State Law Library and State Library's Government Research Services

DEVELOPMENT of public/private partnerships for library, law library, and archive services

**OPTIONS:**

Evaluate Ancestry.com partnership for possible expansion to other libraries and archives

Explore membership in Orbis Cascade for State Law Library and State Library's Government Research Services.

Outsource State Law Library and State Library's Government Research Service's to Willamette University libraries.

**Subgroup on Talking Book and Braille services**

- August 29, 2011, 9:00am
- September 29, 2011, 1:00pm

**August 29, 2011 – 9:00am – State Library Building**

Present: Mary Beth Herkert, Jim Schepcke, Jim Carbone, Julie York, Linda Mock, Sam Hall, John Borden, Susan Westin, Art Stevenson

After introductions, Schepcke reviewed the subgroup process and went over the worksheet that had been distributed in advance to the subgroup. The issue the subgroup will investigate is "Development of a more cost-effective delivery of Talking Books and Braille Services." The subgroup will identify options to the status quo and develop pros and cons for each option. Then the subgroup will develop recommendations to take back to the full Workgroup.

Schepcke and Westin briefed the subgroup on the current situation with Talking Book and Braille Services. Some basic information was provided in advance in the worksheet. There were a number of questions and discussion. The workgroup identified the need for more data in a number of areas that will be provided at the next meeting. Westin was able to provide a comparison of Oregon's program to that in five other states based on national data for FY 2008, the latest data available.

After review and discussion of the current situation, the workgroup brainstormed the following options that need to be investigated to fulfill the charge of the Workgroup:

- Phase out the cassette program in the near term.
- Phase out mailing digital talking books in the near term and require all customers to download their own books using BARD.
- Consolidate the TBABS program with the Oregon Commission for the Blind.
- Collaborate with other states in building the digital talking book collection.
- Work with the Library of Congress to retrofit the digital talking book players for self-service wireless delivery (similar to the Kindle) in the long term.
- Phase out providing digital talking book players to customers in favor of other devices that they could purchase.
- Encourage the Library Congress to enable all types of consumer devices to play digital talking books.
- Discontinue Talking Book and Braille Services and provide library service to blind and print-disabled Oregonians from local public libraries.
- Move to a regional (multi-state) model for the delivery of Talking Book and Braille Services.
- Move to a self-service model that eliminates the ability to consult with staff about book selections.
- Introduce Talking Book and Braille Services to all Oregon children who might benefit from the service using the IFSP/IEP process.
- Limit Talking Book and Braille Services to the senior market segment.

At the next meeting of the subgroup, pros and cons will be developed for these options and the subgroup will develop recommended options to take back to the full Workgroup. Schepcke will attempt to schedule the next meeting in September.

The subgroup meeting adjourned at approximately 11:30 a.m.

**September 29, 2011 – 1:00pm – State Library Building**

Present: Jim Schepcke, Duke Shepard, Linda Mock, Sam Hall, Susan Westin

After introductions, the Subgroup approved the minutes of the August 29, 2011, meeting as drafted.

The Subgroup reviewed the draft Subgroup Worksheet. Schepcke explained the 12 options to the current situation for Talking Book and Braille Services (TBABS) that were brainstormed at the first meeting of the Subgroup

The Subgroup discussed each option and developed a list of pros and cons for each. Some wording changes were made to the original options. Group consensus was reached on the pros and cons for each option. Schepke suggested two new options. One was to develop and use hosted open source integrated library system software to replace the commercial integrated library system software that is run in-house. The other was to aggressively promote use of the BARD downloadable talking book collection to reduce the workload associated with sending digital talking books by mail. The Subgroup concurred with adding these new options and pros and cons were discussed.

The Subgroup then reached consensus on the options to recommend to the full Workgroup. They are:

- Option #5: Work with the Library of Congress to retrofit the digital talking book players for self-service wireless delivery (similar to the Kindle) in the long term.
- Option #7: Encourage the Library of Congress to enable all types of consumer devices to play digital talking books.
- Option #9: Move to a regional (multi-state) model for the delivery of Talking Book and Braille Services.
- Option #11: Introduce Talking Book and Braille Services to all Oregon children who might benefit from the service using the Individualized Family Service Plan/Individualized Education Plan process.
- Option #13: Aggressively promote BARD to all TBABS customers to reduce mailing of digital talking books.
- Option #14: Move to a hosted open source integrated library system from the current commercial system.

Schepke will complete a draft of the Subgroup Worksheet and send it out to the members of the Subgroup and ask for any feedback that members might have about the draft. Once he receives feedback he will create a final draft and send it to the full Workgroup for consideration at their next meeting in November.

The Subgroup meeting adjourned at approximately 2:30 p.m.

### Main workgroup meetings

- September 26, 2011, 10:30am
- November 21, 2011, 8:00am

### **September 26, 2011 – 10:30am – State Capitol Room 167**

#### *I. Welcome*

#### *II. Subcommittee Reports*

##### *1. Libraries & Archives*

- Mary Beth summarized the process – identified areas for improvement; pros and cons for each; made final recommendations
- Reviewed recommendations and addressed comments and concerns from group
  - A. Consolidation of Archives services
    - 1) Consolidate Government documents repository with Archives holdings
      - Nathanson recommended full-cost analysis
    - 2) Consolidate State Library or Government Research Services with Secretary of State
      - Schepke raised concern about “show-stoppers” narrative and language
      - Kate asked whether outlook changed depending on future budget; discussion about issue of what could be consolidated – some were not related to SOS
    - 3) Consolidate Web Presence
      - Group consensus in support of this option
    - 4) Consolidate reference services
      - Schepke: language-tweaking on “only State”
      - Kate posed again: If knew that there were continuing resources, would recommendation change?
  - B. Increased utilization of digital resources
    - 1) Collaboration on digitization of historical collections
    - 2) Consolidate web presence of Library and Archives for public access
    - 3) Collaborate with OUS or Orbis Cascade on licensing research databases
  - C. Summarized remaining options and recommendations
- Nathanson raised concerns about funding: for every possibility, how would we organize if starting “from scratch”?

##### *2. Law Libraries (Bowie)*

- Cathryn discussed basic issues, pros and cons for each, and recommendations of subgroup
  - A. Increased utilization of digital resources
    - 1) Continue to look for digital alternatives to high cost print versions

- Recommendation: yes. Digital format is the future
    - 2) Digitize unique resources at State Law Library and State Library
      - Recommendation: yes. Pros outweigh cons
    - 3) Collaborate on Proxy Service
      - Definition of proxy service: prevents unauthorized use of library resources; State Law Library has one, State Library does not
      - Recommendation: yes. Pros outweigh cons
  - B. Elimination of the duplicate state subscriptions and subscription services across state agencies
    - 1) Require agencies (by DAS rule) to consult with the law library and State Library Government Research Services before purchasing information resources
      - Recommendation: yes
    - 2) Formalize consultative process between Law Library and Government Research Services
      - Recommendation: yes
  - C. Consolidation of services of the State Library, Higher Education libraries, and State Law Library
    - 1) Consolidate State Library's Government Research Services with the State Law Library
      - Recommendation: no; cons outweigh pros
    - 2) Consolidate web presence of Government Research Services and the State Law Library
      - Recommendation: yes; very beneficial, cost-effective direction for both libraries
  - D. Development of public/private partnerships for library, law library, and archive services
    - 1) Evaluate Ancestry.com partnership for possible expansion to other libraries and archives
      - Recommendation: yes
      - Sam recommended an inventory be done
    - 2) Explore membership in Orbis Cascade Alliance for Law Library and State Library Government Research Services
      - Recommendation: yes
      -
    - 3) Outsource Law Library and Government Research Services to Willamette University libraries
      - Recommendation: no
      - Justice Balmer clarified what was meant by "drafting" and confidentiality issues
- 3. *Talking Book and Braille Library Services (Scheppke)*
  - Jim summarized subgroup and referred to summary
  - In first meeting, group identified (12) options (below)
    - 1) Phase-out the cassette program in the near term
    - 2) Phase-out mailing digital talking books in near term and require all customers to download their own books using BARD
    - 3) Consolidate the TBABS program with the Oregon Commission for the Blind
    - 4) Collaborate with other states in building digital book collections
    - 5) Work with the LOC to retrofit the digital talking book players for self-service wireless delivery (similar to Kindle) in long term
    - 6) Phase out providing digital talking book players to customers in favor of other devices they could purchase
    - 7) Encourage LOC to enable all types of consumer devices to play digital talking books
    - 8) Discontinue talking book and Braille services and provide library service to blind and print-disabled Oregonians from local public libraries
    - 9) Move to a regional (multi-state) model for delivery of talking book and Braille services
    - 10) Move to a self-service model that eliminates the ability to consult with staff about book selections

- 11) Introduce talking book and Braille services to all Oregon children who might benefit from the Individualized Family Service Plan/Individualized Education Plan
- 12) Limit talking book and Braille services to the senior market segment

*III. Next Steps*

- Kate reiterated need for stakeholder input and finalization of recommendations

*IV. Meeting Dates – full and subcommittees*

- Library and Archives (and) Talking Book have one more meeting

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