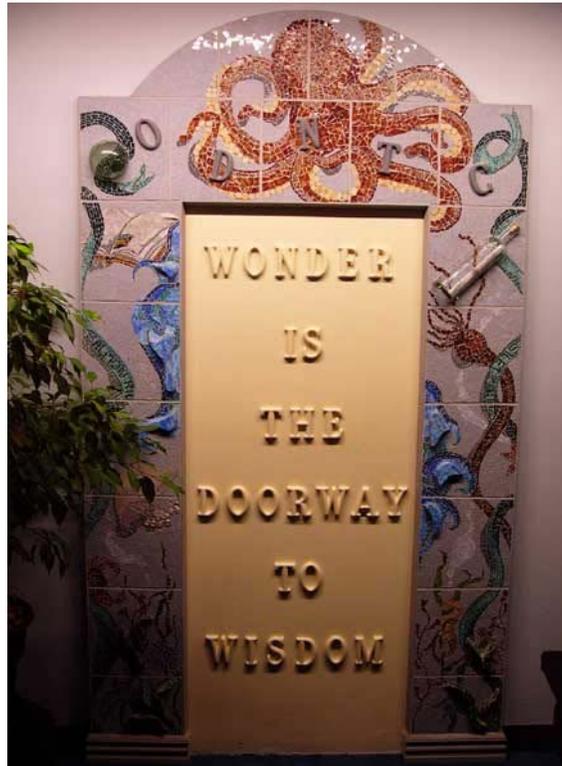


OREGON STATE LIBRARY BOARD OF TRUSTEES

Agenda Packet



August 15, 2014
Driftwood Public Library
801 SW Hwy 101, #201
Lincoln City, OR

TABLE OF CONTENTS

Agenda/Minutes	1
Reports of the State Librarian and Staff	17
New Business	25
Miscellaneous Information	101
Correspondence	105

AGENDA MINUTES



Oregon

John A. Kitzhaber, MD, Governor

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August 6, 2014

FOR IMMEDIATE RELEASE

The Oregon State Library Board of Trustees will meet at the Driftwood Public Library in Lincoln City, OR on August 15, 2014 from 9:00 a.m. to 4:00 p.m. Aletha Bonebrake of Baker City will chair the meeting.

The focus of the Board meeting is strategic planning. There will be an open forum at 12:30 p.m. Anyone may address the Board on any topic at the open forum.

Sign language interpretation will be provided for the public if requested prior to 48 hours before the meeting; notice prior to 72 hours before the meeting is preferred. Handouts of meeting materials may also be requested in alternate formats prior to 72 hours before the meeting. Requests may be made to Jessica Rondema at 503-378-2464.

OREGON STATE LIBRARY BOARD OF TRUSTEES MEETING

August 15, 2014
 Driftwood Public Library
 Lincoln City, OR
 Aletha Bonebrake, Chair

Agenda

9:00 a.m.	Approval of the Minutes of the June 20, 2014 Meeting	Bonebrake
9:05	Introductions	
9:15	Major Themes	Corragio Group
10:00	Developing a Vision	Corragio Group
11:00	Break	
11:15	Creating Our Mission Statement	Corragio Group
12:15 p.m.	Working Lunch	
12:30	Open Forum**	Bonebrake
1:15	Defining our Role of Value	Corragio Group
2:15	Break	
2:30	Defining our Desired Reputation	Corragio Group
3:30	Review day and close session	Corragio Group

** Any person may address the Oregon State Library Board of Trustees at this meeting on any topic.

NOTE: The times of all agenda items are approximate and subject to change.

Remaining 2014 Board Meeting Dates and Locations

- October 17th in the Oregon State Library in Salem
- December 11th and 12th at the Oregon State Library

Oregon State Library
BOARD OF TRUSTEES MEETING
June 20, 2014
Monroe Community Library, Monroe

Board members present: Ebonee Bell, Aletha Bonebrake, Sam Hall, Susan Hathaway-Marxer, Ismoon Hunter-Morton, Ray Miao.

Guests present: None.

Staff present: MaryKay Dahlgreen, Margie Harrison, Shawn Range, Jessica Rondema, Susan Westin.

Chair Aletha Bonebrake called the meeting to order at 10:02 a.m.

APPROVAL OF MINUTES

Hathaway-Marxer moved to approve the minutes from the April 16, 2014, Board meeting. Miao seconded. The motion passed unanimously.

REPORTS OF BOARD CHAIR AND TRUSTEES

Executive Committee Report

Board members reviewed this report in the agenda packets.

Nominating Committee Report

Hall, Bell, and Miao recommend that the current officers continue for the year. **Hall moved that Bonebrake continue as Chair and Hathaway-Marxer continue as Vice Chair. Miao seconded. Motion passed unanimously.**

Budget Committee Report

Shawn Range reported that we received our second year of funding for the biennium. We have also submitted our legislative concept for the changes to the Ready to Read Grant program. As soon as we receive the draft from the legislative counsel, we will have 72 hours to pay the invoice and respond to the draft with any changes. This part of the budget process concerns statute changes, relating to the Reading for Success program. Range handed out a document illustrating our proposed changes for our key performance measures. These measures will focus more on outcomes rather than outputs. Some of the measures that we are proposing to remove will still be tracked internally.

At the Board Budget Committee meeting, the group discussed a few different policy option packages. We can only ask for 20% over our current service level, which is the amount we received last year, plus inflation. The first policy option package is a request to fund the TBABS SLS1 position with general funds. About one third of the 20% would go toward funding the SLS1. If this position is funded with general fund in our adopted budget, it will remain funded by general fund. The second policy option package is a request to move dollars from GRS to Library Administration for the three IT positions. Legislative Fiscal Office wanted to see this shift reflected in a policy option package rather than simply moving the IT positions in the base budget and moving all Services and Supplies in a technical adjustment package. The changes associated

with the new Reading for Success program are the third policy option package. These include raising the minimum grant from \$1,000 to \$1,200 and including teens ages 15- 17. This would reduce the amount per child to 85 cents, as opposed to 94 cents per child.

The Governor's Recommended Budget will be released in December. After we submit our budget request in August, the Governor's staff will work with the Governor to decide what to include in his recommended budget. That will be presented to the Legislature during the 2015 Session and they will adopt the final budget.

Our highest priority policy option package is the funding of the SLS1 position. Miao asked what will happen if the Legislature decides not to fund the SLS1 position. Range explained that there is money to continue the position for only one more year. Westin responded that they would need to look at services and reprioritize duties. Certain current functions may need to cease.

Dahlgreen and Westin have discussed and agreed to use donations funds to continue to fund the position through the end of the biennium, even though it will draw the funds down very low. We have until June of next year to see if we will receive the funds.

Hunter-Morton moved to approve the Oregon State Library budget. Bell seconded. The motion passed with an abstention from Miao and an abstention from Hall.

Other Board Reports

Miao reported that the Deschutes Public Library Foundation has been bringing in many non-fiction authors for their events. The foundation is finally in the black in terms of money. These topical, non-fiction authors tend to bring in larger audiences than the fiction authors.

Bell reported that Sharon Draper was phenomenal and the event at Multnomah County Library was very successful. The Foundation was pleased. Bell also talked about her new additional job duty of visiting teens in jail. She wants to bring local authors to visit them as well. The teachers have noted that the kids have started reading on their own since she has been visiting. There is a potential for a lot of positive change.

Hunter-Morton has a new supervisor, Ariel Yang, at the Forest Grove City Library, who previously managed a library in Queens. The Cascade AIDS project, an Oregon Heritage grant-funded program, is beginning to digitize its collection. Hunter-Morton has been transcribing many oral histories.

Bonebrake reported that she has been down to Salem twice since the last Board meeting. She and Dahlgreen attended a board training put on by the Department of Administrative Services. It was a very informative training about administrative excellence and managing boards. It also introduced them to resources that are available. Bonebrake also visited Salem to attend the E-Board subcommittee hearing. Dahlgreen and Bonebrake will be meeting with Senator Betsy Johnson in the near future to discuss the changes that have been made at the State Library to date.

Hall reported that the Salem Public Library Foundation has raised the money to renovate the children's room. However, the project is on hold because the city council is considering an idea to turn the library building into a police station, moving the library elsewhere. The current police station building is too small and is not seismically sound. On Monday, the city council will decide whether to invest time and money to study this option. Salem Public Library's music program went very well, and they are planning for another year.

Hathaway-Marxer reported that Vailey Oehlke, the director of Multnomah County Libraries, was elected to be the next president of the Public Library Association, a division of the American Library Association. There was a large district meeting on Monday in Multnomah County. The voters have approved of the new district, making Multnomah County Libraries independent of the county. There are a number of difficult issues including liability issues regarding the transfer of physical assets.

REPORTS OF THE STATE LIBRARIAN

Activities Since the Last Meeting

The expenditures to date appear on page 23 of the agenda packet. The numbers appear different than usual, because this was before we received our second year of funding for the biennium. The next budget report will show two years of funding.

The quarterly performance report shows that Library Development's amounts are leveling out. TBABS has fewer volumes added, which is a result of promoting digital downloads. In GRS and TBABS, we are trying to determine how to use volunteers most effectively. In GRS, the amount of outreach and training presentations should be higher in the future. We will no longer be handling the Oregon.gov search box, so this measurement will not apply. We are still involved in the eGovernment process, but we will not be administering the search engine.

Harrison reported that we have a subscription to LibGuides, which is an out-of-the-box content management system that is easy to use, and we are working with agencies to develop resource pages. So far, it has not been tracked the same way as the formal outreach sessions. GRS will begin to track these activities, to be sure that their efforts are reflected in these statistics.

Miao asked if there is a way to track the value or outcome of the training. Harrison answered that we can survey the state employees to see if they have increased their use of resources after training or outreach.

Hunter-Morton wonders if there is a way to measure instruction, which is part of outreach.

GRS Advisory Council member Dan Postrel is the communications person at the Department of Forestry. He has been asked to be the State Library user on the Legislative Work Group. The other two people who have been appointed so far are Janet Webster from OLA and Eugene Newbill from SEIU. Dahlgreen has been regularly checking in with John Borden about the work group. There is no new information to report.

Dahlgreen attended ALA's National Library Legislative Day with members from OLA, including Sara Charlton, Jane Corry, Abigail Elder, Susan Stone, and Candice Watkins. The group met with legislative aides, in addition to with Representative Bonamici herself. Dahlgreen publicly thanked Rondema for scheduling these meetings, which can be difficult. The event went very smoothly. The group brought packets of information to distribute about how we use our LSTA funds in Oregon.

The Emergency Board meeting occurred on May 30th, following the Subcommittee on General Government hearing on May 29th. Dahlgreen shared a number of activities that the State Library has accomplished. She also spoke with Speaker of the House Representative Kotek and Representative Buckley, who is a co-chair of the subcommittee, prior to these meetings. They were both very receptive to the information Dahlgreen conveyed. Dahlgreen also shared the

information with Representative Nathanson. At the hearing on May 30th, Representative Nathanson acknowledged the progress being made by the State Library. Three senators voted against restoring the second year of our budget.

The Board Executive Committee met after the E-Board Subcommittee Meeting and agreed to move forward with the strategic plan. We anticipate working on this parallel to the Legislative Work Group, since they will be looking at statutes and broader issues.

Oregon Humanities is not able to take on the Center for the Book. Dahlgreen is planning to work with Susan Westin and Katie Anderson to convene a meeting of literary organizations including Literary Arts, Oregon Humanities, and the Oregon Arts Commission, to look at the tasks, rather than the entire program. She will also talk with John Cole, director for the Center of the Book in the Library of Congress. Dahlgreen hopes to bring information back to the Board from this meeting with the literary organizations, for either the August or October meeting.

Dahlgreen is planning to attend the National Book Festival this year at the end of August. She is hoping to take Ferol Weyand, Consulting Assistant in Library Development, or Susan Westin.

On the second floor of the library is the Oregon Index, contained in the card catalog area. This was created by librarians at the State Library and around the state. It indexes information in newspapers and books about Oregon from the early part of the century until the 1980s. The biographical portion has already been digitized by Ancestry.com. We are working with the Department of Revenue to digitize the index cards using a high-speed check scanner. Alice LaViolette spearheaded this project and arranged the opportunity. There will be no cost to us. Revenue's check scanners are not constantly in use, and they can use this opportunity to train their own staff on how to use the scanners. What would have taken about 120 days will now take about 80 hours. We are looking at a variety of ways to make the images accessible and searchable. This is a good example of interagency cooperation.

Until recently, the Oregon State Library was in a consortium with Willamette University and State of Oregon Law Library (SOLL) for our integrated library system (ILS). However, Orbis Cascade is now only serving academic libraries. Last year, SOLL selected EOS as their ILS. Since we were no longer associated with either Willamette or the Law Library we extended the existing license with III (Millennium), which will expire in October. Harrison has been working with John Goodyear of Chemeketa Cooperative Regional Library Service (CCRLS). They have put out an RFP and have selected SirsiDynix, on the basis of cost and features. Harrison has been working with Goodyear to investigate the idea of OSL joining the contract with SirsiDynix, and is also working with SOLL to look into the possibility of joining with them using EOS.

Dahlgreen has asked Kevin Barclay from Deschutes Public Library and Darci Hanning from the Oregon State Library to create an Answerland task group. The group will talk to library directors about the concept of Answerland and virtual reference. It is currently unsustainable at \$300,000 a year. It has been difficult to find a fiscal agent, since there has been no business model. Hanning and Barclay will investigate options for providing and paying for statewide reference cooperative reference. They will provide Dahlgreen with options for her to bring to the Board discussion.

Hunter-Morton asked if there is a way to have two tiers of virtual reference, where there are lists of questions that others can answer as well as participate in live chat. Dahlgreen said that Answerland encompasses this in its software.

Arlene Weible and John Russell are putting together a group to look at the Digital Collections Report that was created last summer by Danielle Plumer using LSTA funds. They will be working with libraries from around the state to look at spending LSTA funds on digitization. Geoff Wexler of the Oregon Historical Society is convening a meeting to talk about digitization across institutions within the state with regard to prioritization and standardization.

Hunter-Morton asked if we connect to digital public library at the national level. Dahlgreen said that this is something we need to investigate.

Dahlgreen had the honor of attending Hermiston Public Library's 100th year anniversary celebration. Library director Marie Baldo found old letters that were exchanged between a prior library director and Cornelia Marvin, the first Oregon State Librarian, about which books to add to their collection. Marvin had suggested not including such books as *The Motor Boys*. Marie and her staff found a copy of *The Motor Boys* and presented it to the State Library.

Tomorrow, Dahlgreen is visiting Klamath Falls Library's opening of their new South Suburban Branch. She also recently visited Irrigon Branch of the Oregon Trail Library District. This new branch has been in the works for a long time. They used to operate out of a school bus. Now this building is attached to the city hall. They do not have their shelves in the library yet, so they have opened the cupboards in the meeting room to shelf the summer reading books.

Regarding the Plinkit Collaborative, we are still having discussions about how to move people onto other websites.

Every year, Ann Reed receives public library statistics from all over the state. The Institute of Museum and Library Services creates the Public Libraries in the United States Survey Report, FY 2011.

The research arm of the Institute of Museum and Library Services is increasing their focus on evaluations and has begun studying trends. Dahlgreen attended a meeting of the IMLS Statistics Working Group in Washington, D.C. earlier this week. IMLS researchers are investigating whether there is a relationship between loss of funding and decreases in circulation and other usage. Physical visitation is decreasing, but we need to find a way to measure virtual visitation.

Hall was surprised that internet use decreased. It might be because people are bringing their own devices. If there is a way to count wireless session, that would be valuable. Dahlgreen urged the Board members to read the entire statistics report to understand the full picture.

Dahlgreen has been having discussions with Liz Tice, president of the Willamette Valley Genealogical Society. They are considering shifting the reference room into more of a welcome center, since the room gets so little use. WVGS has provided us with a draft plan to staff the room with volunteers. Dahlgreen is envisioning having a genealogy volunteer at the desk during the room's open hours. We could also have other volunteers who could serve as docents, giving information about the state library, the artwork, etc. They discussed the idea of having part of the GRS staff move their office into the microfilm room, so they could be easily called if a state agency employee needs reference assistance. We currently staff the desk five days a week, which is not the best use of our human resources. Dahlgreen feels that we can house the genealogical society's collection if they provide us with volunteers to staff the room. They would need to pay if they want to continue Saturday hours, because we need to have the heat or air conditioning on and pay for at least one staff member to be present.

Harrison explained that half of GRS would move to the microfilm room, while those on the third floor would most likely move to the then-vacated second floor office. In that case, there would be savings and efficiencies. The team would all be on the same floor as well. We expect that a move will go forward, whether or not WVGS decides to go forward with their part of the plan.

The GRS Advisory Council met yesterday, and had a very energetic meeting. The new candidates whom the Board will vote on today include the public information officer from Forestry, the public information officer from State Lands, an archeologist from ODOT, and a strategic initiatives person from DAS. They discussed the resources that we have available to share with the citizens of Oregon. We have a beautiful library, the Forestry Department has a resource center, and the State Hospital has a museum. How do we work together to use these resources for Oregonians?

The Poetry Collection will be moving. University of Oregon is negotiating whether or not they will take it. Hunter-Morton requested that we have a list of the books that are in the Poetry Collection, so librarians can point people to it.

OPEN FORUM

No one was present to comment.

NEW BUSINESS

GRS Advisory Council Membership

Harrison reviewed the list of state employees who are being recommended to fill the Government Research Services Advisory Council positions. It is a very diverse group, with no duplication of representation from agencies. Hathaway-Marxer moved to approve the appointment of these state employees to the GRS Advisory Council. Hunter-Morton seconded. The motion passed unanimously.

Recommendations of the LSTA Advisory Council

The LSTA Advisory Council recommended inviting the five returning and nine out of the sixteen new FFY 2014 proposals to be fully developed for review in the fall. The Council also recommended funding two of the three FFY2013 Extending Services to the Unserved proposals. The third recommendation from the Council was to explore changing the LSTA grant cycle from a two-step process to a one-step process, to reduce lag time and allow the Council more time to evaluate and review projects. Wyma Rogers from the LSTA Advisory Council explained that many libraries did not have the skills to write grants years ago, so the extra time was necessary. Now libraries can partner with another library if they lack the expertise. A subcommittee of the LSTA Council has been created to develop and propose a one-step grant process. The Council might also propose to have some specifications that the libraries would follow, such as a certain focus for each grant cycle, based on the five-year plan. The Board would need to approve the Council's idea for a focus. The last recommendation was the Ebsco/Orbis Cascade subsidy proposal. With savings from the Gale/Cengage database contract, there were funds to apply to a product of interest to the academic libraries. The SDLAC recommended subsidizing academic libraries access to Ebsco's Academic Search Premier via the Orbis Cascade Alliance.

Hall moved to approve the four recommendations from the LSTA Advisory Council. Hunter-Morton seconded. The motion passed unanimously. It was also suggested that the

Board have a member on the LSTA Council subcommittee that is exploring changes to the grant process. Bonebrake agreed to attend the first meeting.

Recommendations of the TBABS Advisory Council

Westin discussed the Talking Book and Braille Donation Fund Expenditure Plan for 2014-2015. Although we are requesting that the State Library Specialist 1 position be moved back to general fund in our 2015-2017 Budget request, we are asking for one more year of funding from the donation fund for this position for now. We are also requesting funds to pay for providing the League of Women Voter's Guide for our patrons, which was previously paid for with a grant from the Secretary of State. Westin reviewed the Expenditure Fund Cash Flow Analysis with the Board.

Hunter- Morton moved to approve the TBABS budget. Hathaway-Marxer seconded. The motion passed unanimously.

Hathaway-Marxer suggested that each Board member contribute \$100 (or a portion thereof) to TBABS. She will match the funds.

Strategic Planning

At the Executive Committee meeting at the end of May, the group decided to continue to develop a strategic plan. Bonebrake feels that we need a professional strategic planner. We have the skill set in the library, but someone with an outside point of view would be best equipped to lead us through this task and help us develop a useful, credible product.

Hunter-Morton agreed that having a professional would be very beneficial.

The state has five or six contracts with consulting companies. We can develop an RFP. Dahlgreen's estimate for the cost is between \$20,000 and \$30,000.

Dahlgreen listed the materials and documents that have been developed during the reorganization/transformation process. We need the professional expertise to consider these documents and help us determine our mission, vision, goals, and objectives.

There is a large disconnect between the State Library's statute, our mission, and our current practice. Dahlgreen has developed a matrix to show these discrepancies. We should be able to consult our mission before taking on a new project, to see if it is appropriate for the State Library.

Bonebrake said this will take a full day commitment with a facilitator. She asked the Board members if they are willing to commit to this.

Hall asked about the time schedule and when we want to have this reorganization finished. He is afraid that looking for someone to assist us will take too much time. He feels that we need to report to the Governor's staff in September or October the progress we are making.

Dahlgreen said that the Legislative Work Group is an unknown at this point. There are common themes in all the work that has been done. She is hoping we can develop this plan in tandem, where the strategic plan comes from the Board and the statutory changes come from the work group. Dahlgreen suggested that the August meeting of the Board be a strategic planning session.

Bonebrake said that we have been asked by Legislators about our plan. It will be great to have something started in August. We are now engaging ourselves in this conversation.

Hunter-Morton would like to see us act now. We do not need more processing time.

Dahlgreen feels that she and the managers know what they want the State Library to look like. A number of staff are bought into that vision. We are moving to online trainings, establishing relationships with other agencies, and we are moving forward. Dahlgreen proposes that we find someone who will look at all the work we have done, help us develop a plan, and create a draft. We can have the Board look at the plan in October. Dahlgreen and Bonebrake can take that plan to the Legislature to show them our progress.

Dahlgreen needs the Board to tell her what direction they want her to move in. Do they want us to be a library for state government, for local libraries, for talking book and Braille, or a public library?

Dahlgreen envisions the following for the State Library: GRS (Government Research Services) will have a new name. It will consist of a cadre of people who provide information services for state agency staff in a variety of ways. They train people to use the material. It will be very straight-forward. She wants the State Library to provide good library service to as many state employees as need it. She wants the State Library to provide Talking Book and Braille services to as many Oregonians as are eligible. She wants the State Library to provide support, grants, and other assistance to local libraries.

Hall agrees with this in principle, and fully agrees that we have done the background work. He agrees to spend money to get a professional to assist us. He thinks we should do this for our August meeting.

Bonebrake mentioned the comment from one of our staff that encouraged us to think of ourselves as a 21st century state agency that leads libraries to the 21st century. Bonebrake is talking about getting a streamlined document that defines us. Some of the decisions we have made resulted from brainstorming sessions, as opposed to a refined definition of a strategic plan.

Dahlgreen asked that the Board get together with a facilitator to talk about the vision and mission of the State Library. The Board should be able to say to Dahlgreen and the staff what the State Library is about, and the staff will make it a reality. She wants to see the Board work with a facilitator, with the managers present, to help us move through the steps to create a vision and a mission. She thinks we could hire someone to assist the Board during their meeting in August. The Board would need to be very familiar with the statutes. The Board usually has very little business for the August meeting. Therefore, we can spend the day focusing on this work.

Hunter-Morton commented that creating a vision and a mission is what policy boards do. She hopes everyone will be willing to be creative and ready to create a next-generation, cutting-edge, libraries-are-essential-in-a-democracy policy.

Bonebrake expressed appreciation for each of the Board members, the time they put in, and the work they do. She wants to see this reorganization through and show our commitment. Bonebrake requested that everyone commit to doing their homework to prepare for the August 15th meeting. Dahlgreen and Rondema will send out material to the Board a week and a half prior to the meeting.

Miao announced that he will not be continuing on the Oregon State Library Board of Trustees. Bonebrake thanked Miao for his service.

PLANS FOR NEXT MEETING

The next Board meeting is scheduled for Friday, August 15th at the Driftwood Public Library in Lincoln City.

Remaining 2014 Board meetings:

- August 15th at the Driftwood Public Library in Lincoln City
- October 17th in the Oregon State Library in Salem
- December 11th and 12th at the University of Portland

The meeting adjourned at 3:04 p.m.

ACTION ITEMS

- Dahlgreen will work with Range to develop an RFP for a professional facilitator/strategic planner.
- Rondema and Dahlgreen will send materials to the Board members in preparation for the August 15th Board meeting.



Oregon

John A. Kitzhaber, MD, Governor

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State Library Board Executive Committee
 Aletha Bonebrake, Chair
 July 29, 2014
 5:00 – 6:00 PM

Board members present by phone: Bonebrake, Hall, Hathaway-Marxer
 Staff members present: Dahlgreen

Report of the State Librarian

Dahlgreen reported that the library divisions have changed their names to reflect our efforts to provide better services for our patrons. They are: Government Information and Library Services; Library Support and Development Services; Operations Division, Oregon Talking Book and Braille Library. We have begun using the new names and will transition as rapidly as possible.

The 2015-2017 Agency Request Budget is nearly complete and will be submitted to the Chief Financial Officer on August 1, 2014.

Dahlgreen attended the OLA Board Annual Retreat at Silver Falls State Park. Jen Maurer was appointed by the president as the at-large member of the Board and Darci Hanning will be the Chair for the Library Technology Roundtable, both for the upcoming year.

All staff will participate in Maintaining a Professional Workplace: Confronting Bullying training from Enterprise HR Services. The first session was held on July 25th and the second session will be held on August 13th. The training is offered twice to accommodate all staff member's schedules.

Dahlgreen and Bonebrake have an appointment with Senator Betsy Johnson in Scappoose on Wednesday July 30th to discuss the State Library reorganization and get feedback from the Senator on her perspectives and expectations.

Approval of the Board Agenda for the August 15, 2014 Board meeting

Dahlgreen shared information about the meeting she and Shawn Range had with the selected strategic planning consultants, Corragio Group, earlier. They will provide the agenda for the August 15th meeting which will be devoted to the planning process. There was discussion about having an open forum and the members agreed this was important to include. Since our consultants will be providing the meeting agenda next week the Executive Committee took no action to approve this item.

Other Business

There was no other business.

Meeting was adjourned at 6:00 p.m.

REPORTS OF STATE LIBRARIAN AND STAFF

**OREGON STATE LIBRARY
2013-15 BIENNIUM BUDGET REPORT**

Report Month	June, 2014						
Target Percentage	50.00%						
Budget Object Title	Budget	Current Month Expenditures	Expenditures Biennium to Date	Remaining Budget	%Spent BTD	Average Spend per month to Date	Average Remaining to Spend
PERSONAL SERVICES	\$ 6,182,785	\$ 246,770	\$ 2,978,867	\$ 3,203,918	48.18%	\$ 248,239	\$ 266,993
SERVICES & SUPPIES	\$ 3,635,197	\$ 97,463	\$ 1,715,579	\$ 1,919,618	47.19%	\$ 142,965	\$ 159,968
CAPITAL OUTLAY	\$ 21,818	\$ -	\$ -	\$ 21,818	0.00%	\$ -	\$ 1,818
SPECIAL PAYMENTS	\$ 4,294,885	\$ 115,594	\$ 1,844,983	\$ 2,449,902	42.96%	\$ 153,749	\$ 204,159
TOTAL	\$14,134,685	\$ 459,828	\$ 6,539,429	\$ 7,595,256	46.27%	\$ 544,952	\$ 632,938

Monday, July 28, 2014

**OREGON STATE LIBRARY
2013-15 BIENNIUM BUDGET REPORT**

	Report Month	June, 2014						
	Target Percentage	50.00%						
Division Name	Budget Object Title	Budget	Current Month Expenditures	Expenditures Biennium to Date	Remaining Budget	% Spent BTD	Average Spent per Month to Date	Average Remaining to Spend
Operations	PERSONAL SERVICES	\$ 929,276	\$ 38,994	\$ 459,061	\$ 470,215	49.40%	\$ 38,255	\$ 39,185
	SERVICES AND SUPPLIES	\$ 176,283	\$ 7,648	\$ 75,855	\$ 100,428	43.03%	\$ 6,321	\$ 8,369
	CAPITAL OUTLAY	\$ 2,342	\$ -	\$ -	\$ 2,342	0.00%	\$ -	\$ 195
	Total	\$ 1,107,901	\$ 46,642	\$ 534,916	\$ 572,985	48.28%	\$ 44,576	\$ 47,749
Library Development	PERSONAL SERVICES	\$ 1,003,535	\$ 48,954	\$ 578,837	\$ 424,698	57.68%	\$ 48,236	\$ 35,391
	SERVICES AND SUPPLIES	\$ 1,473,211	\$ 13,432	\$ 767,188	\$ 706,023	52.08%	\$ 63,932	\$ 58,835
	SPECIAL PAYMENTS	\$ 4,294,885	\$ 115,594	\$ 1,844,983	\$ 2,449,902	42.96%	\$ 153,749	\$ 204,159
	Total	\$ 6,771,631	\$ 177,980	\$ 3,191,008	\$ 3,580,623	47.12%	\$ 265,917	\$ 298,385
Talking Book and Braille Services	PERSONAL SERVICES	\$ 1,165,808	\$ 42,720	\$ 507,672	\$ 658,136	43.55%	\$ 42,306	\$ 54,845
	SERVICES AND SUPPLIES	\$ 512,267	\$ 22,479	\$ 193,202	\$ 319,065	37.72%	\$ 16,100	\$ 26,589
	CAPITAL OUTLAY	\$ 8,783	\$ -	\$ -	\$ 8,783	0.00%	\$ -	\$ 732
	Total	\$ 1,686,858	\$ 65,199	\$ 700,874	\$ 985,984	41.55%	\$ 58,406	\$ 82,165
Government Research Services	PERSONAL SERVICES	\$ 3,084,166	\$ 116,103	\$ 1,433,297	\$ 1,650,869	46.47%	\$ 119,441	\$ 137,572
	SERVICES AND SUPPLIES	\$ 1,473,436	\$ 53,904	\$ 679,334	\$ 794,102	46.11%	\$ 56,611	\$ 66,175
	CAPITAL OUTLAY	\$ 10,693	\$ -	\$ -	\$ 10,693	0.00%	\$ -	\$ 891
	Total	\$ 4,568,295	\$ 170,007	\$ 2,112,631	\$ 2,455,664	46.25%	\$ 176,053	\$ 204,639
Total		\$ 14,134,685	\$ 459,828	\$ 6,539,429	\$ 7,595,256	46.27%	\$ 544,952	\$ 632,938

Monday, July 28, 2014

**OREGON STATE LIBRARY
2013-15 BIENNIUM BUDGET REPORT**

		Report Month	June, 2014							
		Target Percentage	50.00%							
Program Code	Program Code Title	Budget Object Title		Current Month Expenditures	Expenditures Biennium to Date	Remaining Budget	% Spent BTD	Average Spent per Month to Date	Average Remaining to spend	
1200	OSL BOARD	PERSONAL SERVICES	\$ 1,900	\$ 98	\$ 591	\$ 1,309	31.11%	\$ 49	\$ 109	
		SERVICES AND SUPPLIES	\$21,709	\$ 1,915	\$ 9,225	\$ 12,484	42.49%	\$ 769	\$ 1,040	
		Total	\$23,609	\$ 2,013	\$ 9,816	\$ 13,793	41.58%	\$ 818	\$ 1,149	

Monday, July 28, 2014

**OREGON STATE LIBRARY
2013-15 BIENNIUM BUDGET REPORT**

Agency Title Report Date	OREGON STATE LIBRARY 7/30/2013	OREGON STATE LIBRARY 7/28/2014	OREGON STATE LIBRARY 8/2013 to 8/2014	
Accounts	Account Title	Cash Balance	Cash Balance	12 Month Change
TBABS ENDOWMENT FUND INTEREST	CASH ON DEPOSIT WITH TREASURER 0300	\$ 29,994.27	\$ 26,060.81	\$ (3,933.46)
TBABS ENDOWMENT FUND	CASH ON DEPOSIT WITH TREASURER 0301	\$ 1,107,696.20	\$ 1,404,744.03	\$ 297,047.83
LONG FUND - NON EXPENDABLE	CASH ON DEPOSIT WITH TREASURER 0302	\$ 1,000.00	\$ 1,000.00	\$ -
MOSES FUND - NON EXPENDABLE	CASH ON DEPOSIT WITH TREASURER 0303	\$ 6,000.00	\$ 6,000.00	\$ -
LONG FUND - EXPENDABLE	CASH ON DEPOSIT WITH TREASURER 0306	\$ 27.16	\$ 32.65	\$ 5.49
MOSES FUND - EXPENDABLE	CASH ON DEPOSIT WITH TREASURER 0307	\$ 8,345.02	\$ 8,167.54	\$ (177.48)
TBABS DONATION FUND	CASH ON DEPOSIT WITH TREASURER 0308	\$ 157,150.28	\$ 165,469.53	\$ 8,319.25
DATABASE LICENSING RESERVE	CASH ON DEPOSIT WITH TREASURER 0321	\$ 40,055.38	\$ 40,271.83	\$ 216.45
TOTAL		\$ 1,350,268.31	\$ 1,651,746.39	\$ 301,478.08

Monday, July 28, 2014

OREGON STATE LIBRARY QUARTERLY PERFORMANCE REPORT

Quarter: April – June, 2014

	<i>Total This Quarter</i>	<i>Total 13-15 to Date</i>	<i>Total 11-13 to Date</i>	<i>Variance to Date</i>	<i>% Variance to Date</i>
<i>Library Support & Development Services</i>					
Average daily visits to OSLIS	2,771	2,588	1,850	738	39.9%
Average daily visits to LSTA-funded databases	15,106	13,725	14,173	-449	-3.2%
Average daily visits to L-net	88	94	98	-4	-3.8%
Average daily visits to Plinkit websites	11,150	9,492	5,478	4,014	73.3%

Oregon Talking Book and Braille Library

Registered individuals*	5,163	5,163	5,333	-170	-3.2%
Registered institutions*	388	388	327	61	18.7%
Items circulated	108,841	425,320	434,403	-9,083	-2.1%
Percentage of circulated items that are digital cartridges	79%	79%	72%	7%	9.7%
Percentage of circulated items downloaded from BARD	19%	20%	16%	4%	25.0%
Volumes added	4,173	18,480	20,702	-2,222	-10.7%
Volunteer hours	300	1,301	1,883	-582	-30.9%

**Figure represents total on the last day of the quarter.*

Government Information & Library Services

Research transactions for state government employees	1,932	8,158	9,037	-879	-9.7%
Contacts with state government employees	146,937	570,668	478,419	92,249	19.3%
Percentage of state employees registered for State Employee Information Center*	26%	26%	23%	3%	13.0%
Average daily visits to Oregon.gov search box	3,333	3,610	4,257	-647	-15.2%
Mailing list subscribers*	748,036	748,036	680,874	67,162	9.9%
Outreach and training presentations to state agencies	8	32	38	-6	-15.8%
Oregon documents archived	3,495	11,939	10,810	1,129	10.4%
Volunteer hours	1,018	3,713	4,340	-627	-14.4%

**Figure represents total on the last day of the quarter.*

NEW BUSINESS

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

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 Mary Beth Herkert, State Archives 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) Cathryn Bowie, State Law Library 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 Jim Scheppke, State Library 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.

Oregon State Library Draft Reorganization Framework and Timeline

March 14, 2013

In Governor Kitzhaber's Balanced Budget for 2013-2015, the Oregon State Library (OSL) was directed to reorganize in order to create a service delivery model that will minimize fragmentation and duplication of services in state government. A framework and timeline have been created and a detailed implementation process will be put in place by the end of the 2011-2013 biennium. An implementation progress report will be provided to the Legislature in February of 2014. Upon acceptance of that report, it is anticipated that OSL will receive the second year of biennial funding. The reorganization will be complete by the beginning of the 2015-2017 biennium.

This document outlines the draft framework and timeline. It contains the following elements:

- ✓ Assumptions
- ✓ Current Responsibilities
- ✓ Reorganization Steering Committee Activity and Recommendations
- ✓ Timeline

Assumptions

The reorganization of the Oregon State Library is part of a larger ten-year state government transformation agenda articulated in Governor Kitzhaber's Balanced Budget. There are certain assumptions as to processes and deliverables that have guided the current work and will guide the implementation process.

- The State Library will be reorganized.
- Some services will be consolidated with other agencies.
- New state funding will not be available but resources may be shifted.
- Services will be more efficiently administered and add more value to recipients.
- The resulting plan will advance improvements in state government administration aligned with the 10-Year Plan.
- Employees and key stakeholders will be engaged and consulted throughout the process.
- Any transition of employees will be carried out in accordance with both the spirit and letter of Public Employee Collective Bargaining Act rules.
- New service delivery models may mean that some long-standing programs will no longer be offered and existing programs that continue may see changes.
- OSL Board of Trustees will be integral to the process.

Current Responsibilities

- A. Timely and accurate information is essential to Oregon state employees and the Legislature in serving Oregonians. OSL is the enterprise-wide information resource.
- B. The State of Oregon, in cooperation with the National Library Service for the Blind and Physically Handicapped, can and should provide library services to print-disabled Oregonians.
- C. The Oregon State Library, in cooperation with the Institute of Museum and Library Services, can and should provide grants, support, and leadership for local libraries.

Reorganization Steering Committee Activity and Recommendations

The primary activity of the Reorganization Steering Committee has been to review the current services of the State Library in depth and determine essential services. The essential services that are recommended are:

- *Connect Oregon state government to quality information to support informed decision-making on behalf of all Oregonians.*
- *Connect print-disabled Oregonians to reading materials and other information to improve their quality of life.*
- *Connect Oregonians to library services by providing leadership, grants (including federal Library Services and Technology Act funds and state Ready to Read funds), and other support to public, school, academic, and tribal libraries.*

In developing these three essential services, the Reorganization Steering Committee reviewed all current services of the State Library. This review included examining resources required, statutory requirements, and the audiences served (both whom and how many).

In addition to the work of the Reorganization Steering Committee, OSL staff conducted surveys of their specific stakeholders to gather feedback about the use and value of current services. State Library staff was provided with an opportunity to participate in focus groups to gather their perspectives on use and value of current services.

The Reorganization Steering Committee has agreed that the State Library responsibilities should remain unchanged. In looking at services currently offered, the above noted services are essential to meet those responsibilities.

OSL Reorganization Steering Committee Recommendations

From	To
Full-service research assistance	Self-service research access to centralized, curated information resources.
Manual and mail distribution of TBABS materials	Adapting delivery models to new technologies
Ad hoc support of early learning	Intentionally included in educational reform
State government documents at OSL	State government documents at Archives
Broad current services	Focused essential services
Dispersed impact	Collective impact
Paper-based/physical	Digital/virtual
Ad hoc multiple collections	Coordinated collection management
Confusion about definitions/responsibilities for publications vs. public records	Agreed upon clarity of purpose
You come to the library	We get it to you
Just in case	Just in time
Traditional image	Modern reality



Oregon State Library Transformation Project
Report to the Interim Joint Committee on Ways and Means
September 6, 2013

DRAFT

Oregon State Library Transformation Project
Report to the Interim Joint Committee on Ways and Means

DRAFT

September 6, 2013

CONTENTS

Executive Summary	Page 3
The Ten Transformational Changes	Page 10
1. Library Services to State Government	Page 10
2. Library Services to the Public	Page 12
3. OSL Oregon Heritage Materials Collections	Page 14
4. Non-Government Materials Collections	Page 15
5. TBABS Service Model (Talking Books and Braille Services)	Page 16
6. Search Engine Administration for State of Oregon website (ie. Oregon.gov)	Page 18
7. State of Oregon Documents	Page 19
8. Oregon Center for the Book	Page 21
9. Cultural enrichment for state employees	Page 22
10. PLINKIT (Websites for public libraries)	Page 23
The Seven Enhancement Changes	Page 24
1. Library Development Consulting with Local Libraries	Page 24
2. TBABS Fundraising (Talking Books and Braille Services)	Page 25
3. Library Youth Services Program	Page 26
4. Oregon Library Statistics	Page 27
5. Alternative Funding Sources (e.g., Grant Writing & Other Funding)	Page 27
6. Statewide Online Databases for Libraries	Page 28
7. State Library Volunteers and Interns	Page 29
Summary and Conclusion	Page 31
Appendix 1	Page 32
Appendix 2	Page 36

Executive Summary

Introduction

This Report addresses the May 2013 mandate from the Legislature:

The State Library and the Department of Administrative Services are directed to submit to the Legislature in February of 2014 a detailed strategic business plan for the reorganization of the State Library. The two agencies are directed to report to the Joint Committee on Ways and Means throughout the interim on the reorganization planning efforts.

Accordingly, to develop a strategic reorganization plan, the State Library and the Office of the Chief Operating Officer of the Department of Administrative Services organized a project team with work groups and an advisory committee of State Library stakeholders. Their work takes a two stage approach: Phase 1 – Analysis of Library Service Delivery Alternatives, and Phase 2 – Develop a Transformation Implementation Plan.

This Phase 1 report presents to the Joint Committee on Ways and Means a set of service delivery alternatives for State Library services. The response of the Committee will set the stage for the Phase 2 development of an implementation plan.

Objectives of the Report

The content of this report:

1. Presents an analysis of current library services and why change is needed
2. Identifies practical service delivery alternatives for current services
3. Requests direction from the Joint Committee on Ways and Means (JCW&M) regarding the service delivery alternatives

Action Requested of the Joint Committee on Ways and Means

In light of the JCW&M's perspectives on the overall direction of state government, the sponsors of the report request the Committee's directions on its preferred service delivery alternatives for each of the Ten Transformational Changes and the Seven Enhancement Changes described in the report.

Upon receipt of the preferred service delivery alternatives for the Transformational and Enhancement Changes, the report sponsors will build an implementation plan to operationalize the recommendations. This detailed plan for transforming Oregon State Library (OSL) services from the current state to the future state will be presented in November 2013.

The steps are outlined in the table below:

Stage	Activity	Purpose	Date
Stage 1	Analysis of OSL Transformation Service Delivery Alternatives based on Current State*	For review by the <i>Interim Joint Committee on Ways and Means</i> to obtain Legislative direction on the most appropriate transformations for OSL	September 2013
Stage 2	Development of an Implementation Plan	To identify the activities and resource requirements related to transforming OSL from its current state to the desired	November 2013

		future state	
Stage 3	Approval of Implementation Plan	To provide the context of policy and administrative authority to implement changes.	February 2014
Stage 4	Initiation of Implementation Plan	OSL initiates its implementation projects.	March 2014 and beyond

* Analysis based on work groups, advisory committee, project team, customer surveys and previous reports

Transformation Process and Participants in Developing this Report

The transformation process employed in developing this report had four important aims:

- a. Utilize the findings of previous reports and surveys
 - b. Include a broad spectrum of library users and stakeholders
 - c. Draw into the report the best practices or insights of stakeholders
 - d. Conduct the process with a professional project management discipline
- a. Previous Reports and Surveys
- The participants in the project drew insights from the following previously prepared reports:
- [Workgroup on Libraries & Archives in Oregon State Government](#), February 2012 Report
 - [Envisioning Oregon](#): Planning Toward Cooperative Collection Development in Oregon Historical Repositories, August 2009
 - Oregon State Library Reorganization Framework and Timeline, March 2013
 - Oregon State Library Staff Focus Group Feedback, February 2013
 - Government Research Services Customer Survey Summary, February 2013
 - Library Development Services Customer Survey Summary, February 2013
 - Talking Book and Braille Services Customer Survey Summary, February 2013

b. Participants and Stakeholders

Contributions to the analysis in this report were made by:

- The OSL Board of Trustees
- An Advisory Committee consisting of senior level staff from agencies and leaders of organizations that work with OSL
- A Project Team of OSL managers and staff that led the analytical work and processed its findings into this report
- Six Work Groups of OSL employees, service customers, and other users representing the following perspectives:
 - Services to State Government
 - Services to Libraries and Oregonians
 - Collections
 - Technology
 - Finance
 - Internal Organization and Culture
- Project Sponsors and Leaders from the Oregon State Library and the Department of Administrative Services

The participants are listed in Appendix 2, Participants and Stakeholders, page 36.

c. Best Practices and Insights of Stakeholders

The project leaders organized the work as follows:

- Created the list of current services and categorized into 3 areas:
 - Services to state government
 - Services to public
 - Collections
- Assigned work groups to each area:
 - Defined assessment criteria
 - Analyzed current services
- Commissioned a project team of library staff that:
 - Reviewed previous reports and work group results
 - Identified practical service delivery alternatives for current library services
 - Classified levels of transition of services as Transformational Changes or Enhancement Changes
- Organized work groups of staff and library customers that:
 - Contributed best practices from their experience with other institutions, other state libraries, and industry trends
 - Analyzed current services, recommended service delivery alternatives, and defined considerations and implications
- Involved stakeholders in reviewing findings through:
 - Weekly email updates of the progress of the work groups and project team
 - Monthly reviews with the Advisory Committee, the OSL Board, and SEIU union representatives
 - Individual meetings with other stakeholders

d. Professional Project Management Discipline

- The process leading to the development of this report was conducted with rigorous attention to professional standards of project management as documented in the [Oregon State Library Transformation Project Plan](#)

Structure of the Report

Employing the above described process, the project team arranged the current services of OSL into two groups:

- Ten Transformational Changes (of large scale or significant impact)
- Seven Enhancement Changes (of smaller impact or scale)

Each of the service delivery alternatives is profiled in the following categories:

- Description of Current Services
- Need for Change
- Service Delivery Alternatives
- Anticipated Outcomes
- Considerations
 - Financial – In broad terms, possible financial implications of various service delivery alternatives

- Organizational – Need for change management and possible organizational impact of service delivery alternatives
- Technological – In broad terms, possible technology implications of various service delivery alternatives

The profiles have been designed to provide sufficient information to assist in recommending service delivery alternatives while maintaining reasonable brevity.

Overview of Transformation

This overview of transformation provides the framework for our strategic business plan for the reorganization of the State Library. It specifically addresses why transformation is necessary, key considerations in making major changes, and a summary of the Oregon State Library service delivery alternatives. The following four guiding principles helped the Oregon State Library identify and define service delivery alternatives for consideration:

1. We need to evaluate our business model and make sure we are meeting the needs of our customers
2. We need to ensure that we are delivering the highest value services with the limited resources available
3. We need to ensure that funding streams are appropriate for services being funded and services add value for agencies being assessed
4. We need to stop talking about making changes called for in previous efforts and start actually implementing the changes necessary for transformation

Mission Statement

The mission of the State Library is to provide quality information services to Oregon state government; to provide reading materials to blind and print-disabled Oregonians; and to provide leadership, grants, and other assistance to improve library service for all Oregonians.

Why Transformation is Necessary

The Oregon State Library has evolved over time, similar to other Oregon state agencies. Established to support local libraries and Oregonians, it has grown and evolved organically over the decades. It has been driven by the ever-changing needs of the public, by policies, and by the vision of each administrator over the years. It is no surprise that today the Oregon State Library is a composite of these years of evolution. It is also no surprise that it is time for a strategic business plan for the reorganization of the State Library, as mandated in May 2013.

Public libraries in general and state libraries especially, are facing the largest sea change in how they serve the public since the massive startup for publically run libraries driven by Carnegie at the turn of the last century. Today the evolution of technology has forced all libraries to rethink how they function and run their business. The Oregon State Library is no exception. Across the country one thing is clear; libraries remain an important service provided by government. This report outlines options for transforming the Oregon State Library to meet 21st century needs.

At the most core level, the Oregon State Library must continue to support local libraries and Oregonians, reduce overall costs of service, eliminate redundant library services across state agencies, and provide contemporary and necessary services. The case for change at the Oregon State Library develops from multiple sources, both internal and external to state government. The most notable external influence is

the rapidly changing technology for storage, retrieval, and access to information. Ultimately, more efficient use of funding and greater citizen access and availability are key to the future of the Oregon State Library. To remain viable, the Oregon State Library must continually adapt its services and delivery systems.

For example, today other institutions within Oregon, including state agencies, continue to provide library and information services. To the degree that these similar services are redundant or fragmented with Oregon State Library, there exist opportunities for more efficient collaboration and consolidation. The benefits could include improved service levels and a reduction in overall costs of operation.

Over the years, a variety of non-core services have come under the administration of Oregon State Library, for example, poetry collection, book award collection, and genealogy collection. In some cases, the reasons for Oregon State Library sponsorship and administration of these services have diminished and their future placement should be analyzed and reconsidered. Essentially, we believe it is imperative to evaluate decisions made over time in light of our contemporary needs and funding abilities.

Funding for Oregon State Library services comes from multiple sources, including assessments to state agencies, federal funding, state general fund and donations. Funding by assessments does not align with the growing interest in proportionally allocating costs to services rendered. Additionally, these same assessment funds are employed to cover some non-core services that are unrelated to state agencies. Funding alignment with services provides the Oregon State Library with opportunities to drive better service delivery for all stakeholders.

The need for library and information services remains vital to the function of government. This report for the reorganization of the Oregon State Library provides several service delivery alternatives for consideration. We believe the Oregon State Library will be positioned to effectively and efficiently provide those services through a transformation based upon all or some of these service delivery alternatives.

Transformation Considerations

Transformation of the Oregon State Library requires us to be diligent about the planning, communicating, and executing of the changes. At the heart of making a successful transformation are our people who must carry forward the services we provide. In fact, the employees of the Oregon State Library recognize the need for change. They see how the needs of 21st century drive us to reorganize and revamp what and how we do our business.

As leaders, we realize that it all starts with a clear and compelling strategic plan, hence the mandate to lay the groundwork for creating a detailed strategic business plan for reorganization of the Oregon State Library. Upon receipt of the Interim Joint Committee Ways and Means preferred service delivery alternatives for the transformational and enhancement changes, we will build an implementation plan to operationalize the recommendations.

Communication is essential to any successful change at the Oregon State Library. As part of developing this document we have engaged subject matter experts and stakeholders from across the Oregon State Library. This has a two-fold benefit: 1) we have the benefit of their experience and thinking, and 2) they feel part of the future as we define, shape and move forward. Our people are prepared to actively and passionately transform the Oregon State Library.

Summary of State Library Service Delivery Alternatives

Several service delivery alternatives are described in this report. They are organized into ten transformational changes and seven enhancement changes. Our vision behind both categories is as follows:

1. Connect Oregonians to library services by providing leadership, grants and other support to public, school, academic, and tribal libraries
2. Connect print-disabled Oregonians to reading materials and other information to improve their quality of life
3. Connect Oregon state government to quality information to support informed decision-making on behalf of all Oregonians

The service delivery alternatives contained herein are described in terms of their impact to services, specific alternative scenarios, financial considerations, organizational considerations, technology considerations, and anticipated outcomes for each. Examples of outcomes include better alignment of funding and utilization, elimination of duplicative services, increased value and experience for younger Oregonians, and overall increased access and availability. The following table summarizes the service delivery alternatives that are described, in detail, in the following two report sections.

Transformational Changes	Service Delivery Alternatives
<p>1: Library Services to State Government</p> <p style="text-align: center;">Details on Page 10</p>	<p><i>The following Alternatives are not mutually exclusive and may be complimentary.</i></p> <ul style="list-style-type: none"> • Provide at OSL centralized and consolidated acquisition and purchasing of agency library materials (Executive Branch primarily) • Provide centralized access to information across OSL, State Archives, State Law Library, and other agency libraries (e.g., develop a shared web portal) • Develop tailored OSL library information services for state agencies according to their needs • Implement a Fee-for-Service model for library services with tiered service levels to accommodate varying user needs at State Agencies as well as other users (e.g. local governments)
<p>2: Library Services to the Public</p> <p style="text-align: center;">Details on Page 12</p>	<ul style="list-style-type: none"> • Find additional and alternative funding sources for public services (currently funded through state agency assessment) • Clarify and reduce services to the public (primarily the open, public access to materials and facilities)
<p>3: OSL Oregon Heritage Materials Collections</p> <p style="text-align: center;">Details on Page 14</p>	<ul style="list-style-type: none"> • Keep these collections at OSL. Seek direction from Legislature to clarify OSL role in preserving and making accessible Oregon’s heritage collections • Move these collections from OSL. Collaborate with partners to relocate Collections not in alignment with funding sources and mission
<p>4: Non-Government Materials Collections</p> <p style="text-align: center;">Details on Page 15</p>	<p><i>Includes genealogy, poetry, and Oregon Book Awards</i></p> <ul style="list-style-type: none"> • Seek alternative funding to maintain these collections (currently funded through state agency assessment) • Discontinue OSL support for non-government materials

Transformational Changes	Service Delivery Alternatives
5: TBABS Service Model (Talking Books and Braille Services) Details on Page 16	<ul style="list-style-type: none"> • Maintain TBABS and expand the current reach to serve more eligible Oregonians. Implement digital technology options to improve operations • Pursue collaboration on a regional, multi-state system • Transition the TBABS service to another organization or institution
6: Search Engine Administration for State website (ie. Oregon.gov) Details on Page 18	<ul style="list-style-type: none"> • Move the administration and maintenance to DAS • Maintain current operations
7: State of Oregon Documents Details on Page 19	<ul style="list-style-type: none"> • Convene a task force led by a third party to refine the recommendations in the February 2012 Report of the Workgroup on Libraries and Archives in Oregon State Government to consolidate Oregon documents with Archives • Continue to move Oregon Documents program and OSL reference services to Archives as directed in the Governor's Balanced Budget of 2013-2015
8: Oregon Center for the Book Details on Page 21	<ul style="list-style-type: none"> • Move to another cultural organization • Discontinue
9: Cultural Enrichment for State Employees (lectures, exhibits) Details on Page 22	<ul style="list-style-type: none"> • Move or partner with other institutions • Discontinue funding from agency assessments
10: PLINKIT (Websites for Public Libraries) Details on Page 23	<ul style="list-style-type: none"> • Continue as is, for the time being. Phase out slowly • Discontinue with an intentional transition plan for libraries

Enhancement Changes	Service Delivery Alternatives
1: Library Development Consulting with Local Libraries Details on Page 24	<ul style="list-style-type: none"> • Expand consulting services • Maintain current service model with on-going improvements
2: TBABS Fundraising (Talking Books and Braille Services) Details on Page 25	<ul style="list-style-type: none"> • Expand fund development activities • Receive additional support from the general fund
3: Library Youth Services Program Details on Page 26	<ul style="list-style-type: none"> • Formal partnering with Oregon P-20 education community • Expand services with additional staff • Maintain current service level
4: Oregon Library Statistics Details on Page 27	<ul style="list-style-type: none"> • Maintain current service model with on-going improvements • Expand the staff to allow for consulting with local libraries on use of statistics for planning and advocacy
5: Alternative Funding Sources (e.g., Grant Writing and Other Funding) Details on Page 27	<ul style="list-style-type: none"> • Hire or contract with a grant writer/fund developer • Provide staff with training opportunities in grant writing • Partner with other organizations to develop fundable projects
6: Statewide Online Databases for Libraries Details on Page 28	<ul style="list-style-type: none"> • Seek to share database costs with local libraries • Maintain current operations
7: State Library Volunteers and Interns Details on Page 29	<ul style="list-style-type: none"> • Expand • Partner with other agencies • Re-purpose volunteers according to changes in services

The Ten Transformational Changes

Transformational Changes indicate a fundamental shift to current services or programs. These changes may require statute or administrative rule changes, and will serve to transform the business of the State Library. Placement in this section is largely based on the complexity of the transformation, with the first expected to be the most complex.

Transformational Change 1: Library Services to State Government

Description of Current Services

OSL provides services to state agencies including collections, databases, reference, and catalogs. Six librarian positions and ten support staff positions provide a variety of services to state agencies so that Oregonians receive informed services from the State. Library services include access to materials both owned by OSL and borrowed from other libraries, proprietary electronic resources, and reference services related to state agency work.

Need for Change

The Governor's Balanced Budget for the 2013-2015 biennium has tasked OSL to eliminate Government Research Services. Related or redundant services exist across state agencies and other institutions. The State of Oregon lacks a consistent "single source" for finding information across its agencies and institutions. The current approach to funding through agency assessments does not align services to costs.

Service Delivery Alternatives

The following Alternatives are not mutually exclusive and may be complimentary.

- Provide at OSL centralized and consolidated acquisition and purchasing of agency library materials (Executive Branch primarily). Currently, some agencies source their own databases, publications, periodicals, etc. Under this alternative, OSL can source these for the enterprise with increased economies and improved service.
- Provide centralized access to information across OSL, State Archives, State Law Library, and other agency libraries. Centralized access through a shared web portal will improve services and reduce duplication. Increased digitization will enhance availability of materials. These changes will lead to improved service for state government and Oregonians.
- Develop tailored OSL library information services for state agencies according to their needs. Redirect OSL staff research expertise to provide information literacy training and outreach rather than direct research. This approach follows a library best practice and leverages the expertise of the OSL staff.
- Implement a Fee-for-Service model for library services with tiered service levels to accommodate varying user needs at State Agencies as well as other users (e.g. local governments)

Anticipated Outcomes

- Improved awareness and access to information for state agency staff
- Lowered cost to provide services
- More equitable cost allocation across agencies
- Increased alternative funding sources

Considerations

Financial

- It may be possible to shift or consolidate staff space in the building to save money and use the space more efficiently

- There may be a need for additional investment to implement the initial transformation but we believe there would be a savings over time
- Savings could result from elimination of duplication if OSL were the agency that licensed and purchased library materials for the enterprise
- A shift from assessment to use based fees is possible. This could provide better transparency of charges for services
- The GRS Advisory Committee could become a customer utility board to set rates and service levels
- If OSL discontinues some services it may affect another agencies ability to meet requirements for federal funding or accreditation
- There is the potential to pursue LSTA funding for special projects

Organizational

- The enterprise model builds on our established infrastructure and the State of Oregon's approach to entrepreneurial management
- An enterprise-wide library service requires active and open participation from all agencies involved to determine the best solution
- This change implies possible changes to governance
- This supports the goal of building a skilled and educated government workforce and provides state agency staff with access to information on evidence-based practice
- Depending on the scope of the project, OSL can partner to gain additional expertise, support or outsource services
- It would be important to provide marketing and sales training for library staff
- Utilize effective change and transition management activities for staff (ie communications and training)
- Increased collaboration will require planning and training
- Capacity to manage multiple contracts would be needed
- Be prepared to shift or add resources as demand increases
- Shifting or consolidating physical space could foster communication both internally and externally

Technological

- Research would need to be done on other state libraries who operate as an enterprise, specifically the technology used

Transformational Change 2: Library Services to the Public

Description of Current Services

OSL provides Oregonians with access to collections at OSL via online access, physical access, lending books and materials, reading room and public presentations. OSL provides workspace, online resources, computers, study area, wireless, equipment (copiers, etc.), meeting rooms, staffed service areas. Limited public reference services are provided in concert with collections, including Oregon history and culture, genealogy, state agencies, and government documents.

Need for Change

Related or duplicative services exist at other institutions (especially physical space and reference). Current funding (assessment) is designated for services to state agencies. There is unclear alignment between services provided and funding sources.

Service Delivery Alternatives

- Find additional and alternative funding sources for public services. To retain a level of public access, OSL can consider the following actions: Increase the use of volunteers similar to the Capitol Visitor Center, recruit additional partners (e.g. other heritage organizations), and require cost sharing from existing and potential partners. To secure funding, the creation of a foundation for the State Library should be considered.
- Clarify and reduce services to the public. Limiting access to reference desk, reading room, and collections will focus OSL resources on supporting state government while preserving a more controlled availability of services to the public. These benefits can be realized by redefining relationships with the Willamette Valley Genealogical Association and the Oregon State Poetry Association. Additionally, to transition the public to suitable service delivery alternatives, OSL can build partnerships with other organizations.

Anticipated Outcomes

- Better alignment of funding and utilization
- Eliminate duplication of services provided by other libraries and institutions

Considerations

Financial

- It will be important to explore funding other than assessments for collections and public reference that are not related to the work of state agencies
- Some services to the public could be charged on a cost recovery basis
- If collections are moved out of OSL there could be savings from reduced rent
- Repurposing the book stacks could be difficult and expensive
- Changes to public service could reduce technological and staff costs

Organizational

- A shift in services to the public could help staff focus on internal relationships
- It will be important to consider and monitor our relationships with WVGS and the Oregon State Poetry with whom we have MOUs
- We could expand online offerings while decreasing physical offerings
- It will be important to utilize effective change and transition management activities for staff (e.g., communications and training)

- It will be important to assess the impact of limiting the reference room and public computers on our public image
- Monitor issues related to using volunteers and union implications

Technological

- The computers currently for use by the public could be repurposed
- Public wireless access could be limited to conference and meeting rooms

Transformational Change 3: Oregon Heritage Materials Collections

Description of Current Services

OSL manages several unique collections (publications, photographs, indices) of materials related to Oregon history, art, and culture. Other institutions including State Archives, Oregon Historical Society, and universities hold collections with some similarities. OSL staffing includes approximately one FTE to manage and maintain these collections.

Need for Change

Oregon Heritage Collections are scattered throughout the state. Collections are sometimes not effectively maintained and there is likely duplication. No overall state policy exists regarding collection of Oregon heritage in the areas of utilization, development, preservation, funding, display, and cataloging.

Service Delivery Alternatives

- Keep these collections at OSL. Seek direction from Legislature to clarify OSL role in preserving and making accessible Oregon's heritage collections. OSL expertise can be leveraged through partnerships with heritage community to identify what exists by organization, determine appropriate ownership, and consolidate Collections where appropriate.
- Move these collections from OSL. Collaborate with partners to relocate Collections not in alignment with funding sources and mission.

Anticipated Outcomes

- Preserve rich heritage
- Increased access and availability
- Increase cooperation among heritage organizations

Considerations

Financial

- It will be important to have an understanding of the actual cost of these collections to OSL
- The Envisioning Oregon report could identify opportunities for savings of time and money
- The work of developing preservation and accessibility standards would require funding

Organizational

- We need to explore partnerships to make sure we do not lose important historic collections

Technological

- Collaboration and partnerships with other organizations will facilitate centralized digitization efforts
- The current historic photograph website could be discontinued but the content would need to be transferred to another organization
- Photograph files might not contain any descriptive metadata and copyright issues might have to be addressed

Transformational Change 4: Non-Government Materials Collections

Description of Current Services

OSL manages genealogy materials, poetry collection, and Oregon Book Awards collection. There are on-going MOUs with Willamette Valley Genealogical Society and Oregon State Poetry Association. These collections are complementary to the heritage collections. Management of these collections requires a small amount of OSL staff time for processing and maintaining.

Need for Change

Current funding (assessment) is designated for services to state agencies. There is unclear alignment between services provided and funding sources.

Service Delivery Alternatives

- Seek alternative funding. To maintain the current availability and access to non-government materials, OSL could work with current partners to explore funding service delivery alternatives such as cost sharing.
- Discontinue OSL support for non-government materials. To enhance the alignment of OSL services and funding, OSL could work with current partners to explore alternative locations for these materials.

Anticipated Outcomes

- Better alignment of funding and utilization
- Preserve culturally significant collections

Considerations

Financial

- Stronger partnerships could save staff time and funding
- Grant funding should be explored for maintaining these collections
- While the genealogy collection may not be seen as useful to state agencies it has been used by the reference librarians to respond to agency staff and legislators' questions
- Is cost recovery or general fund more appropriate for functions that will serve the public
- It will be necessary to assess how these changes may impact existing agreement with Ancestry.com

Organizational

- There is substantial public support and advocacy for genealogy and poetry
- The impact on staffing the reference room and technical services will need to be assessed
- The Oregon Poet Laureate's reading room which houses the poetry collection could be decommissioned and the space repurposed
- There are potential changes to the administrative rules

Technological

- Other than the Ancestry.com data files, there are no real technology concerns. Our association with Ancestry.com is through the WVGS so the disposition of those files will need to be discussed

Transformational Change 5: TBABS Service Model (Talking Books and Braille Services)

Description of Current Services

OSL provides access to library materials for Oregonians with print, physical, and reading disabilities. Approximately 5,000 out of 50,000 eligible Oregonians are being served. The books, equipment and mailing costs are supplied under a signed agreement with the National Library Services for the Blind and Physically Handicapped. Staff costs and supplies are funded with the State general fund and donations. No other library in the state provides these services, and in most states, the state library provides this service. Braille services are currently outsourced. Public libraries likely would not have the capacity to provide these services even if funded by the state.

Need for Change

The Governor's Balanced Budget, for the 2013-2015 biennium, has tasked OSL to reduce the costs for the TBABS and other Library services by implementing improvements that were identified in the February 2012 Report of the Workgroup on Libraries and Archives in Oregon State Government. Advances in technology and generational shifts are driving the need to serve customers differently.

Service Delivery Alternatives

- Maintain TBABS and expand the current reach to serve more eligible Oregonians and implement digital technology options to improve operations. There exists a constant, on-going need to support blind and print disabled Oregonians, and OSL can increase awareness for TBABS through outreach and promotion. This can be accomplished through new and existing partnerships with the educational community and state and local organizations. Separately, there exist new technologies that can increase efficiency and provide better patron service including Radio Frequency Identification (RFID) for inventory management. Additionally, OSL could pursue grant funding to explore emerging technologies.
- Pursue collaboration on a regional, multi-state system. OSL maintains active discussions with talking book libraries across the country to explore opportunities for collaboration and consolidation. For example, Utah State Library currently provides access to braille materials for patrons in a number of states, including Oregon. OSL also is participating in discussions about a nationwide shared software solution for circulation and patron management.
- Transition the TBABS service to another organization or institution. OSL is the only resource in Oregon currently providing these services. A transition would require an updated agreement with the National Library Service for the Blind and Physically Handicapped. The Commission for the Blind has been mentioned as an alternate location; however, the Commission does not have adequate resources. Additionally, its focus is exclusively on the blind, and TBABS serves patrons with learning and physical disabilities as well.

Anticipated Outcomes

- Increased utilization of services
- Increased value and experience for younger Oregonians
- Decrease cost to provide services
- Demonstrate innovation and increase national recognition

Considerations

Financial

- There is a potential for requesting LSTA funding for special projects
- There is a potential for recruiting and using more volunteers
- Any funding cuts to this program directly affect our ability to meet Federal LSTA Match and MOE
- The current state funding is not adequate for the staffing required and donations are being spent at an unsustainable rate
- We could explore additional funding from ODE for providing services to students with disabilities

Organizational

- It will be important to assess the impact of this change on the culture of OSL
- We could develop innovative partnerships with Oregon Commission for the Blind, DHS Vocational Rehabilitation, and optometry associations

Technological Considerations

- The Utah State Library has implemented RFID (Radio Frequency Identification) for their talking books program and it may be a model for OSL

Transformational Change 6: Search Engine Administration for State of Oregon website (ie. Oregon.gov)

Description of Current Services

OSL provides administration and maintenance for the information architecture of the Oregon.gov search engine. OSL reports statistics for its use and makes periodic adjustments to searching protocol. It is now hosted on Google and paid for by DAS on behalf of the enterprise. Oregon.gov is directed by the E-Governance Board.

Need for Change

The original search engine was created some time ago with different technologies that required professional librarian support. With the move to the Google search engine, the requirements for support by OSL have changed and can be accomplished via partnerships and OSL membership on the E-Governance Board. While this is currently a very small part of OSL operations, it is important to clarify responsibility.

Service Delivery Alternatives

- Move the administration and maintenance to DAS. Coordination of the support under a single organization (not OSL) may be more effective and provide a logical succession plan for future support
- Maintain current operations

Anticipated Outcomes

- Increased alignment of resources to core services

Considerations

Financial

- There may be a small amount of staff time saved with a move to DAS
- There has been an advantage gained by using professional library expertise for the creation of the taxonomy and metadata structure

Organizational

- It would be good to work with the E-Government Board to define responsibilities

Technological

- The Utah State Library employs NIC and uses Google Custom Search and consulting with them would be recommended
- We could explore moving maintenance to other technology service providers such as ETS or NIC

Transformational Change 7: State of Oregon Documents

Description of Current Services

OSL provides depository and repository services for Oregon documents that are published by state agencies (or under direction of) and are intended for public distribution. These include documents from territorial times. Citizen access to these documents is available via the physical collection at OSL, by the Internet, and through the ten local libraries that serve as depositories.

Need for Change

The State lacks an integrated policy for all the agencies needing to create, store, and retrieve documents and records. The Governor's Balanced Budget for the 2013-2015 biennium has tasked OSL to consolidate the State Library's document repository and reference services with the State Archives.

Service Delivery Alternatives

- Convene a task force, led by a third party, to refine the recommendations of the February 2012 Report of the Workgroup on Libraries and Archives in Oregon State Government. Initial efforts to implement the recommendations surfaced significant issues relating to consolidating Oregon documents with Archives. The task force would include the State Library, State Archives, and State Law Library, and would create an action plan that clarifies definitions and relationships leading to an effective, efficient process for making Oregon documents and other state information accessible
- Continue to move Oregon Documents program and OSL reference services to State Archives as directed in the Governor's Balanced Budget of 2013-2015. Testing has begun with the State Library and the State Archives to move the Documents program to the Archives Record Management System

Anticipated Outcomes

- Clear understanding of the roles and responsibilities of libraries and archives in state government
- Informed and effective retention practices
- More effective use of resources

Considerations

Financial

- There is a possibility of providing this service on a cost recovery basis
- Since these are documents created by state agencies for Oregonians it is appropriate that assessment funding is used
- Statutory changes may be required as the Oregon Documents program is in statute
- This has potential for partnerships with cultural and historic groups
- A possible funding source for an inter-agency catalog could be an LSTA grant
- A shared funding model could be used between partners once roles and responsibilities are defined

Organizational

- There have been previous attempts to reconcile redundancies that have not yielded an agreed upon solution

- Retention requirements of OSL and State Archives are different
- The ability of OSL staff to respond to requests effectively with a different model needs to be explored
- Additional staff time would need to be dedicated to digitization and maintaining a joint system
- There is a preference among some that the custodians of Oregon documents, records and publications be dispersed to ensure open access

Technological

- Using the State Archives records management system for Oregon documents has not been fully tested
- Once testing is finished the actual transitioning of systems could require additional resources

Transformational Change 8: Oregon Center for the Book

Description of Current Services

This is a program affiliated with Library of Congress to promote books and reading. OSL coordinates programs at the state level to reach local libraries and communities. Programs include literacy development, literary exhibits, joint programs with local libraries, and national programs brought to Oregon. OSL staffing is about 0.10 FTE.

Need for Change

Oregon Center for the Book is not a core service of the library. The number of Oregonians served is low.

Service Delivery Alternatives

- Move to another cultural organization. In some other states the Center for the Book is located in the Humanities Council, university or a private nonprofit. The majority of states locate it at the State Library
- Discontinue. Would require working with the Center for the Book in the Library of Congress to disaffiliate the state of Oregon

Anticipated Outcomes

- Federal funds effectively used; redirected to greater needs and impact
- More effective use of staff and resources

Considerations

Financial

- The LSTA funding currently used for this program could be used for other purposes
- Staff currently assigned to the Center for the Book could be reassigned to other areas of Library Development
- Projects specific to Oregon, such as the Oregon Intellectual Freedom Clearinghouse and Oregon Authors Website, would be continued with current staff

Organizational

- It will be important to consider how this would affect the national recognition and reputation of OSL

Technological

- None identified at this time

Transformational Change 9: Cultural Enrichment for state employees

Description of Current Services

OSL offers a fall and spring lunch time lecture series (4-5 each) of interest to Oregonians and state employees. Additionally, OSL staff create approximately one exhibit each year that showcases the collections of the State Library. The lecture series and the exhibits are promoted to both state employees and the public. OSL staff time for these programs is minimal.

Need for Change

Currently cultural enrichment is funded by assessment, which could be used to provide more comprehensive work resources. Utilization and ROI are low. This is not an essential state service.

Service Delivery Alternatives

- Move or partner with other institutions
- Discontinue funding from agency assessments

Anticipated Outcomes

- Redirection of assessment funds to core services
- More effective use of staff

Considerations

Financial

- The cost to OSL for lectures is staff time to organize, the lecturers have been volunteer to this point
- Exhibits also use OSL staff time and some minor exhibit production costs
- We need an understanding of the actual cost and any return on investment
- It does not seem appropriate to use assessment funding on this project since it is not directly work related and is open to the public
- This could be fee based

Organizational

- This project was designed as an outreach and marketing activity to enhance library awareness and provide Oregon themed enrichment activities for state employees, it would be important to find alternate outreach and marketing efforts

Technological

- We could create a virtual lecture series to reach a wider audience of state agency staff. However, preservation issues and lecturer copyright might be a concern

Transformational Change 10: PLINKIT (Websites for public libraries)

Description of Current Services

OSL provides website development and hosting for small, public libraries. This project, which began in 2005, was intended to allow small, public libraries the opportunity to have a presence on the web at no cost. Currently, approximately 50 public libraries have these websites, and that number is declining.

Need for Change

Website development technology has become easier to use and inexpensive. When established in 2005, libraries lacked resources and capabilities to develop websites. Now technology has improved, cost has dropped, and local ability has increased.

Service Delivery Alternatives

- Continue as is, for the time being, and phase out slowly. The evolution of technology will create a natural change. OSL does not anticipate making additional investments in upgrades and new technology
- Discontinue rapidly. Create an intentional plan to transition libraries to other web sites

Anticipated Outcomes

- Redirect resources to help with next generation of library services

Considerations

Financial

- We would no longer need to pay for membership in the PLINKIT Collaborative
- LSTA funding and staff currently being used for PLINKIT can be used for other purposes
- If this, or in combination with other changes, free up enough time FTE may be reduced or reassigned
- There may be training and other considerations in the transition that could require funding

Organizational

- The current PLINKIT Libraries would need to be phased out over time
- We should assess whether the LD position could be re-assigned to another LSTA funded project
- PLINKIT is a point of pride for OSL and raises visibility; whatever that replaces it needs to be as effective

Technological

- This would allow us to repurpose the PLINKIT development server

The Seven Enhancement Changes

Enhancement changes indicate that the program or service being discussed is stable and has been subject to ongoing evaluation and improvement as necessary. The changes indicated for these services are enhancements rather than transformational. Their placement in this section has no bearing on the importance to the agency or to Oregonians.

Enhancement 1: Library Development Consulting with Local Libraries

Description of Current Services

Assisting local libraries - public, academic, school, and tribal - to improve library services for all Oregonians. This primarily federally funded program is staffed by 5 professional librarians who act as consultants to all types of local libraries. Their areas of expertise include technology development, youth services, electronic services, school libraries, statistical analysis, and administration of Federal Library Services and Technology Act (LSTA) funds.

Need for Change

OSL continually reviews the needs of libraries around the state and adjusts the services OSL offers as necessary.

Service Delivery Alternatives

- Expand consulting services. Focus on high demand areas, such as academic libraries and youth services and intentional partnering with education community, e.g. Oregon Education Investment Board
- Maintain current service model with continuous, on-going improvements

Anticipated Outcomes

- Library services throughout Oregon adopt standards and best practices to improve services to their communities
- OSL directs additional support to libraries experiencing challenges so that all Oregonians have equitable access to library services

Considerations

Financial

- If partnering will reduce the need for consultants there may be some savings
- Expansion will likely cost more in travel and potentially in staffing
- We may ask for more cost sharing with public, academic, school and tribal libraries for some of these functions
- There could be opportunities for savings by coordinating staff efforts in outreach travel
- Partnering and other changes could free staff time to better focus on consulting

Organizational

- This could provide an opportunity for OSL staff with other areas of expertise to consult
- We would need a process to identify required consultant skills, then train and develop consultants
- There could be a shift in agency culture to assure success in increased partnerships

Technological

- Taking advantage of the opportunities for more online presence would require technology and training for Library Development staff

Enhancement 2: TBABS Fundraising (Talking Books and Braille Services)

Description of Current Services

Raising funds from existing donors currently provides for enhanced services, and some core services, otherwise unfunded by state general fund. Current staff support is 0.25 FTE, and over the past five years, annual contributions have averaged \$81,000 annually (exclusive of large bequests).

Need for Change

General fund dollars have been cut back over several biennia, creating a shortfall for funding operations. Current rate of depleting donated funds is unsustainable.

Service Delivery Alternatives

- Expand fund development activities and reach out to corporations and foundations
- Receive additional support from the general fund

Anticipated Outcomes

- Augment the diversity of funding for TBABS services
- Increase library services and programs for blind patrons
- Develop pilot projects with new technologies
- Expand outreach

Considerations

Financial

- Fund raising may require an increase in staff time or could involve the use of a volunteer or a friends of the library group
- Over time the intent of this program is to be able to fund more of the program
- Foundations generally don't support operational cost but rather enhancement costs
- Initially this expansion may cost us more money for training, travel, consulting, etc.

Organizational

- Expanding fundraising efforts would require staff training for marketing and outreach, implying identifying appropriate staff and skill development requirements
- Grant writing skills, mentioned earlier, also support this area of transformation
- These efforts could require repurposing or addition of staff
- Specialized skills and knowledge are needed to be an effective fund developer

Technological

- There is a current donor data base that supports this program that may require some changes
- There may be need to parse, analyze, and compile data or provide support for sites that reach out to potential donors/funding entities and give them a way to donate

Enhancement 3: Library Youth Services Program

Description of Current Services

One FTE youth services librarian consults with public libraries to assist in the improvement of services to children. Partnership at the state level provides programmatic opportunities at the local level. The librarian administers the Ready to Read Grant program funds that are awarded to every public library and used for early learning and summer reading program. Additionally, the librarian communicates and works with colleagues at other state libraries to disseminate information and best practices, and represents Oregon in the national Collaborative Summer Library Program. Every two years, a basic youth services library course is offered to non-degreed staff of small, rural libraries.

Need for Change

There is a need for continuous improvement of library youth services, based on Governor's education initiatives

Service Delivery Alternatives

- Formal partnering with Oregon P-20 education community. The Ready to Read grant program is part of the Governor's Early Learning and Education Strategic Initiatives. The State Library staff currently participates on a number of related committees.
- Expand services with additional staff. Additional youth services consulting would facilitate better local alignment between libraries and the education community.
- Maintain current service level

Anticipated Outcomes

- All children enter school ready to read
- All third graders read at grade level
- Increase high school graduation rate

Considerations

Financial

- Expansion may add costs, however, it may help make public and tribal libraries more efficient
- Partner spending related to this may be able to be used for federal match. (Education reading programs)
- Potential to do biennial grants instead of annual grants and/or explore other grant schedules

Organizational

- Expansion or partnering could require additional staffing
- This program is highly regarded by local libraries, policy makers, and state level partners

Technological

- If there is a technical component, development of online services can be hosted by OSL. If OSL staff provide technical consultation, considerable staff resources may be needed

Enhancement 4: Oregon Library Statistics

Description of Current Services

OSL gathers and publishes statistical data from public & school libraries which are then analyzed and used for planning and advocacy. Public libraries are statutorily required to submit data to OSL annually. After extensive vetting that data is reported at the national level. All states participate in this federally funded program administered by the Institute of Museum and Library Services. Staffing consists of 0.75 FTE.

Need for Change

This is an on-going core service of OSL with no significant imperative for change.

Service Delivery Alternatives

- Maintain current service model and apply continuous improvement
- Expand the staff to allow for consulting with local libraries on use of statistics for planning and advocacy. The staff would be federally funded and would require a program change

Anticipated Outcomes

- Local libraries have the statistics required to evaluate and modify their services
- Enables Oregon to be included in nationally published comparisons
- Provides OSL with information for targeting its support to libraries
- Furnishes local libraries with important statistical information for grant applications and budget requests

Considerations

Financial

- If kept as-is there are not likely any financial considerations
- If this function goes away, savings will primarily come through saving staff time that is federally funded
- There could be an opportunity for investment/partnership to make improvements and make this process more efficient

Organizational

- OSL staff work with local public and school libraries to effectively use the information gathered for planning and advocacy

Technological

- Self-service tools could be provided through the OSL/LD website

Enhancement 5: Alternative Funding Sources (e.g., Grant Writing and Other Funding)

Description of Current Services

One of the recommendations of the February 2012 Report of the Workgroup on Libraries and Archives in Oregon State Government was that OSL pursue federal and other grants as additional sources of funding, especially for special projects. Potentially there is funding available from a variety of organizations, and this could be an effective area for OSL to put effort into.

Need for Change

This enhancement is in response to a recommendation in the report of February 2012 Report of the Workgroup on Libraries and Archives in Oregon State Government . This would be a new service.

Service Delivery Alternatives

- Hire or contract with a grant writer/fund developer. OSLS does not have the current capability (only 0.25 FTE dedicated to fund development)
- Provide current staff with training opportunities in grant writing. This would require reallocation of or addition to current staff
- Partner with other organizations to develop fundable project. This would be an expansion of current partnership efforts

Anticipated Outcomes

- Greater diversity of funding sources
- Bring additional federal funding
- Target growth of selected services

Considerations

Financial

- May be able to partner with another agency that has a grant writer
- Interns and/or skilled volunteers could help us with this
- There may be additional requirements or costs to the agency beyond those of applying for grants
- Through other enhancement changes proposed we could increase capacity for this at the State Library
- Other funding could be freed up if we receive grant funding
- If we brought in a new position it would need to be sustained through the grants

Organizational

- Partnering would gain valuable resources through networking
- Expanding might require additional staff or reallocation of staff
- Because successful grant writing requires skilled staff this could be a good opportunity for current staff to gain skills and take on new roles

Technological

- None at this time

Enhancement 6: Statewide Online Databases for Libraries

Description of Current Services

The State Library, using federal funds, procures and contracts for reference and research online journals and books (databases) that are made available to all Oregonians in local libraries, via local library websites. Additionally, the Libraries of Oregon website allows access to these and other resources for Oregonians who do not have local tax supported library service.

Need for Change

Ever increasing demand for wider variety of online resources is the primary driver of this enhancement.

Service Delivery Alternatives

- Seek to share database costs with local libraries. Asking libraries to pay part of the cost of these services would allow OSL more flexibility in allocating reduced federal funds and an ability to provide a wider variety of resources
- Maintain current operations

Anticipated Outcomes

- Improved access to electronic resources, including Work Source Oregon (job search, training)
- More equitable access to these resources

Considerations

Financial

- Maybe general funds could pick up some of the costs, which occurs in other states
- There would be cost savings through database cost sharing with local libraries
- Federal funds purchase online databases available through academic, school, tribal and public libraries as well as the State Library online portal
- Everything on the Internet is not free or peer reviewed, federal funds pay for resources that local communities would need to pay

Organizational

- N/A

Technological

- Librariesoforegon.org is supported by the electronic services consultant and OSU staff
- If we help provide authentication or provide support to local libraries, there could be some support load
- Having the same product available to all makes student transitions (from grade school to high school to college to life) smoother

Enhancement 7: State Library Volunteers & Interns

Description of Current Services

The OSL program of volunteers assists staff in completing tasks and projects that enhance the mission of the agency. The 0.75 FTE program coordinator identifies tasks by working with staff and management and then recruits, orients, and trains volunteers. The coordinator is also involved with external volunteer organizations to bring to OSL best practices and continuous improvement. In 2013, from January to July, volunteers have provided 3638 hours to OSL, an equivalent of three FTEs.

Need for Change

The demographics of available volunteers are changing. Evolving approaches to service at the state library (evolving services, patron support, and technologies changing the nature of available work) create a need for enhancements.

Service Delivery Alternatives

- Expand. An expanded program could utilize volunteers and interns to support the changing nature of library services and provide opportunities for the growing baby-boomer retirement group
- Partner with other agencies. Sharing coordination of volunteers (assignments, training, rotation) among state agencies could bring multiple benefits
- Re-purpose volunteers according to changes in library services. The transformation of the state library will affect current tasks

Anticipated Outcomes

- Augment service capability at OSL
- Free staff for higher level work

Considerations

Financial

- There is a potential increase in certain costs related to use of interns and staff oversight, but the long view is that the use of interns and volunteers can free up staff to work on more critical work
- There is an upfront cost in staff time to the use of volunteers to create projects and determine needs
- There may be some added efficiency through partnering with other agencies

Organizational

- A successful volunteer program requires staff oversight and participation
- Expanding would require staff training for working with volunteers and interns
- Partnering would develop good relations with other agencies and provide opportunities for collaboration
- Even though work with volunteers can be time-consuming, it provides value to volunteers, library staff, and our community

Technological

- Making sure that the volunteers and interns (two different things) have the equipment, space, and software they need to do any required onsite work
- Volunteers may stay only a short time and they sometimes have limited technical skills. As a result, their need for tech support is often higher than other staff
- Some potential intern or volunteer tasks could focus on technology, e.g. creating a web exhibit of some portion of the collection or creating an online tour of the building

Summary and Conclusion

In May 2013 the Oregon State Library and the Department of Administrative Services were directed to submit to the Legislature in February of 2014 a detailed strategic business plan for the reorganization of the Oregon State Library. This report lays the framework for a future strategic business plan through the identification and analysis of transformational service delivery alternatives organized into ten transformational changes and seven enhancement changes.

The following four guiding principles helped the Oregon State Library identify and define service delivery alternatives for consideration:

1. We need to evaluate our business model and make sure we are meeting the needs of our customers
2. We need to ensure that we are delivering the highest value services with the limited resources available
3. We need to ensure that funding streams are appropriate for services being funded and services add value for agencies being assessed
4. We need to stop talking about making changes called for in previous efforts and start actually implementing the changes necessary for transformation

The driving vision for the Oregon State Library transformation service delivery alternatives is as follows:

1. Connect Oregonians to library services by providing leadership, grants and other support to public, school, academic, and tribal libraries
2. Connect print-disabled Oregonians to reading materials and other information to improve their quality of life
3. Connect Oregon state government to quality information to support informed decision-making on behalf of all Oregonians

The transformation service delivery alternatives contained herein have been described in terms of their impact to services, specific alternative scenarios, financial considerations, organizational considerations, technology considerations, and anticipated outcomes for each. Examples of outcomes included better alignment of funding and utilization, elimination of duplicative services, increased value and experience for younger Oregonians, and overall increased access and availability.

The need for library and information services remains vital to the function of government. This report for the reorganization of the Oregon State Library provides several service delivery alternatives for consideration. The Oregon State Library will be positioned to effectively and efficiently provide those services through a transformation based upon all or some of these service delivery alternatives.

Appendix 1: As-Is Map for Current OSL Services

In conducting their analyses, the Project Team and Work Groups reviewed each of the over 90 discreet services currently offered by the Oregon State Library. Collectively, they represent the AS-IS state of library services.

For the purpose of analyzing service delivery alternatives, the Project Team aligned the services into 17 groups. The ten whose future state service delivery alternatives were substantial were called Transformational Changes. The seven whose future state service delivery alternatives are characterized as incremental were called Enhancement Changes.

In the chart below, each of Transformational Changes and Enhancement Changes are paired with its current services.

Oregon State Library Transformational/Enhancement Changes and Current Services

Transformational Changes	Current Services
1. Services to State Government	<p><u>Services to Libraries and Oregonians</u></p> <ul style="list-style-type: none"> • Federal documents collection • Federal documents program <p><u>Services to State Government</u></p> <ul style="list-style-type: none"> • Quick (concise) information (like Google) • In-depth searching and finding so that agency staff can analyze and make decisions • Online databases and news service alerts • Online full text articles • Listservs/mailling lists, electronic distribution lists • Digitization • State Government reference room usage • State employee access to computers and computer use • Wireless and telework facility (for state employees at State Library) • Test proctoring for state employees • Bibliographies of topical information • Consulting on information and materials organization and sharing library science expertise • Staff Legislative library; answer telephone and assist in person • Locating materials to respond to an information request • Training so that agency staff can effectively use state and other information resources • Digitization to provide access • Manage and maintain collections • Provide resource materials to state agency staff via document delivery, web portal SEIC and collections housed at OSL • E-clips <p><u>Collections</u></p>

Transformational Changes	Current Services
	<ul style="list-style-type: none"> • Online state employee databases • State agencies high performance materials • Oregon vertical file • Main collection • Internal auditors
2. Services to the Public	<p><u>Services to Libraries and Oregonians</u></p> <ul style="list-style-type: none"> • Connecting citizens to government documents • Reference room and public services for government info • Staff reference desk; answer questions and assist in person • Workspace with chairs and tables (reference room space and furniture) • Space (GRS): public access computers, chairs, tables, equipment, etc. • Help public (citizens) with reference room equipment, scanners, microfilm, copiers • Microfilm/microfiche machines/scanners • Public reference <p><u>Services to State Government</u></p> <ul style="list-style-type: none"> • Meeting rooms • Register patrons, check out materials, check in materials upon return • Wireless and telework facility (for state employees at state library) • Referrals to appropriate state agencies – info gateway • Availability of local newspapers in reference room area
3. Oregon Heritage Collections	<p><u>Services to Libraries and Oregonians</u></p> <ul style="list-style-type: none"> • Access to collections and reference services in house <p><u>Collections</u></p> <ul style="list-style-type: none"> • Special collections • Oregon Index online • Oregon Index cards • Photographs • Oregoniana, Oregon History and Culture • Oregon California Trails Association Collection
4. Non-Government Collections	<p><u>Services to Libraries and Oregonians</u></p> <ul style="list-style-type: none"> • Genealogy <p><u>Collections</u></p> <ul style="list-style-type: none"> • Oregon Book awards • Genealogy • Oregon Poetry
5. TBABS Service Model	<p><u>Services to Libraries and Oregonians</u></p> <ul style="list-style-type: none"> • Daily quality inspection of books and equipment • Retrieving (books and equipment) • Daily bulk shipments of books • Customer care and retention

Transformational Changes	Current Services
	<ul style="list-style-type: none"> • Suggesting and entering books and updating patron records • Customer awareness, newsletter • Managing patron requests • TBABS programs • Repair • Newspaper by phone or online (NFB-Newsline) • Registration for eligible patrons • Training of patrons (BARD) • Promotion and coordination with national organization and others • TBABS eligible children • Overdues • Interlibrary loan • Soliciting new customers <p><u>Collections</u></p> <ul style="list-style-type: none"> • TBABS Collections
6. Oregon.gov Search Engine Administration	<p><u>Services to State Government</u></p> <ul style="list-style-type: none"> • Serve on e-government board for Oregon.gov search engine • Some administration of Oregon.gov search engine
7. Oregon Documents	<p><u>Services to Libraries and Oregonians</u></p> <ul style="list-style-type: none"> • Oregon documents for public <p><u>Services to State Government</u></p> <ul style="list-style-type: none"> • Oregon documents • <i>Reports to the Oregon State Legislature</i> blog • <i>Read All About It Oregon</i> blog <p><u>Collections</u></p> <ul style="list-style-type: none"> • ORdocs depository • ORdocs repository
8. Center for the Book	<p><u>Services to Libraries and Oregonians</u></p> <ul style="list-style-type: none"> • Coordinate Oregon's involvement in Letters about Literature contest for children and teens which promotes common core standards
9. Enrichment for state employees	<p><u>Services to State Government</u></p> <ul style="list-style-type: none"> • Exhibits • Lecture series
10. Plinkit	<p><u>Services to Libraries and Oregonians</u></p> <ul style="list-style-type: none"> • Collaborate with 5 other states to plan and execute improvements to Plinkit that benefit all six states. • Provide pre-built websites (Plinkit) to small libraries (public, rural) that are easy to edit and maintain (including hosting, training, support)

Enhancement Changes	Current Services
1. Library Development Consulting	<u>Services to Libraries and Oregonians</u> <ul style="list-style-type: none"> • Staff working with public libraries to improve services based on best practices • Staff consults with all libraries to improve their services based on librarianship knowledge and support programs • Disseminate information about continuing education (CE) opportunities to libraries and librarians • Intellectual Freedom Clearing House <u>Collections</u> <ul style="list-style-type: none"> • Library Science
2. TBABS Fundraising	<u>Services to Libraries and Oregonians</u> <ul style="list-style-type: none"> • Two annual solicitations and fundraiser • Large print calendar • Planned giving program
3. Youth Services	<u>Services to Libraries and Oregonians</u> <ul style="list-style-type: none"> • Provides summer reading program materials to local libraries • Provide intensive multi-day training for non-degreed staff at local libraries working with children & teens • Active participant in Governor's P-20 education initiative • Administer state general fund grants to local libraries for early literacy and summer reading activities
4. Statistics	<u>Services to Libraries and Oregonians</u> <ul style="list-style-type: none"> • Gather and publish public library statistics to assist local libraries in decision-making and budgeting • Quality Education Model report on school libraries provides info about state of school libraries in Oregon
5. Grant Writing (applications) & Other Funding Options	<ul style="list-style-type: none"> • A new recommendation; no current capability exists
6. Online Databases	<u>Services to Libraries and Oregonians</u> <ul style="list-style-type: none"> • Website that provides access to online databases to Oregonians who do not have local library services (Libraries of Oregon) • License and purchase online info databases for all Oregonians via their local libraries and libraries of Oregon website • OSLIS website providing access to databases and information literacy activities for all K-12 in Oregon
7. Volunteers & Interns	<u>Services to Libraries and Oregonians</u> <ul style="list-style-type: none"> • Volunteer program • Use interns

Appendix 2: Project Participants and Stakeholders

Stakeholder Group	Members
State Librarian	MaryKay Dahlgreen
Project Sponsor, COO's office	Sarah Miller, Deputy COO
Project Advisory Committee	Aletha Bonebrake, State Library Board Chair
	Mary Beth Herkert, State Archivist
	Cathryn Bowie, State Law Librarian
	Michele Burke, Oregon Library Association President
	Faye Chadwell, University Librarian OSU
	Richard Turner, TBABS Advisory Council
	Kris Kautz, Deputy Director of Revenue
	Sara Lochner from Senator Courtney's office
	Dorothy Waller, from Speaker Kotek's office
	Jerry Curry, SEIU representative
Project Team	MaryKay Dahlgreen, State Librarian
	Sam Hall, State Library Board
	Susan Westin, Manager LD and TBABS
	Margie Harrison, Manager GRS
	Shawn Range, Business Manager
	Eugene Newbill, OSL staff
	Alice LaViolette, OSL staff
	Elke Bruton, OSL staff
	Jennifer Maurer, OSL staff
	Luis Navarrete, OSL staff
	Jessica Rondema, Executive admin.
Project Work Groups:	
Services to Libraries & Oregonians	Abigail Elder, Director, Beaverton Public Library
	Allen McKiel, Director, Western Oregon University Library
	Christi Joachim, Patron, Talking Books and Braille Services
	Ebonee Bell, Board Member, OSL and Librarian, Multnomah County Library
	John Russell, Librarian, University of Oregon
	Perry Stokes, Director, Baker County Library
	Ruth Murray, Coordinator, PSU Library Media Program & former President, Oregon Association of School Libraries
	Stephanie Lind, Program Supervisor for Outreach and Youth Services, Washington Co. Cooperative Library Services
	Jennifer Maurer, LD (convener)
	Joel Henderson, TBABS
	Katie Anderson, LD
	Robby Pietz, GRS
	Robin Speer, Library Administrative Services, TBABS
Services to State Government	Margie Harrison, OSL Staff (GRS Program Manager) (co-convener)
	Susan Westin, OSL Staff (LD/TBABS Program Manager) (co-convener)
	Kate McGann, OSL Staff (Collection Management Librarian)
	Jerry Curry, OSL Staff (Information Specialist)
	Sara Belousek, OSL Staff (Document Delivery coordinator)
	Ann Reed, OSL Staff (Federal Program Coordinator)
	Ray Miao, OSL Board of Trustees
	Juli Shepard, Librarian, Oregon State Hospital Library

Stakeholder Group	Members
	Claudia Weston, Government Information Librarian, PSU Layne Sawyer, Reference Coordinator, Oregon State Archives Greg Sanker, IT Service Manager, Dept. of Revenue Jan Norland, Legislative Committee Services Amy Zlot, Multnomah County Health Department Mary Beth Herkert, State Archivist
Collections	Eleanor Berry, Oregon State Poetry Association Past-President Elisabeth Walton Potter, Past Coordinator of National Register Nominations for the State Historic Preservation Office in Oregon Valery King, Oregon State University Associate Professor, Social Sciences and Government Information Elizabeth Tice, President of Willamette Valley Genealogical Society Dave Hegeman, OSL Special Collections Librarian Arlene Weible, OSL Government Documents Librarian Jey Wann, Oregon Documents Coordinator Kate Anderson, OSL Student Worker Alice LaViolette, OSL Reference Coordinator (convener) Eugene Newbill, OSL Serials Specialist (co-convener) Andrea Clarkson, OSL TBABS Specialist (Below 5 members were unable to attend, but sent recommendations via email): Mary Beth Herkert, Oregon State Archivist David Lewis, Cultural Resources Manager and Tribal Historian for Confederated Tribes of Grande Ronde Kyle Jansson, Coordinator of Oregon Heritage Commission Geoff Wexler, Librarian of Oregon Historical Society Layne Sawyer, Oregon State Archives
Finance Modeling	Jim Carbone, CFO analyst Jeff Morgan/Fabiola Flores, Secretary of State Financial Expert Kris Kautz, State financial Expert Renata Pilotto, OSL Accountant Sam Hall, OSL Board Susan Westin, LD/TBABS Manger Margie Harrison, GRS Manager Ann Reed, LD Rep. Andrea Blake, GRS Rep. Erich Peppler, TBABS Rep. Robin Speer, LAS Rep. Shawn Range, OSL Staff (convener)
Technology Usage	Bill Dahl, Oregon Parks and Recreation - Systems Architect Evviva Weinraub, OSU - Director of Emerging Technologies & Services Kyle Banerjee, OHSU - Digital Collections and Metadata Librarian Ismoon Hunter-Morton, OSL Board Christopher Adams, OSL Staff Scott Gilbert, OSL Staff Heather Pitts, OSL Staff Darci Hanning, OSL Staff Shawn Range, OSL Staff Luis Navarrete, OSL Staff (convener)

Stakeholder Group	Members
Internal Organization & Culture	Vicki Jorgensen , DAS HR Rebecca Gray, Department of Housing and community Services Toby Giddings, DAS Procurement Kevin Hamler-Dupras, Department of Education Susan Hathaway-Marxer, OSL Board of Trustees Chris Adams, OSL Staff Jey Wann, OSL Staff Jessica Rondema, OSL Staff Sarah Cunningham, OSL Staff Meagan Button, OSL Staff Scott Gilbert, OSL Staff Elke Bruton ,OSL Staff (convener)
State Library Board of Trustees	Aletha Bonebrake, Chair Baker City Ebonee Bell, Portland Sam Hall, Salem Susan Hathaway-Marxer, Portland Ismoon Hunter-Morton, Forest Grove Ray Miao, Bend
Oregon State Archives	Mary Beth Herkert, State Archivist
Oregon State Poetry Association	Eleanor Berry
Willamette Valley Genealogical Society	Elizabeth Tice
Oregon Historical Society	Geoff Wexler
Oregon Heritage Commission	David Lewis/ Kyle Jansson
SEIU	Eugene Newbill Alice LaViolette Glenn Stolburg Stacy Cowan
Legislature & Legislative Fiscal Office	John Borden
Oregon Library Association	Michele Burke
State Library Reorganization Steering Committee	MaryKay Dahlgreen, State Librarian Barry Pack, Office of COO Jeannine Beatrice, Office of COO Mary Beth Herkert, State Archives Susan Westin, OSL Manager Shawn Range, OSL Manager Margie Harrison, OSL Manager Sam Hall, State Library Board Heather Pitts, OSL Staff Joel Henderson, OSL Staff Christopher Rumbaugh, Salem Public Library Julie Curtis, State Lands Bob Disher, Oregon Textbook & Media

Oregon State Library Transformational Project Report
Recommendations of Preferred Alternatives
 by the
Oregon State Library Board of Trustees
 September 6, 2013

The OSL Board of Trustees reviewed the OSL Transformation Project Report and convened a meeting on September 6, 2013 to discuss their views and note their recommendations. Their preferences are noted on the table below that appears on pages 8 and 9 of the report. The Service Delivery Alternatives preferred by the OSL Board are shaded and their comments are added in italics.

Transformational Changes	Service Delivery Alternatives
<p>1: Library Services to State Government</p> <p style="text-align: center;">Details on Page 10</p>	<p><i>The following Alternatives are not mutually exclusive and may be complimentary.</i></p> <ul style="list-style-type: none"> • Provide at OSL centralized and consolidated acquisition and purchasing of agency library materials (Executive Branch primarily) <i>Board comment: This Alternative will save money and improve research.</i> • Provide centralized access to information across OSL, State Archives, State Law Library, and other agency libraries (e.g., develop a shared web portal) • Develop tailored OSL library information services for state agencies according to their needs <i>Board comment: Does this put restrictions on ability for staff to do research work?</i> • Implement a Fee-for-Service model for library services with tiered service levels to accommodate varying user needs at State Agencies as well as other users (e.g. local governments) <i>Board comments: This appears to be a funding model rather than a service delivery alternative. Concern about "commodification" of information. Will this make the service too expensive for agencies who need it?</i>
<p>2: Library Services to the Public</p> <p style="text-align: center;">Details on Page 12</p>	<ul style="list-style-type: none"> • Find additional and alternative funding sources for public services (currently funded through state agency assessment) <i>Board comments: The most likely source of additional funding would be through a foundation that would be best supported by appealing to the services provided to the public. Reducing services to the public is problematic, all of our funding is public money and the library is a public space.</i> • Clarify and reduce services to the public (primarily the open, public access to materials and facilities) <i>Board comment: would prefer to re-define and assess services before reducing.</i>

Transformational Changes	Service Delivery Alternatives
<p>3: OSL Oregon Heritage Materials Collections</p> <p>Details on Page 14</p>	<ul style="list-style-type: none"> Keep these collections at OSL. Seek direction from Legislature to clarify OSL role in preserving and making accessible Oregon's heritage collections Move these collections from OSL. Collaborate with partners to relocate Collections not in alignment with funding sources and mission
<p>4: Non-Government Materials Collections</p> <p>Details on Page 15</p>	<p><i>Includes genealogy, poetry, and Oregon Book Awards</i></p> <ul style="list-style-type: none"> Seek alternative funding to maintain these collections (currently funded through state agency assessment) <i>Board comment: These services are important but need to have different sources of funding. Board comment: What is the responsibility of state government to contribute to literary life of Oregon?</i> Discontinue OSL support for non-government materials
<p>5: TBABS Service Model (Talking Books and Braille Services)</p> <p>Details on Page 16</p>	<ul style="list-style-type: none"> Maintain TBABS and expand the current reach to serve more eligible Oregonians. Implement digital technology options to improve operations <i>Board comment: The ability to provide service to the P-20 community is essential.</i> Pursue collaboration on a regional, multi-state system Transition the TBABS service to another organization or institution
<p>6: Search Engine Administration for State website (ie. Oregon.gov)</p> <p>Details on Page 18</p>	<ul style="list-style-type: none"> Move the administration and maintenance to DAS Maintain current operations
<p>7: State of Oregon Documents</p> <p>Details on Page 19</p>	<ul style="list-style-type: none"> Convene a task force led by a third party to refine the recommendations in the February 2012 Report of the Workgroup on Libraries and Archives in Oregon State Government to consolidate Oregon documents with Archives Continue to move Oregon Documents program and OSL reference services to Archives as directed in the Governor's Balanced Budget of 2013-2015
<p>8: Oregon Center for the Book</p> <p>Details on Page 21</p>	<ul style="list-style-type: none"> Move to another cultural organization Discontinue <i>Board comment: Maintain this service. Financial impact is negligible but visibility is high. Does this decision more appropriately correspond to the Board action than to the Legislature?</i>
<p>9: Cultural Enrichment for State Employees (lectures, exhibits)</p> <p>Details on Page 22</p>	<ul style="list-style-type: none"> Move or partner with other institutions Discontinue funding from agency assessments <i>Board comments: Consider rebranding these events with outside sponsorship. Good marketing opportunity.</i>
<p>10: PLINKIT (Websites for Public Libraries)</p> <p>Details on Page 23</p>	<ul style="list-style-type: none"> Continue as is, for the time being. Phase out slowly <i>Board Comment: Does this decision more appropriately correspond to the Board action than to the Legislature?</i> Discontinue with an intentional transition plan for libraries

The OSL Board did not make recommendations for the Enhancement Changes.

Enhancement Changes	Service Delivery Alternatives
1: Library Development Consulting with Local Libraries Details on Page 24	<ul style="list-style-type: none"> • Expand consulting services • Maintain current service model with on-going improvements
2: TBABS Fundraising (Talking Books and Braille Services) Details on Page 25	<ul style="list-style-type: none"> • Expand fund development activities • Receive additional support from the general fund
3: Library Youth Services Program Details on Page 26	<ul style="list-style-type: none"> • Formal partnering with Oregon P-20 education community • Expand services with additional staff • Maintain current service level
4: Oregon Library Statistics Details on Page 27	<ul style="list-style-type: none"> • Maintain current service model with on-going improvements • Expand the staff to allow for consulting with local libraries on use of statistics for planning and advocacy
5: Alternative Funding Sources (e.g., Grant Writing and Other Funding) Details on Page 27	<ul style="list-style-type: none"> • Hire or contract with a grant writer/fund developer • Provide staff with training opportunities in grant writing • Partner with other organizations to develop fundable projects
6: Statewide Online Databases for Libraries Details on Page 28	<ul style="list-style-type: none"> • Seek to share database costs with local libraries • Maintain current operations
7: State Library Volunteers and Interns Details on Page 29	<ul style="list-style-type: none"> • Expand • Partner with other agencies • Re-purpose volunteers according to changes in services

October 25, 2013

From: Senator Elizabeth Steiner Hayward & Representative Nancy Nathanson

To: Sarah Miller, Deputy COO, Department of Administrative Services
MaryKay Dahlgreen, State Librarian, Oregon State Library
MaryBeth Herkert, State Archivist, Office of the Secretary of State
Kerry Tymchuk, Executive Director, Oregon Historical Society
Cathryn Bowie, Director, State of Oregon Law Library

Reorganization Plan for the Oregon State Library, State Archives, Oregon Historical Society, and State of Oregon Law Library

Overview

Over the past decade or so, there has been increasing overlap between the missions and responsibilities of the Oregon State Library (OSL), the State Archives, the Oregon Historical Society (OHS), and the State of Oregon Law Library (SOLL). This report outlines the legislative proposal that should be used to reorganize, streamline, and clarify functions among these agencies (note that while the OHS is not a state agency, it is referred to as such in this document for simplicity of nomenclature). The overarching principle guiding the reorganization relates first to the functions and types of materials being considered, then to the populations being served by a given agency.

This plan was developed using the reports issued by the Secretary of State in 2012 and the Library Reorganization Task Force in 2013 (which included significant labor participation), specific proposals from each agency leader and the Oregon Library Association, and information from the Department of Administrative Services (DAS). It is the intent of the Ways & Means Sub-Committee on General Government that DAS will lead the implementation process, with full cooperation and assistance from the four agencies. Of note, this report deliberately does not include very specific details as to how each aspect of it is to be accomplished. Rather, this level of detail is left to those implementing the reorganization. In the event that recommendations in this report are not completely clear to those working on its implementation, the Sub-Committee expects that the Deputy COO or her designee will consult with relevant members of the Sub-Committee prior to proceeding with any unclear recommendation. The Sub-Committee expects to receive regular progress reports from DAS and others involved with implementation of the reorganization, and to be informed immediately if there are significant problems with the implementation process.

Proposed Implementation Timeline

October 2013: Report circulated to all relevant parties. DAS convenes workgroup from relevant agencies (including at least some members of the current Library Reorganization Task Force) to develop implementation plan. Teams from the workgroup, with additional members as appropriate, will plan for specific changes to be implemented.

December 2013: DAS & relevant agency leaders work with Senator Steiner Hayward & Legislative Counsel to refine legislation that will revise statute as needed to reflect new responsibilities of relevant agencies. Although the bill will have an emergency clause to allow immediate work on various aspects of implementation, the effective date for major changes will be July 1, 2015.

January 2014: DAS reports on progress of the workgroup to the Interim Ways & Means Sub-Committee on General Government

February 2014: Pass legislation for statute revisions with phased implementations between Feb 2014 and June 30, 2015 (end of biennium).

March 2014 - July 2015: DAS continues to staff and lead revisions, implementation plan, and development of new budgets based on new functions and responsibilities of relevant agencies.

February 2015 - June 2015: Presentation of relevant agency budgets to appropriate Ways & Means Committees.

June 2015: New budgets pass

July 1, 2015: All implementation complete, responsibilities transferred to new agencies, Integrated Online Reference System implemented, etc.

Creation of an Integrated Online Reference System

It will be the responsibility of the Department of Administrative Services (DAS) to facilitate the adoption and/or creation of an integrated reference system that provides one online location to search the materials (including subscriptions) available in all agencies.¹ Working collaboratively with DAS, all relevant organizations (Oregon Historical Society², the Archives, State of Oregon Law Library, the State Library and all agency libraries) will assist in the creation of this system. DAS will seek clarification from the legislature and will consistently consult the Ways & Means Sub-Committee on General Government or its Co-Chairs and relevant members often to ensure the process is on point with the intent of this document. However, DAS will have final decision authority in this process.

In order to optimize the effectiveness of this system, as many materials as possible need to become electronically accessible and available for online viewing.³ Access to relevant information housed in ORMS should also be included and made available through this system. Additionally, this online system should provide access to all agency library materials (e.g., Department of Environmental Quality, Oregon Department of Transportation).

While the State Library will ultimately manage this combined reference system, it will be the responsibility of DAS to oversee the design and building of this database. Upon completion the State Library will be responsible for developing a robust marketing and training campaign that will provide information to all appropriate audience about what is available through database and how to access these new services. It is expected that each agency will continue to staff reference requests that fall within its domain.

Shared Client Services

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

¹ For the creation of the Integrated Online Reference system, use of the ORMS web portal (WebDrawer) with a robust, "Google-like" search engine should be thoroughly tested and considered before any new system is created by DAS. ORMS could be used as a basis but DAS should ultimately decide which organization would be responsible for the database.

² It is important to note that the Oregon Historical Society is an independent 501©(3), and is not a state agency. The Oregon State Legislature has a history dating back to 1899 of providing a biennial appropriation to OHS, thereby recognizing the intrinsic link between OHS and the State of Oregon, and the value that OHS provides to the citizens of the state. The funding level of this appropriation, however, has been relatively minimal. In requesting that OHS perform additional duties that were previously performed by state agencies, the legislature assumes a responsibility to provide OHS with a stable biennial appropriation consistent with that of other comparable agencies, adequately compensating them for expenses associated with these duties and responsibilities and ensuring they can continue to perform their non-governmental functions.

³ DAS should explore providing electronic access and use the ORMS web Portal (WebDrawer) application. If the record is in an electronic form then it is viewable and if it is still in paper, all of the information to find it is electronically accessible and the actual records can be digitized upon request and put into the system at that time.

Storage & Location of Materials:

In cases where the responsibility of certain materials will shift into a different organization, the newly responsible organization will have the authority to decide the appropriate physical location for these materials. For example, it may be appropriate to display certain state documents in a more public setting. However, when the materials are requested it will still remain the responsibility of the responsible organization to provide access to them.

Division of Functions:

- **Cultural Enrichment for State Employees:** Programs such as the “Library Lecture Series” should be discontinued.
- **Document Repository:** With the exception of legal documents, this function should remain with the Archives. All these materials should be electronically accessible and available through the Integrated Online Reference System.⁴
- **Federal documents:**⁵ This function will shift to the state Archives. However, it is important to note that the State of Oregon Law Library (SOLL) and other state and local agencies may require access to these documents. In order to ensure their availability and easy access, the majority of these documents must become electronically accessible or available through the Integrated Online Reference System.
- **Legal Library Resource Services:** The SOLL must be authorized through statute to provide consulting services to county governments (including law libraries) and provide county law libraries with electronic legal resources.
- **Legislative Research Assistance:** These materials will remain with the Archives and will be electronically accessible, or available, and through ORMS or the Integrated Online Reference System.
- **Licensing Legal Resources:** Since the SOLL is the primary purchaser of electronic legal resources for all branches of Oregon State government, this will remain a function of the SOLL.
- **Marketing and Training Campaign:** The State Library will focus on increasing its marketing and training campaign to increase access to services and use of references. The State Library, in collaboration with DAS, will determine the best method for increasing this campaign. The success of this function will be subject to review every biennium as part of OSL’s Key Performance Measures.
- **Official Documents:**⁶ This is a function that should be revisited. The Archives will study the issue and create a report on how this function can change or shift.

⁴ During this process, DAS (in collaboration with the appropriate organizations) must create a standard for determining what constitutes a legal document. Legal documents will remain under the responsibility of SOLL.

⁵ Please note that we recognize that certain shifts of responsibility will require re-negotiations with the Federal Government Printing Office. These types of issues will be identified and handled during the reorganization process.

⁶ Official Documents describes a variety of records that statute designates to be filed with the Secretary of State. In large part these are legacy activities performed by the Secretary of

- **Oregon Bulletin:** The Archives will continue to produce the Oregon Bulletin. However, the Archives must continue to reformat the website to be more user friendly.
- **Oregon Center for the Book:** This resource is not extensively used and will be discontinued. The federal funds should be reallocated to areas of greater need, as determined by DAS in consultation with the State Library and the Oregon Library Association.
- **Oregon Genealogy:** This function will fully shift to the Oregon Historical Society. OHS should then determine the best method of collaborating with outside genealogical groups, such as the Willamette Valley Genealogical Society.
- **Oregon History Project & Oregon Encyclopedia:** This function should shift to the Oregon Historical Society with the exception of materials that are needed for public record. Materials for public record will remain with the Archives and the two agencies will determine the best method to collaborate closely.
- **Oral History Resources:** This function will shift completely to the Oregon Historical Society.
- **Processing and Preserving Collections:** This function, and relevant materials, should shift fully to the Archives. The Archives will be responsible for continuing to expand into ORMS. However, any materials that are no longer required by law but should be kept for historical purposes will then be moved to the Oregon Historical Society.
- **Publications Unit:** This function will remain with the Archives, with the following exceptions:
 - The SOLL will continue to publish the Oregon Appellate Courts' Decisions in online and print format. During the reorganization process, SOLL will determine any necessary FTE changes to transition existing print and online publications to a more user friendly, accessible and usable format.
 - Oregon Historical Society will continue to publish the *Oregon Historical Quarterly*.
- **Records Management:** This function will remain with the Archives and the Archives will remain responsible for ORMS.
- **Reference Assistance for Government Records:** All required state documents will be consolidated with the Archives. Any materials that are not government records and should be kept for historical purposes will then be moved to the Oregon Historical Society. The majority or all of these materials should be electronically accessible and available through the Integrated Online Reference System.
- **Regional Federal Documents Depository:** The Archives will become responsible for determining the best method of collaboration.
- **Search Engine Administration for Oregon.gov:** This function will shift to DAS.

State from a period when the office acted as a central filing point. Most significant filings at the state level are: oaths of office, executive orders, clemencies and extradition records. Annexations are the primary local government filing and then they are reported by the Archives to the population center at PSU and the department of revenue to satisfy legal requirements. Periodically the federal census bureau requires these filings to be certified.

- **Security Copy Depository:** This function will remain with the Archives. The materials should continue to be electronically available and when possible, available for online viewing, through ORMS.
- **State Documents:** All required state documents will be consolidated with the Archives and any materials that are not government records and should be kept for historical purposes will then be moved to the Oregon Historical Society.⁷
- **State History:** Similar to the State Documents, all required state documents will be consolidated with the Archives and any materials that are not government records and should be kept for historical purposes will then be moved to the Oregon Historical Society.
- **State Records Center:** This function will remain with the Archives.
- **Statewide Database & Subscription Licensing:** The State Library will continue to coordinate the selection, negotiation, purchase, and maintenance of databases and subscriptions for all state agencies. This is wise use of public resources and provides seamless access to quality resources in all libraries in Oregon and beyond through the Libraries of Oregon portal. Statewide access to this core set of databases and subscriptions means that students at all levels can use quality information. Access to these databases and subscriptions for all agencies should be provided through the Integrated Online Reference System.
- **Statewide Historical Records Advisory Board (SHRAB):** This function will remain with the Archives. However, the Oregon Historical Society should consistently be involved.
- **Support for Local Libraries:** The State Library should supply ample support to local libraries through the various functions listed below:
 - **Collecting and Reporting Library Statistics:** The State Library should continue to maintain and collect these data since this function has become essential to library directors.
 - **Continuing Education Programs:** The State Library should continue this function and increase its virtual and in-person trainings for both librarians and paraprofessional staff around the state.
 - **Library Services and Technology Act Grants:** The State Library will maintain these grants. This is a primary source of funding for innovation in Oregon public libraries. This improves library services for all Oregonians and has been found to be extremely cost-effective in achieving this goal.
 - **Oregon School Library Information System (OSLIS):** The State Library should continue to maintain and provide access to OSLIS. The State Library gives K-12 teachers and students access to the statewide databases and subscriptions along with research tutorials and guides. The State Library should begin incorporating more OSLIS content and navigation earlier in its teacher trainings.
 - **Ready to Read Grant Program:** The State Library will continue to provide this program. In addition to providing cash for local programs, the State

⁷ As noted previously, the Archives will be responsible for the delivery and management of these materials. However, the Archives may store them wherever it is deemed appropriate.

Library development staff members provide guidance and support to Oregon libraries in developing their early literacy and youth reading initiatives.

Where appropriate, the State Library should coordinate with the state's Early Learning initiatives.

- **Talking Book and Braille Services (TBABS):** Many public libraries do not have the collections or staffing to service sight-impaired Oregonians. The State Library will continue to provide this function. The State Library should continue to increase significantly the uptake of BARD by all TBABS members.
- **PLINKIT:** This function should be discontinued since it is no longer a useful tool for the vast majority of local libraries. The State Library should provide transitional consultation for those few systems still using PLINKIT.

Division of Functions/Materials Summary by Department

The Archives Division

- Document Repository
- Federal Documents
- Legislative Research Assistance
- Official Documents Review
- Oregon Bulletin
- Processing and Preserving Collections
- Publications Unit (with exceptions, see above)
- Records Management
- Reference Assistance for Collections
- Regional Federal Documents Depository
- Security Copy Depository
- State Documents
- State History
- State Records Center
- Statewide Historical Records Advisory Board (SHRAB)

Department of Administrative Services (DAS)

- Search Engine Administration for Oregon.gov

The Oregon Historical Society

- Oregon Genealogy
- Oregon History Project & Oregon Encyclopedia
- Oral History Resources

The State of Oregon Law Library

- Legal Library Resource Services
- Licensing Legal Resources

The State of Oregon Library

- Integrated Online Reference System coordination

- Marketing and Training Campaign
- Statewide Database Licensing
- Support Local Libraries
 - Collecting and Reporting Library Stats
 - Continuing Education Programs
 - Library Services and Technology Act Grants
 - Oregon School Library Information System (OSLIS)
 - Ready to Read Grant Program
- Talking Book and Braille Services (TBABS)

Discontinued Functions:

- Cultural Enrichment for State Employees
- Oregon Center for the Book
- PLINKIT



**Response of the Oregon Library Association to the
Oregon State Library Reorganization Plan
Dated October 25th, 2013**

◆ **Executive Summary**

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

Goals

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

Specific Comments

- ◆ Integrated online reference system. We recommend a better definition of what this means, identification of intended audiences, exploration of existing successful information portals, involvement of existing expertise within the Oregon library community, and adequate funding.
 - ◆ Storage and location of materials. Our primary concern is access: whichever agency or organization that retains material must adhere to best practices in digital delivery and public access.
- Division of functions.
- ◆ Documents: Again, our main concern is access. If federal documents are moved to the Archives from the State Library, we urge the adoption of policies that address the retention of valuable state publications. We also urge the State to provide adequate reference expertise within the Archives for utilization of federal documents.
 - ◆ Legal library resources: We support the Plan's recommendation to use the unique expertise of the State Law Library to enhance access to legal information resources.
 - ◆ Oregon Center for the Book: We suggest that OLA consult with the State Library, about reassigning the various tasks and roles of the Center.
 - ◆ Oregon Historical Society: Again, our concern is access. We are very concerned about moving materials to a private non-profit organization with little accountability to the state, and relying on this private institution to provide robust access to the materials.
 - ◆ OSLIS: We encourage greater support for OSLIS, recognizing this takes increased funding.
 - ◆ Plinkit: The OLA Technology Roundtable will work with the State Library to address how to best assist the 50+ Oregon libraries currently using Plinkit with migration to other platforms.
 - ◆ Proposed Implementation Timeline. Our main concern about the aggressive timeline is the design and implementation of the integrated online information system.

Table of Contents

Executive Summary	1
◆ Introduction	2
Goals of Transformation Process from the Perspective of the Oregon Library Association.....	2
Agency and Organization Missions	3
Elements NOT Addressed in This Response.....	3
◆ Creation of an Integrated Online Reference System.....	4
◆ Shared Client Services	5
◆ Storage & Location of Materials:.....	5
◆ Division of Functions (Documents):.....	5
◆ Division of Functions (Legal library resources):.....	6
◆ Division of Functions (Oregon Center for the Book):.....	6
◆ Division of Functions (Oregon Historical Society role):.....	6
◆ Division of Functions (OSLIS):	7
◆ Division of Functions (Plinkit):.....	7
◆ Proposed Implementation Timeline.....	7

◆ Introduction

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

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

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

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

- Improved access to government information for state employees and Oregonians;
- Improved access to information needed by state employees to manage wisely;
- Improved access to Oregon’s history;

- Thoughtful preservation of the state’s record and history;
- Leadership in assisting libraries to serve all Oregonians;
- Robust service to the print disabled.

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

Agency and Organization Missions

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

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

Elements NOT Addressed in This Response

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

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

◆ Creation of an Integrated Online Reference System

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

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

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

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

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

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

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

OLA Perspective

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

We suggest the following steps for the Portal Planning Team:

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

◆ Shared Client Services

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

OLA Perspective

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

◆ Storage & Location of Materials:

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

OLA Perspective

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

◆ Division of Functions (Documents):

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

OLA Perspective

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

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

◆ **Division of Functions (Legal library resources):**

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

OLA Perspective

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

◆ **Division of Functions (Oregon Center for the Book):**

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

OLA Perspective

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

◆ **Division of Functions (Oregon Historical Society role):**

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

OLA Perspective

The Oregon Historical Society is a private non-profit organization with little accountability to the State. It does not have a strong record of providing adequate free public access to its library and

information resources. We are very hesitant about moving materials to OHS and relying upon this private institution to preserve those materials and provide robust access. These concerns have been acknowledged in the November 1 addendum to the Reorganization Plan.

◆ Division of Functions (OSLIS):

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

OLA Perspective

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

◆ Division of Functions (Plinkit):

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

OLA Perspective

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

◆ Proposed Implementation Timeline

OLA Perspective

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

Statute	Mission	Practice
<p>357.003 (2) Provide library services suitable to support informed decisions by the personnel of government.</p> <p>357.005 (2)(b) Provide advice and assistance to ...and to departments and agencies of state government in matters concerning the establishment, support, operation, improvement and coordination of libraries and library services, and the cooperation between libraries.</p> <p>357.005 (2) (c) Maintain and develop appropriate collections of library materials... to meet the reference and research needs of the Legislative Assembly and of the state government by providing library services thereto.</p>	<p>Provide quality information services to Oregon state government;</p>	<p>Reference assistance Materials</p>
<p>357.005 (2) (g) Provide library services to people who are blind or print-disabled in cooperation with the United States Library of Congress.</p>	<p>Provide quality library services to blind and print-disabled Oregonians;</p>	<p>TBABS</p>
<p>357.003 (1) To promote the establishment, development, and support of library services for all the people of this state.</p> <p>357.003 (3) To encourage cooperation between units of government and between and among libraries and to encourage the joint exercise of powers where such cooperation or joint exercise will increase the extent of library services in a fair and equitable manner.</p> <p>357.005 (2) (a) Promote adequate library services for all the people of this state.</p> <p>(b) Provide advice and assistance to libraries, to library boards, to</p>	<p>Provide leadership, grants, and other assistance to improve library service for all Oregonians.</p>	<p>Library Development</p>

<p>units of local government empowered to establish libraries ...and the cooperation between libraries.</p> <p>(d) With the advice of the libraries of the state, provide a network whereby the library resources in this state are made available to all the people of this state under reasonable conditions and subject to appropriate compensation to libraries providing library services to persons beyond their primary clientele.</p> <p>(e) Provide for state participation in regional, national, or international library networks and systems designed to increase the quality of library services for the people of this state.</p> <p>(h) Provide for in-service and continuing education programs for library personnel in the state.</p> <p>(i) Expend such federal, state, and provide funds as may be available to the state to demonstrate, develop, and support library services in accordance with long range plans for statewide development and coordination of library services.</p> <p>(k) Report statistical data on public, school, and other libraries of this state useful in the conduct of the work of the State Library and in the development of effective library services throughout the state.</p> <p>(l) Carry out other activities authorized by law for the development of library services for the people of this state.</p>		
<p>357.003 (4) To ensure that copies of all public documents and access to state agency</p>		<p>Oregon Documents program</p>

information in electronic form are available to citizens through a system of depository libraries		
357.005 (2) (c) Maintain and develop appropriate collections of library materials to supplement the collections and services of other libraries in the state...		
357.005 (2) (f) Provide for the people of this state specialized library services not generally available in other libraries in the state.		
357.005 (2) (j) Prescribe the conditions for use of state documents in depository libraries, and provide for permanent public access to state government publications.		Oregon Documents program
357.005 (3) State Library books shall be loaned free of charge to the people of Oregon through existing libraries.		Interlibrary Loan
		Reference room
		Genealogy
		Public access computers
		Circulation of materials

MISCELLANEOUS INFORMATION

Klamath County Library celebrates new branch

By MILES SARI H&N Staff Reporter | Posted: Sunday, June 22, 2014 12:00 am



South Suburban Library Grand Opening

From left to right: Chuck Wells, president of the library advisory board, Ken Masten, library foundation chairman, Christy Davis, library executive director, Jim Bellet, Klamath County commissioner Nancie Carlson, president of the Friends of Klamath County Library, and MaryKay Dahlgreen, Oregon State librarian.

At the grand opening of the South Suburban Branch of the Klamath County Library Saturday afternoon, Oregon State Librarian MaryKay Dahlgreen challenged the notion that reading and libraries are dying.

“I don’t think that’s true, as we can see,” Dahlgreen said, pointing to the finished library standing behind her. “Oregonians love libraries.”

Dahlgreen was one of six speakers on hand at the ribbon-cutting ceremony, along with Nancie Carlson, president of the Friends of Klamath County Library, Chuck Wells, president of the library advisory board, Ken Masten, library foundation chairman, Jim Bellet, Klamath County commissioner, and Christy Davis, library executive director.

More than 150 people from the community were in attendance for the opening celebration, which marked the conclusion of the three-year project.

In comparison to its former location in the Town and Country shopping center, the new library provides patrons in the south suburbs a spacious, 4,000 square foot building with, more computers, a 600 square-foot room for library programs, a back patio with garden and play space for children, as well as a total of 3,600 circulated items, which is more than double the circulated 1,700 items available at the former location in May 2013.

After three years of construction, Davis said she is excited for people to start coming into the library and use its resources, especially the summer programs the library has to offer.

“You do feel like when you’re doing the construction that you’re never going to get to this day, and then you do,” Davis said while watching a slideshow of images that documented the library’s journey from initial construction to final touches before the grand opening.

The building and property for the branch, which is located across the parking lot of Mia and Pias Pizzeria and Brewhouse, was purchased in 2011, and funding for the renovations was completed through myriad donors, including the Oregon Community Foundation, Ford Family Foundation, Avista Corporation, Collins Foundation, Autzen Foundation, Meyer Memorial Trust, Asurion Corporation, Gordon Elwood Foundation and the Dorothy Collier Foundation.

Masten said funding was also achieved through \$265,000 of fundraising efforts by the Klamath County Library Foundation, which helped cover more than half of the \$548,970 it cost to completely remodel the building.

With the final cost of the new library totaling just under \$800,000, according to a library press release, Davis noted that opening the South Suburban Branch in a new building was a tremendous feat.

“It’s 2014 and we say the recession is over, but it’s always slower here,” Davis said. “This is a triumph because this building was during a recession.”

Dahlgreen, who goes to most new library openings throughout the state, also noted the significance of the renovation project, especially in a small area with a high poverty rate.

“This is a priority for the community, and that is really true of a lot of Oregon communities,” Dahlgreen said. People who say libraries are dying aren’t really informed, and have a lot of misconceptions about what libraries are anymore.

Dahlgreen lauded the success of the library, and attributed its strong presence in the community to library staff.

“There’s a brilliant staff here, really phenomenal people,” Dahlgreen said. “You can have a library full of books, but it’s the staff that really makes the difference.”

msari@heraldandnews.com; @MsariHN

CORRESPONDENCE

From: Margie Harrison
Sent: Thursday, June 12, 2014 3:11 PM
To: Robin Speer; AllStateLibrary
Subject: RE: June 2014 eNewsletter - Volunteer Service at the State Library

Great newsletter. I love the volunteer spotlight! It's wonderful to see their happy faces, learn the details of the work they are doing, and get a glimpse of how they feel about the work they're doing. Great job, and Way to Go to our wonderful volunteers! !

From: Robin Speer
Sent: Thursday, June 12, 2014 2:27 PM
To: AllStateLibrary
Subject: June 2014 eNewsletter - Volunteer Service at the State Library

June 2014, Issue 9

Welcome to the Volunteer Program eNewsletter. The purpose of this communication is to connect Oregon State Library (OSL) volunteers and staff with each other and provide information relative to our volunteer program.

TOOLBOX TIP

For staff members who work with volunteers we have developed a toolbox of ideas and articles that will be added to over time. Inside are policies, strategic plans, forms, how to's and a TIPS folder. [Take a look at what is available today.](#)

This issue's article spotlight is "[Tips for Managing Interns](#)" from the Columbus Internships website. Here is a highlight of the important role you play when mentoring an intern.

"...Introducing your intern to your network is one of the valuable things you can offer.

An added benefit for interns is developing professional networks in their career field of interest. Employers should strive to introduce interns to colleagues, business associates, customers and suppliers. Employers should include interns in at least a few internal and external meetings..."

STATISTICS

Total volunteer hours for 2014 = **2,489**
 Equivalent to an FTE of **2.88** staff positions
 Total number of volunteers for 2013 = **156**

UPCOMING EVENTS

BUILDING CLOSURE DAYS

Next holiday is Friday the 4th of July, and the State Library building will be closed.

VOLUNTEER SPOTLIGHT

We currently have three volunteers who are working on tasks that will make library materials in our collection more accessible for use. Each volunteer is doing a slightly different process unique to the specific collection they work with.



Kyra Cardella

Kyra is currently an MLIS student at the University of Washington and on track to graduate this month. Kyra is working on a cataloging project adding content notes and subject headings for the Oregon Vertical Files -- the biography files. By adding this valuable information, Kyra is making it easier to know what kinds of things are in each folder and is also bringing to light hidden resources here in the Oregon State Library building and making them discoverable. Here is a sample of information about "Queen Marie"
<http://catalog.osl.state.or.us/record=b2285524~S2>

Kyra says "Working in Technical Services has been fun; it gives me some cataloging practice, and I get to work with great people. I am fairly new to Oregon, and determining subject headings is also teaching me a little bit about my adopted state's historical figures and important milestones. I didn't know this before we moved to Salem, but apparently my husband Eric's great-great-great-etc. grandfather was a brother of Jason Lee. I'll have to chat with the genealogy folks sometime to figure out the exact connection!"



Lynn Kneeland

Lynn is inputting brief records for Oregon collection items that are currently not in the online catalog. Although the vast majority of items in OSL's collection are in the online catalog, there are still some strange and obscure publications that haven't been included. These items include publications on the history of various Oregon libraries, anniversary publications of historic Oregon churches, and brochures and other publications from some unusual Oregon organizations. Lynn's records allow anyone to find these items by author, title, or keyword. Because the publications are frequently in an unusual format, Lynn has to spend part of her time trying to find a date, publisher, and sometimes even a title! She is also transcribing information from the State Library shelf list that tells where the Library originally got the publication, or other interesting information.

Lynn says "Every week, ever so slowly, the number of books I've added to the catalog grows. As a student intending on pursuing a degree in information and library science, handling these fascinating books and materials archived in the Oregon collection has thrilled my love of books and the preservation of the history of our state."



Dick Johnson

Dick retired 14 years ago from a long career in administration for Children's Services and the Oregon Youth Authority. Family history research has been a passion of his and he has been volunteering in our reference room as a Genealogy information volunteer since 2002.

Dick is inputting content notes in the catalog records for the Oregon vertical file, which is a collection of clippings, brochures, and other ephemera about various Oregon topics. Each folder may have only 1 item, but some have 20-50, and some topics have more than one folder. Without the content notes, there's no way to tell what's in the folder. State Library staff have sometimes pulled folders for a patron, only to find that the patron has already seen everything in the folder. The content notes will allow patrons to make a more informed decision about whether or not they need to see the folder. This is a huge project, as there are literally thousands of VF folders.

VOLUNTEER APPRECIATION EVENT

On April 16 we celebrated our wonderful volunteers who graciously provide their skills and time to perform important tasks at the State Library. We had a short program featuring Aletha Bonebrake, chair of the Board, as a guest speaker. Each volunteer received a gift and certificate listing their total hours for 2013. After the program, volunteers were invited to view the William Stafford exhibit on the second floor and hear a lecture by his son, Kim Stafford. The event was lots of fun. Thank you to all of our volunteers!

SUCCESSFUL FOOD DRIVE

The State Library participated in the Governor's Annual Food Drive for February. Volunteers are always welcome to contribute and participate. We held a book/bake/craft sale, a soup & bread sale, and had collection sites in all departments for donated items. The final totals were:

Pounds of food collected = 268 (up from 248 last year)
 Cash/Check donations = \$679 (up from \$503 last year)
 Payroll deductions = \$749 (up from \$540 last year)

This equals **5,980 lbs** of food! A **BIG** thank you to everyone who donated food, cash, bought items from the sale and supported the soup & bread luncheon.

WELCOME TO NEW VOLUNTEERS AT THE STATE LIBRARY

Julie Woodward helps as a genealogy information volunteer on Friday mornings. Julie has been a library assistant in the past and enjoys researching family history.

Florence Christensen volunteers as a book inspector for Talking Books on Monday afternoons. She enjoys doing a good service for others and wants to support the Talking Book program.

Bill Blitz helps as a genealogy information volunteer on Thursday afternoons. He recently completed a commitment with the Peace Corps in the Ukraine. He is currently volunteering as a tour guide at the Capitol and at several other organizations.

Beth Manzo volunteers in Library Development assisting with office tasks. Beth enjoys volunteering for several organizations such as Habitat for Humanity, Marion Polk Food Share and her church.

Nela Hodges volunteers as a book inspector for Talking Books on Monday afternoons. Nela really likes what the Talking Book program provides for people and wants to help.

Robert Fleming helps as an equipment maintenance volunteer for Talking Books. Robert was part of the school to work program and take your kids to work day for two years while he was in the 6th and 7th grades. He really liked his experience here at the library and wants to volunteer while he is finishing high school. He also wants to learn more about the library and wants to serve the community.

Max Waddell helps as a genealogy information volunteer on Tuesday mornings. He has been a history major in college and really enjoys research.

Alyssa Collins helps as a genealogy information volunteer on Thursday mornings. She has her undergraduate degree and is presently considering a masters program in library science. She is interested in learning about all aspects of the library.

IT'S HARD TO SAY GOOD-BYE

Our volunteers become part of the OSL family, and it is hard to say good-bye when they move on to new adventures. Recently Noeline Briski, Callie Hardwick-Wood and Rita Rudder left our volunteer service for new jobs, new volunteer opportunities and new interests. Kim Gorman is on an internship assignment for the summer, and Julie Woodward is in a temporary position with the state. We may see them back in a few months. We are so grateful they have shared their time and talents with the State Library, and we wish them well.

Message from the Volunteer Program Cross-Team Work Group

We hope you have enjoyed this eNewsletter and want to thank you for taking the time to read it. We welcome your feedback to improve the information we provide. Our goal is to provide helpful information for OSL volunteers and staff.

Robin Speer, Volunteer Program Coordinator
 Susan Westin, LD and TBABS Program Manager
 Jen Maurer, LD School Library Consultant
 Erich Peppler, TBABS Circulation Coordinator
 Alice LaViolette, GRS Information Specialist Librarian
 Dave Hegeman, GRS Business Reference Librarian
 Elizabeth Tice, Willamette Valley Genealogical Society President

From: Christy Davis

Sent: Thursday, June 12, 2014 6:44 PM

To: Susan Westin; Jennifer Maurer; Katie Anderson; Darci Hanning; Ann Reed; Arlene Weible; Ferol Weyand; MaryKay Dahlgreen; Jey Wann; Elke Bruton

Subject: Thank you!

Dear Oregon State Library Staff,

Thank you so much for hosting us all this past Monday. It was so good to put names to faces, take some notes, do some networking, and poke around the building (even though

Jey did NOT give up the secret passageways and I forgot to look at MaryKay's bathroom!). I found it valuable and reassuring and I feel I now know a bit better who to ask for what, and that Ann especially wishes to be called early and often. I also heard some of you say you'd like to come visit. So look for invitations. MaryKay, you're first but I think Elke will soon be in the line-up. Thank you again for a nice comprehensive view of the library's services, staff, resources, and space.

Sincerely,

Christy Davis

Library Director
Klamath County Library Service District

From: Jessica Rondema
Sent: Thursday, June 19, 2014 1:24 PM
To: Deanne Smith; AllStateLibrary
Subject: RE: 658.3142 Dewey Salute to Nathan

That sounds like no small task. Great work, Nathan!

Jessica Rondema
Executive Assistant
Oregon State Library

From: Deanne Smith
Sent: Thursday, June 19, 2014 11:49 AM
To: AllStateLibrary
Subject: 658.3142 Dewey Salute to Nathan

A BIG thank you to Nathan for boxing up 61 boxes of withdrawn items, a lot of single sheet items, that are destined for the shredder, and hauling the boxes down to the basement.

I don't know what we would do if we didn't have our student workers. Oh wait... we would have to do it ourselves. ☺

Thank you Nathan!!!

--Deanne

Deanne R. Smith
Oregon State Library

From: Kaylyn F. Mabey
Sent: Friday, June 20, 2014 7:55 PM

To: Alice Laviolette

Subject: RE: TIP visit to State Library

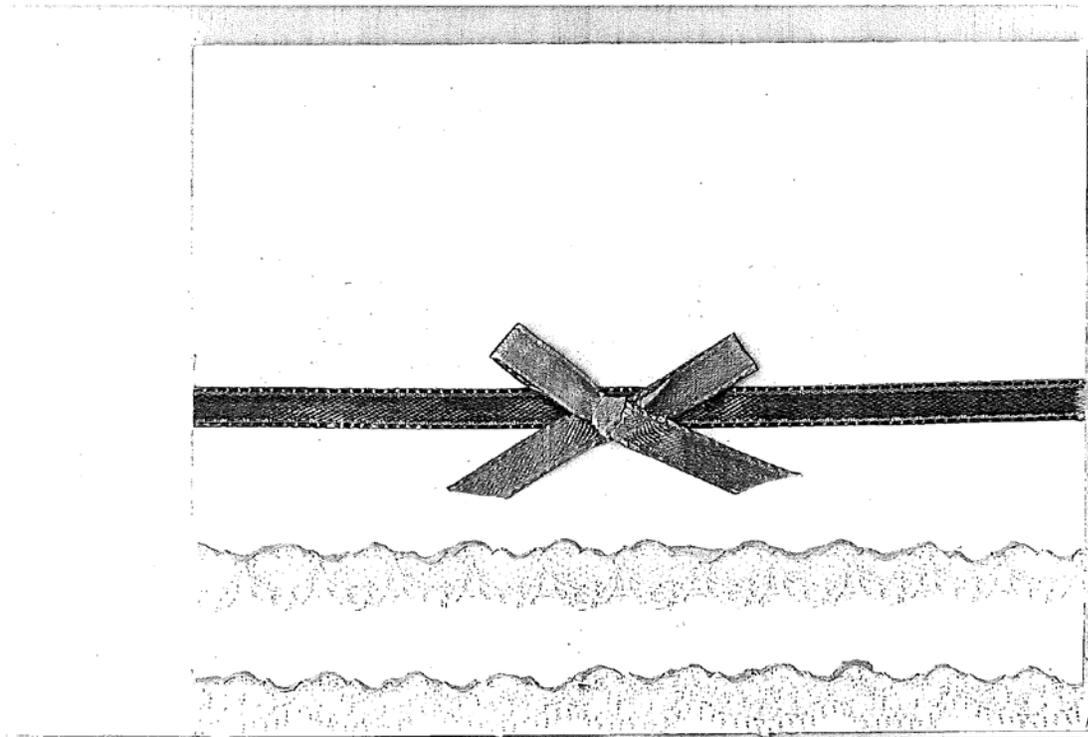
Thanks for making our visit memorable Alice. I appreciate your enthusiasm and support for our TIP program not only as the leader, but as the mother of a TIP kid. The week before TIP started he asked me to take him to the Oregon State Library so he could look up some newspaper articles and an obituary for Thomas Benjamin Kay. I LOVE that his first thought was the state library, and of course, I brought him over.

We have an interesting bunch of kids this year, very research-oriented. They have really enjoyed the research skills and sources we've used, particularly the internet resource links suggested for research at home. It's been fun to hear each day of training the new things they've discovered about their historical character. It would not surprise me in the least if they came back to the library to use more resources.

Thank you!

Kaylyn





FOR THE WORK YOU DO & THE
SERVICE YOU PROVIDE,
Thank you.

My MOTHER, HELEN J.
BAOMAND PASSED JUNE 10
OF THIS YEAR AND THOUGH
SHE RETAINED HER WIT &
SENSE OF HUMOR TO THE
END SHE SUFFERED FROM
MACULAR DEGENERATION.
IT EVENTUALLY MADE
READING IMPOSSIBLE FOR

HER. SHE HAD MANY OTHER
PURSUITS AS WELL, SUCH AS
MAKING CARDS SUCH AS
THIS ONE TO PASS OUT
TO FAMILY & FRIENDS.

I THOUGHT IT ONLY
APPROPRIATE TO SEND A
DONATION IN ONE OF HER
CARDS, IN THE HOPE THAT
IT PUTS A SMILE ON SOME
ONES FACE. SHE PROVIDED
SO MANY IN HER LIFETIME.

Thank you AGAIN

Timothy BAOMAND
6/21/14

From: Heather Pitts
Sent: Tuesday, June 24, 2014 4:22 PM
To: Deanne Smith; AllStateLibrary
Subject: RE: 658.3142 Dewey Salute to Kate

Hooray!! This is so fantastic. Way to go, Kate!

From: Margie Harrison
Sent: Tuesday, June 24, 2014 4:20 PM
To: Kate McGann; Darci Hanning; AllStateLibrary
Subject: RE: 658.3142 Dewey Salute to Kate

Kate is such an incredible asset to the GRS team and to OSL. She is a joy to work with and she does amazing work. Thank you, Kate.

Margie

From: Kate McGann
Sent: Tuesday, June 24, 2014 4:08 PM
To: Darci Hanning; AllStateLibrary
Subject: RE: 658.3142 Dewey Salute to Kate

This is a really big deal and Kate is AMAZING!!

From: Darci Hanning
Sent: Tuesday, June 24, 2014 3:54 PM
To: AllStateLibrary
Subject: RE: 658.3142 Dewey Salute to Kate

Wowza! Way to go, Kate!!

 Darci Hanning * Technology Development Consultant * Library Development Services
 Oregon State Library, 250 Winter St. NE, Salem, OR 97301

From: Deanne Smith
Sent: Tuesday, June 24, 2014 3:45 PM
To: AllStateLibrary
Subject: 658.3142 Dewey Salute to Kate

In July of 2012, Kate A. began the arduous task of inputting short records into our catalog for all of the Oregon vertical file folders. You are probably wondering what I am referring to. Well... if you go down to the basement to the room off the freight elevator, commonly known as Room 7 or the Map Room, there are several green file cabinets that are full of file folders, and those are the vertical file folders. There are 3 different types of folders: Subject, Biography, and Author. These folders contain newspaper clippings, brochures, etc. for various Oregon subjects, etc.

She completed this task today, June 24, 2014. The total number of records that she input for each of the areas are as follows:

Subject – 2,741
 Biography – 948
 Author – 4,110
 TOTAL—7,779 records

Once again, what would we do without our student workers. We would either have to do it ourselves or not do it at all. In this case, this probably would have never been done.

THANK YOU KATE!!!

Deanne R. Smith
Oregon State Library

From: Robin Speer
Sent: Tuesday, June 24, 2014 4:31 PM
To: Jessica Rondema; AllStateLibrary
Subject: RE: 658.3142 Dewey Salute to Managers

That's for sure. Good work everyone!

Robin Speer

Volunteer Program Coordinator
http://www.oregon.gov/osl/Pages/Volunteer_Lib.aspx
 Talking Book and Braille Services Fund Development Coordinator

From: Katie Anderson
Sent: Tuesday, June 24, 2014 4:17 PM
To: Jessica Rondema; AllStateLibrary
Subject: RE: 658.3142 Dewey Salute to Managers

Sounds like great teamwork!

Katie Anderson, Library Development Services
 * Youth Services Consultant * Oregon Center for the Book Coordinator *

From: Jessica Rondema
Sent: Tuesday, June 24, 2014 4:16 PM
To: AllStateLibrary
Subject: 658.3142 Dewey Salute to Managers

Hi all,

I would like to give a Dewey salute to MaryKay, Susan, Margie, and Shawn for helping me with the Board meeting in Monroe on Friday. They always help, but this time was such a team effort! MaryKay handled catering supplies, Shawn drove the van, and all four helped with moving tables, cleaning the area, polycom issues, locking building, etc. And it's the only time I can tell the managers what to do! ;)

It really does take a village to pull off a successful Board meeting.

Thanks!
Jess

Jessica Rondema
Executive Assistant
Oregon State Library

From: Molly Carlisle
Sent: Tuesday, June 24, 2014 3:36 PM
To: Jessica Rondema
Subject: RE: "Bad Request" link in libs-or message

Thanks Jessica - I so appreciate the work you do with Jobline!

Molly Carlisle

-----Original Message-----

From: Jessica Rondema
Sent: Tuesday, June 24, 2014 2:10 PM
To: Jerry Curry; Molly Carlisle
Subject: RE: "Bad Request" link in libs-or message

Hi Molly,

Yes, I will use the link below in your job posting on the Jobline this Friday. Thanks for clarifying.

Thanks,
Jessica

Jessica Rondema
Executive Assistant
Oregon State Library

From: Hoffman, Jana
Sent: Friday, June 27, 2014 3:58 PM
To: Katie Anderson
Subject: RE: Ready to Read Road Show recap and what's next

Katie,
Thanks for all the time and energy you spend keeping us up to date on the proposed changes. I had planned to phone in to the session on June 11, and then had a last-minute schedule conflict with a required city meeting. I'm very happy to hear you'll be presenting it again at OLA, and appreciate the attached document.

Thanks again.
-Jana

From: Barratt Miller
Sent: Friday, June 27, 2014 3:27 PM
To: Katie Anderson
Subject: RE: Ready to Read Road Show recap and what's next

Hi Katie,

This is just to say thanks for being awesome. I really appreciate all of the work you do to make it easier for Oregon's youth services librarians to do our jobs. 😊

Thanks,
Barratt

From: Duncan Jeff B
Sent: Wednesday, June 25, 2014 1:35 PM
To: docdelivery
Subject: RE: Requested State Library Item Delivered

You people are a fantastic resource.

Thank you very much.

From: Christopher Claire
Sent: Monday, June 30, 2014 3:14 PM
To: Margie Harrison
Cc: Sara Belousek; Andrea Blake; Sarah Cunningham; Jerry Curry; Dave Hegeman; Angela Jannelli; Alice Laviolette; Alice Laviolette; Kate McGann; Eugene Newbill; Robby Pietz; Heather Pitts; Deanne Smith; Michael Thommen; Jey Wann
Subject: Thanks_for_your_efforts

Margie,

I needed to write a short note and provide highly positive feedback for the state library concerning the power and functionality of the online Order, Borrow, Loan and other literature services. I work at a field office and obtaining current and historical information from journals and reports on natural resource science is often difficult although severely needed for implementation of defensible management/restoration/education of the public. It is common for me to utilize the online library services weekly or biweekly. Your staff provides service that is..... from my experience with both University Libraries and another states' library system..... dependable and in a reasonable time period, often much faster than would be expected. Finding obscure literature is regularly very difficult and time consuming. I wanted to provide a solid thank you for the efforts of your staff and strong support for this program..

Thanks,

Chris

Christopher W. Claire

Habitat Protection Biologist
Oregon Dept. of Fish and Wildlife
Charleston, OR 97420

From: Margie Harrison
Sent: Friday, July 11, 2014 4:19 PM
To: Jessica Rondema; allGRS
Subject: FW: Hood River Production Master Plan

Great work!

Thanks,
Margie

From: Jey Wann
Sent: Friday, July 11, 2014 3:56 PM
To: allGRS
Subject: FW: Hood River Production Master Plan

Kudos to Heather, who (I think) found the document for him, Michael for scanning it, and Angie for putting it in the Repository.

From: Philip C Simpson
Sent: Friday, July 11, 2014 3:15 PM
To: Jey Wann
Subject: RE: Hood River Production Master Plan

That is awesome! Thanks so much!

Phil Simpson
Program Leader
Hood River Research Program
Oregon Department of Fish and Wildlife
The Dalles Screen Shop

From: Jey Wann
Sent: Friday, July 11, 2014 2:10 PM
Subject: Hood River Production Master Plan

We've digitized the Hood River documents you were looking at recently. It's available in the Oregon Documents Repository, <http://library.state.or.us/repository/2014/201407111302375/>

-Jey

Jey Wann
Oregon Documents Coordinator
Oregon State Library

From: Darci Hanning
Sent: Tuesday, July 15, 2014 4:57 PM
To: Crystal Grimes; AllStateLibrary
Subject: RE: Pet Supply Drive Wrap-Up

Kudos to all the folks that organized this and to everyone who participated – great job!

 Darci Hanning * Technology Development Consultant * Library Development Services
 Oregon State Library, 250 Winter St. NE, Salem, OR 97301

From: Jessica Rondema
Sent: Tuesday, July 15, 2014 4:56 PM
To: Crystal Grimes; AllStateLibrary
Subject: RE: Pet Supply Drive Wrap-Up

Great job, Charitable Activities Committee! I hope you do the drive again!

Jessica Rondema
 Executive Assistant
 Oregon State Library

From: Crystal Grimes
Sent: Tuesday, July 15, 2014 4:50 PM
To: AllStateLibrary
Subject: Pet Supply Drive Wrap-Up

Hello Everyone!

Thank you all so much for participating in our very first Pet Supply Drive!



Also thank you to everyone who submitted captions for the pet caption contest:

- Andrea C.
- Ann
- Arlene
- Brandon
- Chris
- Heather
- Jen
- Jess
- Jey
- Joel
- Katie
- Renata
- Robin

- Shawn

We had so many great entries it was hard to choose who would be in the final five. Attached to this email is a complete list of all the entries so that you can see all the great ones that we received.

We collected a grand total of \$130 in cash donations and a whole book cart of supplies!



I am sure the humane society will be very happy to receive these donations! Attached to this email is the PowerPoint of the finalists in the caption contest in case you didn't get to see it before the All Staff began.

Thank you all again!

Have a great day and try to stay cool out there!

Your Charitable Activities Committee:

Arlene – LD

Jen – LD

Susan – TBABS/LD

Deanne – GRS

Sara – GRS

Robin – LAS

Crystal – TBABS

Crystal Grimes
Circulation Technician
Talking Book and Braille Services
Oregon State Library

Sent: Tuesday, July 29, 2014 11:16 AM
To: HELP LEG
Subject: Re: Question on Audio/Videos Available and Testimony Archives

Mr. Jerry Curry,

Thank you so much! I truly appreciate all the help you have provided, this is exactly what I was looking for.

Again, I am astounded by the amazing service I received and how helpful you were.

Sincerely,

From: Linda Weight
Sent: Wednesday, July 30, 2014 5:28 PM
To: Darci Hanning
Subject: Yea, and thank you

Hi Darci

Thank you to you and everyone else at the State Library who have anything to do with renewing the LYRASIS membership. The discounts and free shipping from library supply vendors available under the LYRASIS membership really add up for us and every penny counts these days!

Also, I have taken some of their free to members webinars and they are quite good. It is great having this as another resource for information and training.

Thanks for letting us know.

Linda Weight
Librarian I
Siuslaw Public Library District

From: Sandra
Sent: Thursday, July 31, 2014 6:24 PM
To: Alice Laviolette
Subject: Re: Another photo of Stallings bros

You are unbelievable! Thank you so much!
Sandy Allen

Sent from my iPad

From: Joel Henderson
Sent: Friday, August 01, 2014 10:30 AM
To: AllStateLibrary
Subject: RE: Newsletter Labeling Y'All Come

A BIG thank you to everyone who helped out, including: Jey, Margie, Susan, Deanne, Kate, Ann, Katie, Ferol, Andrea, Robin, Jess, and Sara! We got everything done in less than 1 hour! Thanks as well to Glen Hansard, The Black Keys, Of Monsters and Men, Daft Punk, and the Lego Movie for providing music for the event, and Safeway for generously baking donuts.

There are extra refreshments in Talking Books, so please swing by and partake! Happy Friday!

Joel Henderson
Talking Books
Oregon State Library

From: Kate McGann
Sent: Monday, August 04, 2014 11:24 AM
To: Shawn Range; Robin Speer; AllStateLibrary
Subject: RE: Good facilitation

Yes Chris and Katie did a wonderful job .. thanks so much.

Kate

From: Shawn Range
Sent: Monday, August 04, 2014 10:57 AM
To: Robin Speer; AllStateLibrary
Subject: RE: Good facilitation

I second that. A big Dewey Salute to you.

Shawn Range
Oregon State Library
Business Manager

From: Robin Speer
Sent: Monday, August 04, 2014 10:53 AM
To: AllStateLibrary
Subject: Good facilitation

I would like to thank Chris Adams and Katie Anderson for facilitating a challenging subject with style and professionalism. We had a lively discussion for 1.5 hours and I learned several new things. Thank you to Chris and Katie and to everyone who attended!

Robin Speer

Volunteer Program Coordinator

http://www.oregon.gov/osl/Pages/Volunteer_Lib.aspx

Oregon Talking Book and Braille Library Fund Development Coordinator

Oregon State Library

Talking Books + Braille Services
 OREGON STATE LIBRARY
 250 Winter St. NE.
 Salem, OR
 97301-3950

Thank you for provid-
 ing my husband, Herman
 F. Smith, with hours
 & hours of entertain-
 ment over the past 12
 years. The privilege
 of browsing in the literary
 world was a life saver.

And your service
 was always prompt and

gracious.

Sincerely,

Ramona Smith

End.: \$100.00

Tender Thoughts

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 ©MAG, LLC

Hi Robin,
You wrote a



A heartfelt *Thanks*
for all you have done.

Great letter!

Thanks again,

Judy Clement

Judy Clement was interviewed and the letter written from her life experiences, for the 2014 Spring Appeal.

Judy Clement
Talking Book Patron

April 16, 2014

«preferred_constituent_name»
«address1» «address2»
«city», «state» «zip_code»

Dear «preferred_salutation»,

I play the ukulele and sing songs from the 1940's. This has become my favorite activity next to listening to Talking Books. Throughout most of my life I have relied on Talking Books for education, inspiration, entertainment and learning.

I want to tell you my story and why I support the Talking Book and Braille Services program. And, I am asking you to send a gift. Your gift will help connect talking books with blind or print disabled Oregonians and help support the overall program.

When I was in my 20's, I was diagnosed with Multiple Sclerosis. My eyesight began to deteriorate. So, I began working with a vocational rehabilitation counselor who introduced me to the Talking Book and Braille Services program. While a student in college I used the student text books for the blind to complete my degree.

Back in the early days we used phonograph players and records to listen to the books. I was so glad to change to the cassette players and tapes. I was able to carry the player in my backpack so I could listen to books on my commute to work. Now, with the new digital player and down-

loadable books, I have great access to all kinds of books and publications (and a much more compact and light player to carry!)

My life was very busy with a career in family therapy, raising 3 children, jogging and swimming. Being physically active is a challenge for me now, so Talking Books is an important daily activity. My favorite books are novels, biographies and a bit of mysteries. One of my favorite parts of this service is that I can call in new titles anytime and often they arrive within days.

I want to share my story with people who are print disabled so that they can have a fun life, especially with the help of Talking Books. I just took up playing the ukulele six years ago and now am directing a group of beginners at the retirement community where I live. My life continues to be full with many hours of reading and learning every day.

I know you value this program because you have given generously in the past. Please consider sending a new financial gift to Talking Book and Braille Services. I will. I believe in this service and the positive effect it has on people's lives.

Your gift will help the program grow, reaching out to Oregonians who have never heard about Talking Books. Your gift will continue programs like NFB-Newsline where patrons listen to the latest news articles read over the phone, recordings of Oregon books and the purchasing of descriptive videos.

Here are several ways for you to send a financial gift and I encourage you to select what best fits your needs:

1. Website – Use the secure website to accept donations with your visa or master card. Go to www.givetotbabs.org
2. Automatic Payment – Contact your bank or credit union and have them set up an automatic monthly payment to Talking Book and Braille Services from your account.
3. Check – Send a check in the enclosed envelope.

Every day I enjoy my music, friends and family. And, talking books keeps my mind sharp as well as entertained. Thank you in advance for your gift. You are enriching the lives of people with the gift of reading.

Yours truly,



Judy Clement
Talking Book Patron

P. S. Your gift is always tax exemptible. And, here's a great website for direct donations by credit card (master card and visa) at www.givetotbabs.org

P. P. S. If you have questions or want to talk with someone at Talking Books, call 1 - 800 - 452 - 0292. Thanks again!
