

Senate Interim Task Force on Library Cooperation

- Final Report -

December, 2002

Introduction

On August 31, 2001, Senate President Gene Derfler announced the formation of the *Senate Interim Library Use Task Force*, later named the *Senate Interim Task Force on Library Cooperation*. The task force, chaired by Senator Cliff Trow, was made up of seven voting members and four non-voting members. Three of the task force members are current Oregon legislators, while the other eight are leaders in the Oregon library community.

Members of the task force include:

Voting Members:

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| Senator Cliff Trow, Chair | State Senator District 18 |
| Senator Ginny Burdick | State Senator District 6 |
| Senator Verne Duncan | State Senator District 12 |
| Aletha Bonebrake | Director, Baker County Library |
| Ginnie Cooper | Director, Multnomah County Library |
| Larry Oberg | Director, Hatfield Library, Willamette University |
| Deborah Carver | Director, Knight Library, University of Oregon |

Non-Voting Members:

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| Connie Bennett | Director, Eugene Public Library, 2002-03 President of the Oregon Library Association. |
| Karyle Butcher | Director, Valley Library, Oregon State University |
| Janet Webster | Director, Guin Library, OSU Hatfield Marine Science Center. 2001-02 President of the Oregon Library Association |
| Jim Scheppke | Oregon State Librarian |

In addition to the full task force, two subcommittees were also named. The Subcommittee on Solution Identification, chaired by Senator Verne Duncan, was asked to identify barriers that inhibit cross library cooperation and find potential solutions. The Subcommittee on Legislative Proposal Development, chaired by Senator Ginny Burdick, was asked to consider possible legislative proposals relating to the solutions found by Senator Duncan's subcommittee.

Aletha Bonebrake, Deborah Carver and Janet Webster served with Senator Duncan as voting members of the Sub-committee on Solution Identification. Connie Bennett, Karyle Butcher and Larry Oberg served with Senator Burdick as voting member of the Sub-committee on Legislative Proposal Development.

Direction of the Task Force

The task force was directed by the President to investigate ways that library cooperation can be increased to improve library services to all Oregonians. The investigation was to consider, among other ideas, the Oregon Library Association’s “Vision 2010 Call to Action,” the Oregon Library Services and Technology Act Plan 1998-2002, and the Connect Oregon (CORE) model.

Specifically, the task force was set up to:

- A) Review current structure, services and funding of Oregon libraries.
- B) Investigate existing statewide library cooperation models that result in equitable access by all Oregonians to existing library collections, services, electronic information and resources. Based on investigation, identify a possible Oregon option.
- C) Develop draft legislation that furthers the implementation of the Oregon option.

Task Force Process

The task force was given approval by Senate President Derfler to meet three times during the 2001-2002 Oregon legislative interim. The meetings took place on March 11, May 13 and October 21, 2002. Both the Subcommittee on Solution Identification and the Subcommittee on Legislative Proposal Development met independently during the afternoon of March 11th, immediately following the adjournment of the full task force. The Subcommittee on Legislative Proposal Development also met the morning of October 21st, prior to the scheduled full task force meeting. In addition to the scheduled meetings, the task force also held two informal conference calls so as to further discuss issues being considered by the task force.

During the course of task force meetings, the members heard testimony from:

| Name | Title | Topic of Discussion |
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| Jim Scheppke | State Librarian | Reviewed the current status of libraries in Oregon, reviewed the funding and allocation of financial resources of the Oregon State Library, reported on the state of school library statistics, and reviewed TexShare and other state models on library cooperation and compared these models to existing Oregon models. |
| Patricia Cutright | Director of Pierce Library, Eastern Oregon University | Gave an overview of Senate Bill 202, also known as CORE – Connect Oregon, which was considered during the 2001 regular legislative session. Ms. Cutright also testified on the role of public schools as part of a statewide catalog system |

**Senate Task Force on Library Cooperation
Final Report**

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| Janet Webster | Director, Guin Library, OSU Hatfield Marine Science Center, President of the Oregon Library Association, 2001-02. | Gave an overview of Vision 2010, a document developed by the Oregon Library Association. |
| Mary Ginnane | Director, Library Development, Oregon State Library | Reviewed the Oregon Library Services and Technology Act Plan. |
| Linda Cochran | President, Oregon Community College Library Association | Reviewed libraries within the community college system |
| Kate Dickson | Deputy Superintendent of Public Instruction | Reviewed Oregon Department of Education's relationship with public school libraries. |
| John Helmer | Director, Orbis Library Consortium | Reviewed organizational structure, funding and allocation of the Orbis Library Consortium. |
| Susan Whyte Ann Payne | PORTALS Chair PORTALS Program Administrator | Reviewed organizational structure, funding and allocation of PORTALS (Portland Area Library System) Library Consortium |
| Deborah Carver | Acting Director, Knight Library, University of Oregon | Reviewed Vision 2010 phase-in plan that was developed by the task force members during the April 15, 2002 conference call. |
| Larry Oberg | Director, Mark O. Hatfield Library, Willamette University | Reviewed informal survey of private academic libraries and their interest in a statewide consortium. |
| Tom Potiowsky Michael Kennedy | State Economist, Revenue Economist, Budget and Management Division, Department of Administrative Services | Provided update on Oregon revenue projections |

Task Force Priorities:

The analysis and documentation presented by those testifying before the task force formed the basis of much of the task force discussion. From this, a list of the top priorities relating to library cooperation was identified.

The task force identified, in no particular order, the following priorities:

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| PRIORITY: | Statewide coordination for purchasing databases for Oregon libraries. Of all the priorities, this was designated as the HIGHEST PRIORITY. |
| BENEFIT: | Provides for a centralized, equitable, coordinated effort in the purchase and distribution of electronic databases to all Oregon libraries. Statewide coordination in the purchase of databases will ensure that all Oregonians, regardless of age or needs, will have access to basic electronic resources such as the NewsBank <i>Oregonian</i> database and the EBSCO periodicals databases. |

**Senate Task Force on Library Cooperation
Final Report**

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| <p>PRIORITY: Oregon State Library will become the host and fiscal agent for a new consortium organization charged with coordinating statewide services for Oregon libraries.</p> <p>BENEFIT: Provides for a single point, coordinated effort, both financially and from an infrastructure standpoint, in the development and management of statewide library services.</p> |
| <p>PRIORITY: Reallocate and enhance state resources to Oregon State Library for the purpose of facilitating access to electronic resources to Oregon libraries. For example, statewide databases, coordinating statewide services, etc.</p> <p>BENEFIT: Provides for a centralized, equitable, coordinated effort in the purchase and distribution of electronic databases, the setup and execution of a statewide catalogue system, the establishment of a statewide library card and other statewide electronic services to all Oregon libraries. This will make certain that all Oregonians have access to basic databases, access to the collections of all publicly funded libraries through a single access point, and the ability to check out materials from any publicly funded library.</p> |
| <p>PRIORITY: Review the Net Lender Reimbursement Program.</p> <p>BENEFIT: Determine if Net Lender Reimbursement Program funds are the best utilization of limited (Library Services and Technology Act Plan) LSTA dollars.</p> |
| <p>PRIORITY: Create incentives to encourage small and rural libraries to utilize the State of Oregon Enterprise Network (SOEN).</p> <p>BENEFIT: Small and rural libraries will achieve lower costs and improved quality in their telecommunications by using SOEN.</p> |
| <p>PRIORITY: In cooperation with Orbis and other interested organizations, Oregon State Library will take the lead in creating the critical courier infrastructure.</p> <p>BENEFIT: Provides a statewide courier services that increases courier efficiencies and effectiveness by streamlining the process, and reaching remote, rural libraries. Ensures that all Oregonians have the ability to check out materials that make up all publicly funded library collections.</p> |
| <p>PRIORITY: Encourage community colleges, or groups of community colleges, to apply for LSTA grants to become members of Orbis.</p> <p>BENEFIT: Community Colleges will have access to all services provided by Orbis.</p> |
| <p>PRIORITY: Recommend a council that is accountable to the Oregon State Library Board of Trustees. The Council would be responsible for being the liaison between communities of interests and the Oregon State Library Board.</p> <p>BENEFIT: Provides a steering committee for statewide services of the State Library such as database licensing.</p> |

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| PRIORITY: Support statistics legislation coming from the Oregon State Library Board. |
| BENEFIT: Provides for adequate statistics reporting on school libraries within the State of Oregon. |
| PRIORITY: Support the state funding of the Quality Education Model as it relates to school libraries. |
| BENEFIT: Proper funding will provide for full time librarians within each school. |

Task Force Legislative Proposal and Recommendations

Based on committee discussions, financial resource limitations and the consideration of the identified top library cooperation priorities, the task force suggested, as their principal recommendation, the introduction of LC 1057 (Exhibit A).

LC 1057

LC 1057, which is a proposed amendment to ORS 357.206, will:

- ◆ Eliminate the Net Lender Reimbursement program, currently administered by the Oregon State Library. The Net Lender Reimbursement program provides federal dollars to “net lender” libraries. Net lender libraries are those which loan more library materials to other Oregon libraries than they borrow.
- ◆ Authorize a new program, to be administered by the Oregon State Library that will provide grants and other assistance to all types of libraries for the statewide licensing of electronic databases.
- ◆ Authorize a new program, to be administered by the Oregon State Library that provides grants and other assistance for statewide courier delivery of library materials.
- ◆ Specify that libraries that provide reference services, in connection with a statewide cooperative e-reference services project, are eligible for reimbursements from the state.
- ◆ Require that Oregon libraries that benefit from these programs must continue to make interlibrary loans to other Oregon libraries without change.
- ◆ Become effective July 1, 2003

The task force unanimously approved at their October 21st meeting that LC 1057 be sent to the Senate Interim Committee on General Government, chaired by Senator Verne Duncan, with the recommendation that the committee approve it for pre-session filing. This recommendation was considered and approved by the task force; LC 1057 was delivered to the Secretary of the Senate for pre-session filing. It was assigned bill number SB12.

Background on LC 1057 (SB 12)

LC 1057 (SB 12) was developed based on both what the task force perceived as the current value to Oregon libraries of the Net Lender Reimbursement Program, as well as the overall need for statewide coordination in the purchase of electronic databases for Oregon’s libraries.

The net lender reimbursement program was developed in the early 1990s, and was designed to balance, across all libraries, the financial impact of interlibrary loans of books and other materials. Funding for the program comes from federal LSTA (Library Services and Technology Act) funds, and is in the amount of approximately \$800,000 per biennium.

Through the net lender program, academic and public libraries receive reimbursement for net loans transacted through automated resource sharing systems (called consortial loans) and those that are not (called non-consortial loans). Consortial net loans are reimbursed at \$1 each and non-consortial loans at \$4 each. During the evaluation of the net lender program, it was argued that consortial borrowing, which comprised 84% of the reimbursed loans in 2001-02, will continue to grow with or without the net lender reimbursement program in place. It was pointed out that libraries participated in the loaning of materials well before the net lender program began, and that they will continue to loan materials even if the program is discontinued. It was also argued that the non-consortial rate may not be good public policy because of the greater incentive for libraries not to utilize automated resource sharing systems. An example was given of the recent decision by the Klamath County Library to withdraw from the Southern Oregon Library Information System (SOLIS) for, among other reasons, their desire to receive the higher \$4 compensation rate for the loans they provide to other libraries in Southern Oregon.

Finally, it was believed by some on the task force that the current net lender program may not be sustainable. It was noted that interlibrary lending in Oregon has grown from 800,000 when the program began to 1.7 million in 2000-01. The growth is expected to continue, partly because of the growth and development of library consortia in the state. The fear expressed was that the net lender program, the second largest recipient of LSTA funds, will likely increase funding requirements and thus consume more of the limited LSTA funds over the coming years.

For these reasons, and for the task force's desire to address their highest identified priority of developing statewide coordination in purchasing electronic databases, the task force recommended that the current \$800,000 in LSTA funds targeted towards the net lender program be re-allocated to a statewide licensing of electronic databases program. The vehicle used by the task force to move this recommendation forward is LC 1057 (SB 12).

Letter to the Quality Education Commission

In addition to LC 1057, the task force also requested that a letter be sent, under Senator Trow's signature, to Mr. Ken Thrasher, Chair of the Quality Education Commission, to express the task force's concern over the Quality Education Model's failure to address the importance of certified school librarians in Oregon's elementary schools (Exhibit B).

Since 1982, the number of certified elementary school librarians has dropped from one librarian for every 547 students to one librarian for every 891 students. Budgets for books and other library materials have also been greatly reduced.

The task force requested the Quality Education Commission take a serious look at the need for certified school librarians in every elementary school. They suggested that Mr. Thrasher and the Commission review a recent study by Dr. Keith Curry Lance, of the Colorado Department of

Senate Task Force on Library Cooperation Final Report

Education, titled *Good Schools have School Librarians* (2001). Dr Lance surveyed school libraries in Oregon and compared the quality of the school libraries to state reading test results for grades 5, 8 and 10. He found that the reading test scores were higher in schools with a quality school library media program.

The task force also asked that the Commission consult with Dr. Steve Wisely, Superintendent of the Medford School District. Dr. Wisely was asked by First Lady Laura Bush to address the first White House Conference on School Libraries in recognition of his support for some of the best school libraries in Oregon in his district. Dr. Wisely shared his experiences with the conference and pointed out that school libraries need to be the “hub of the school.” Dr. Wisely confirmed the results of Dr. Lance’s study that quality school libraries led to higher student achievement.

Mr. Thrasher responded to the letter by thanking Senator Trow for taking the time to express the concerns of the task force. Mr. Thrasher suggested that the Quality Education commission will resume their meetings in March 2003, and is confident that the Commission will have an interest in the topic. He encouraged Senator Trow and the task force to put together a presentation for the Commission’s consideration at that time.

Adjournment

Senator Trow expressed his thanks and appreciation to all task force members for their participation on the committee. He also publicly thanked Senate President Derfler for providing the task force the opportunity to study library issues within the State of Oregon, and make recommendations that positively impact Oregon’s library community. Senator Trow adjourned the final meeting of the Senate Interim Task Force on Library Cooperation on Monday, October 21, 2002.