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## Thirty years of union listing in Oregon - Reflections on ORULS and its predecessors

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

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## Thirty Years of Union Listing in Oregon

—Reflections on ORULS and its Predecessors

by *Deanna Iltis*,  
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### GETTING STARTED

Partnership was certainly on the agenda when three Oregon State System of Higher Education (OSSHE) libraries formed the Portland Area Automation Committee in 1966. The group consisted of the University of Oregon Medical School, Dental School, and Portland State University. The committee was "initially formed as a discussion group to plan for an eventual online serials

check-in system to be shared by the three Portland libraries of OSSHE. Subsequent meetings were concerned almost exclusively with grant applications for union listing" (Abrams, 1983). With a Public Health Service Medical Library Assistance Act grant for FY1966/67, the union list project began. Because of its computer capabilities, the Medical School initially hosted the project, and by 1968 the union list contained over 10,000 holdings.

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

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

ciation of Portland, Oregon Historical Society, and Oregon Regional Primate Research Center.

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

### GROWTH AND DEVELOPMENT

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

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

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

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

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

#### ONLINE REVOLUTION

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

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

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

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

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

#### CHANGING TIMES, CHANGING FUNDING

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

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

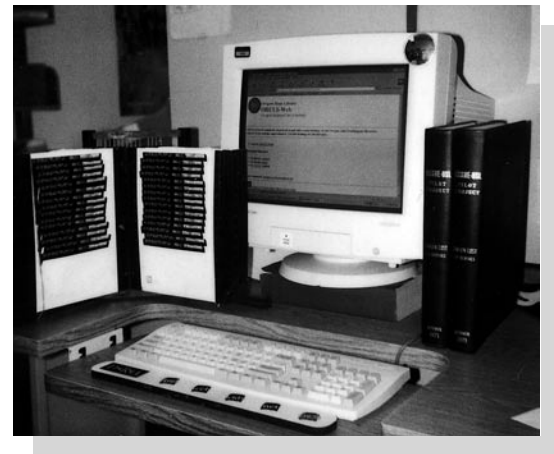
With the advice and support of the Advisory Council, the ORULS Project began a transition to self-supporting status when LSCA funding ended in 1988. By the time the 8th ORULS microfiche edition appeared in 1990, a biennial subscription structure was in place. Subscription fees were set on a sliding scale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

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

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

*See Thirty Years page 13*

ORULS through the years



## Partners in Access *(continued from page )*

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

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

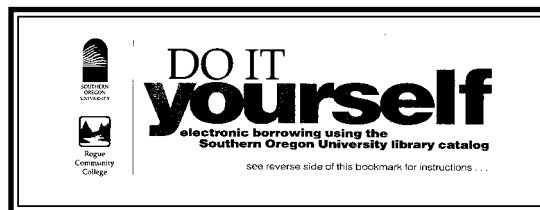
The joint Southern Oregon University Library and Rogue Community College Library Materials Delivery Workgroup collaboration worked well since all members readily saw the potential benefits in creating this type of request/delivery system for their students. This ability to work well as a team did not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

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

Although SOU students are not yet able to access RCC libraries' collections online, with RCC's migration to a new library automation system, this is a future possibility. The partnering between SOU and RCC libraries currently exists in several additional areas. Along with pick-up and return of library materials at RCC sites in Medford and Grants Pass, SOU students may use resources

within these libraries. This cooperative, collegial attitude will work toward providing accessible library resources to SOU students as well as RCC students, many of whom will matriculate into the University's baccalaureate programs.

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



## Thirty Years *(continued from page )*

### TRUE PARTNERSHIP

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

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

### THE PRESENT, THE FUTURE

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

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

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

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