



## **Oregon Library Passport Program: How did we get here?**

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Good morning. I am honored to talk to you today about the Oregon Library Passport Program. I think I could probably say everything I need to say in under 5 minutes, so with Your indulgence I'll take a bigger picture view about resource sharing in libraries And try to put Passport into a larger context.

Who am I? As Margaret noted..

Director of Washington County Cooperative Library Services,

A consortium of libraries west of Portland

You're in Washington County now....

I've been a librarian for 31 years

Career based on sharing resources between libraries

Served as Chair of the Oregon Library Association Resource Sharing Committee that

Devised the Passport Program which launched in 2013.

## The Passport Program Basics



- Any public or academic library can participate
- Your patron shows your card at any other Passport library and can get one of that library's cards for free
- Limits on use may apply (set by destination)
- Patron responsible for checkouts and returns
- It's that simple
- <http://librariesoforegon.org/passport>

First, the basics:

Passport started in 2013 as a 3 year "pilot" project, but is now on-going.

I never thought of it as a pilot because I knew it would succeed.

But letting others come to their own conclusions is OK, too.

How does a library participate?

Just say Yes and you are in! Any public or academic library may participate.

You set limits on how your collection is used – # of checkouts, no ILLs or whatever

You set the parameters that fit your comfort level.

Your patron goes to another participating library, shows his card, gets a new card at

That Library and is good to go! There is no card fee.

Patrons are responsible for checking out and returning materials and paying any fines –

Your library is not responsible or involved in the transactions.

Unlike traditional ILL, This is a patron directed activity for patrons of legally established libraries.

## Why would a library participate?



- Vastly expand resources you can offer your patrons (great marketing!)
- Access to most libraries in the state
- Access to cool stuff and cool collections your library doesn't have
- It costs your library nothing (no fees, staff time, or shipping costs)
- Why wouldn't you participate?

Why would you let "another library's patrons use your library?"

The premise of the Passport program is this:

Library service ought to mirror the way Oregonians live, work, shop, and play.

And that doesn't follow arbitrary geopolitical boundaries. For example,

Portland, Lake Oswego, Tualatin and Wilsonville cross county lines.

Trivia: There are 1550 people who live in the City of Wilsonville and Washington County. 1500 of them are residents of Coffee Creek Correctional institution!

Lake Oswego and Portland are in three counties.

About 20% of Tualatin is in Clackamas County.

The reality is that many people live in one place and work in another –

Different cities, counties, or even states.

Students may commute to college in another city or county.

By participating in Passport, you vastly expand the resources you can offer your Patrons – great marketing!

Passport opens access to most libraries in the state (not all) and provides access

To Cool stuff your library might not have, for example medical libraries, special collections, different choices of DVDs, large print, CDs, etc.

Participation costs you nothing – so you greatly expand resources for no additional

Cost – that usually plays well with your local parent government agencies and taxpayers!

Why wouldn't you participate?

## Initial Concerns Raised



- Other libraries' patrons will take our books and not return them
- Our shelves will be bare
- Our library is a *HAVE*, but our neighbor library is a *HAVE NOT* – we don't want to share
- Our patrons won't need us anymore
- Our Council won't go for it, or
- They'll cut our budget if patrons can go elsewhere

Letting other libraries' patrons use your library isn't always a common thing. When we mapped out the Passport program some libraries raised concerns and questions. That's why we did a pilot – to see if they were real or imagined.

Concerns about loss of materials, or there might be a run on your collection.  
Concern about neighboring libraries – we're a have and they are a have not.  
Concern that local patrons would switch to the "better" library down the road.  
Concern that local city councils wouldn't go for it (for any number of reasons above) or that councils would see it as a reason to cut local funding – We can save money  
And just tell 'em to go elsewhere!

These can all be summarized as FEAR of the unknown or fear of taking a bold move or maybe just a bit of arrogance.

I think legitimate reasons for not participating might include distance and geographic isolation. For example, residents of Jackson County would have a long way to drive to find another Passport Library. The likelihood that it would be a local benefit is reduced. And yet, many Eastern Oregon libraries are Members. So, it's up to you!

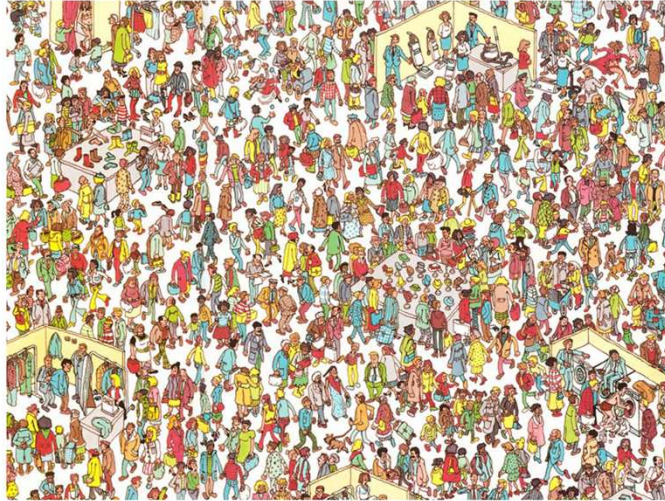
Libraries were expecting this:



Here's what some libraries were fearing

Instead of, "What's in your wallet?" maybe they're shouting "What's in your bookdrop?"

But it was more like this:



But in reality, finding a Passport user at your library might be more like finding Waldo. The number of Passport users is relatively small, but they are happy lot!

## What Really Happened



- Libraries continue to sign on as participants
- Circulation to Passport patrons is a small subset of regular circulation
- Passport patrons are no less responsible than my own patrons
- My patrons can use libraries wherever and whenever they want

Some libraries that did not participate in the beginning have now signed on – libraries continue to join. The participation form is on the website.

Circulation to Passport patrons is a small subset of regular circulation.

EX: WCCLS is one of the larger Passport members – 340 registered patrons.

That's out of 268,000+ total patrons.

We had over 15,000 checkouts last year to OLPP (out of about 13 million circ)

You might be doing the math and thinking that's a high circ per capita, but it's still a small %% of our total circ.

We have not noticed that Passport patrons are any less responsible than our own, but if Materials are lost we refer them to the collection agency like our own patrons.

You might say that WCCLS patrons already have great library service with access to over 1.6 million items. Why would they want to use another library?

What are the cool things that Passport offers for my folks?

Access to Portland State University and OHSU libraries, and in two words:

**beach libraries! Or beach movies!**

## Passport Library Comments



- “Passport cardholders feel that this is how things *should* work naturally, that there *should* be statewide access” -- Astoria
- “Patrons very happy to come in while on vacation” -- Newport
- “Awesome opportunity to serve under-served residents to the south” -- Wilsonville
- “We like being connected to the community in a positive way” – Portland State Univ.

During the Pilot period there were annual surveys and here are some comments from the most recent one:

Astoria

Newport

Wilsonville

PSU – has the highest reported number of Passport patrons in the most recent survey, mostly local

High school students who are using the library for school work. Awesome.

I would like to acknowledge the other members of the Resource Sharing Committee who Helped shepherd in the Program:

John Hunter, Woodburn

Buzzy Nielsen, Hood River

Ed Gallagher, Albany

Jane Tucker, Astoria

Robin Shapiro, Portland Community College

Dan White, Scappoose

Steve Skidmore, Siuslaw



## So, how did we get here?

“The Dream of a  
Statewide Catalog” -- *State  
Librarian Jim Schepcke*

Together our libraries will  
extend library services to  
all Oregonians, at home  
and around the state.” –  
*OLA Vision 2020*



That's all well and good, but the Resource Sharing committee didn't just wake up one day and say, "Ahha! Passport!" Let's just loan stuff!

Passport is the most recent manifestation of a long tradition of library resource sharing. So why now?

A Short answer: Retiring State Librarian wanted a statewide library card and this was the best we could do before he retired!

Long answer:

Together our libraries will extend library services to all Oregonians,  
At home and around the state. OLAQ, *Summer 2011 Vision 2020*

Oregon Library Association Vision statements which are written every decade  
Have for many versions included aspirations to provide improved Statewide access  
to libraries in some manner –

universal card, or universal access in some form. Vision 2020 also included a desire  
For a level of library access beyond traditional Interlibrary Loan.

All of this is based on a long commitment to resource sharing in Oregon and the  
Pacific Northwest. You can't understand why Passport seems natural unless you  
understand and appreciate the past efforts of libraries to share resources.

*Set your time machine...*



Check your flux capacitor and let's take a look back at the development of resource Sharing.

I'll touch on a few things, but this is in no way is an exhaustive list of the efforts to share resources between libraries.

## THE WEST: THINGS ARE DIFFERENT HERE...

- Pacific Northwest Bibliographic Center established at Univ. of Washington in 1940
- Goal: Create a Regional Union Catalog
- *“...view that each library holds its books in trust for the region as a whole, the libraries of the Pacific Northwest lend each other books for all kinds and conditions of clients, for any purpose and for any length of time within reason.”*

My first library job began in 1980 as a student worker for PNBC at the University of Washington. This is where I had my first Introduction to libraries, and my resource sharing education began with this as the backdrop.

PNBC was funded primarily by the Washington State Library, and participating States and provinces. It aligned mostly with the Pacific Northwest Library Association (PNLA) territory. It created a union catalog of library holdings for the region.

PNBC operated from 1940 until the early 1980's serving as a clearinghouse for locating ILLs for libraries in 5 US states and two Canadian provinces. Libraries mailed ILL requests to PNBC and staff would Verify the citations and identify likely lending libraries via the NUC, the university catalog, various PNBC Created tools like the regional catalog, and later on through WLN and OCLC computer catalogs. Students like me, trudged across campus To retrieve books and photocopy articles, we mailed ILL forms off to other libraries across the Country and used Telex and FAX machines to send requests. We were SO cutting edge!

I think this statement from the PNBC founding documents is pretty amazing – “each library holds its books in trust for the region as a whole.” That was written in 1942. I think the WWII mindset, we're all in this together, united we stand, we have scarce Resources so we need to share, and so forth Underpinned the framework. It's also a very “western pioneer” spirit.

# National Union Catalog



On a bigger scale:

Broad use of InterLibrary Loan spread with the publication of The National Union Catalog, pre-1956 imprints;. This was a cumulative author list representing Library of Congress printed cards and titles reported by other American libraries. It was compiled and edited with the cooperation of the Library of Congress and the National Union Catalog Subcommittee of the Resources Committee of the Resources and Technical Services Division, American Library Association. It was published in London, by Mansell company, between 1968-1981.

It took 14 years to complete.

754 oversized volumes

528,000 pages

130 shelf feet and

weighed 3 tons.

The Pages were photocopies of library cards with NUC symbols for owning libraries stamped in tiny letters Across the bottom of the cards.

How many of you have ever seen or used the NUC?

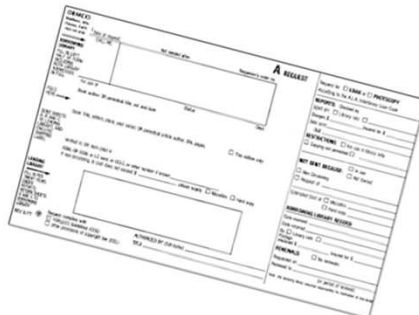
Wikipedia: "In an effort to simplify research, it was decided in the 1960's to collect and publish all of the References to pre-1956 imprints in a single alphabetical listing."

Well, all the references at the Library of Congress, so a very "Western" perspective, But still a lot of stuff!

The Back Story: libraries mailed their shelf lists to LC. PNBC mailed its Union Catalog to LC so there Was strong northwest library representation. LC stamped all the library codes on one set of shelf list cards, then drove shipments of shelf list cards to National Airport and they were flown to London Overnight where they were photographed by Mansell Company and then flown back to LC. The reason Mansell got the contract is that they had created a similar catalog for the British Museum.

This is what libraries did before computers! Research libraries around the country then Purchased copies of the set and used them to look up locations for interlibrary loans. For the first time libraries had a roadmap to find materials across the country.

## Relying on the Kindness of Strangers...



Once you found a likely lender you typed up an ILL form and mailed it to the library. This can be referred to as, “relying on the kindness of strangers to satisfy your patron’s requests.”

It took weeks or months to get an ILL and it had to be “for research purposes only.”

If the first library said NO, you went on to the next until you found a lender.

This was serious business! No frivolous requests just to satisfy curiosity! No pleasure Reading!

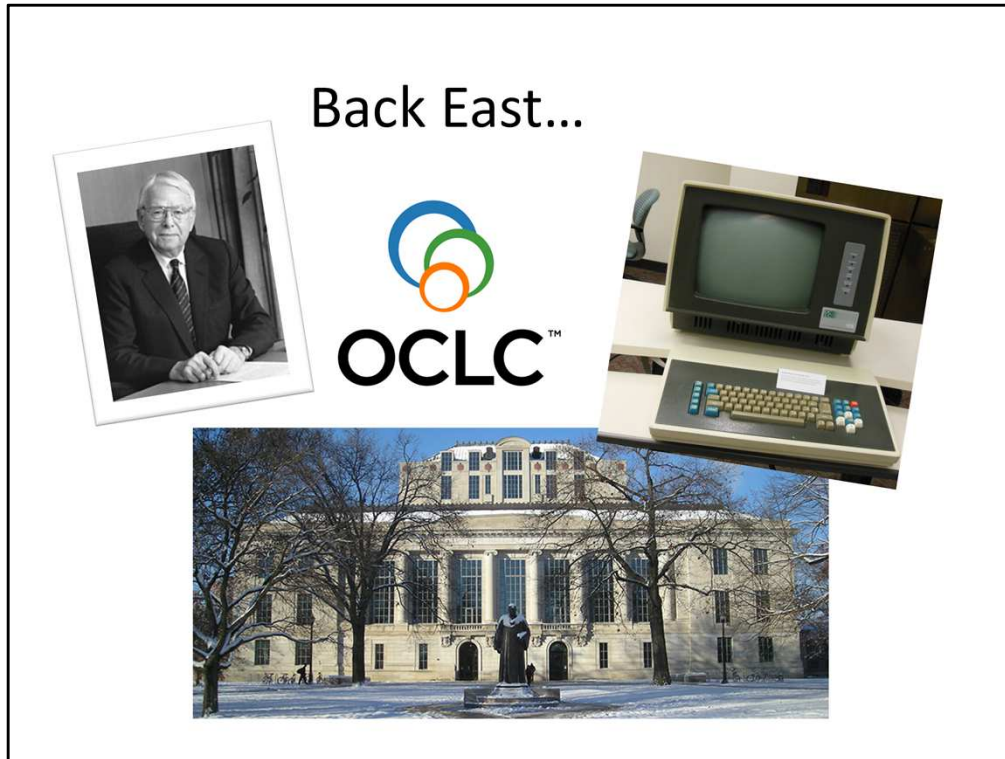
These were all library-to-library mediated transactions on behalf of patrons.

It was very staff intensive, costly and time-consuming.

And yet, this was a major leap forward in locating and borrowing materials.

At least you knew that at one time a certain library owned that title.





Enter the computer....

The **Online Computer Library Center, Inc. (OCLC)** is "a nonprofit, membership, computer library service and research organization dedicated to the public purposes of furthering access to the world's information and reducing information costs".<sup>[2]</sup>

It was founded in 1967 as the **Ohio College Library Center**. OCLC and its member libraries cooperatively produce and maintain [WorldCat](#), the largest [online public access catalog](#) in the world. It started as a group effort of Ohio college libraries to share Cataloging and facilitate inter-institutional lending.

Fred Kilgour is considered the Father of OCLC.

I'm sure most of you are familiar with OCLC in some capacity.

My first professional position after graduate school was as the Head of Interlibrary Loan for the Ohio State University Libraries, the place where some 18 years earlier, Fred Kilgour created the first OCLC records. My career in resource sharing continued. While there I worked to create reciprocal lending agreements with other Ohio libraries, the Big 10 libraries and academic libraries across the country with which we had similar Borrowing and lending patterns.

The bottom photo is of the Thompson Library at OSU – I chose a photo with snow Because COLD is one of my most vivid memories of living in Ohio!

## WL WHAT?



At almost a parallel timeline to the development of OCLC, the Washington State Library began development of WLN. It Originally stood for Washington Library Network, And later became the Western Library Network. It was a cooperative Arrangement of WA libraries for resource sharing formed in the 1970's.

This wasn't so much relying on the "kindness of Strangers, as relying on the kindness of neighbors." There was a group commitment to sharing.

WLN created a computer catalog in 1977 programmed by Boeing Computer Services! (It took aeronautical engineers?)

The catalog facilitated ILLs between members. WLN also generated printed catalog cards for libraries and later provided Services like authority control and MARC record conversions. Member libraries contributed original cataloging Records and attributed their holdings to shared records forming an OPAC, similar to OCLC.

I couldn't find a photo of an actual WLN terminal, but this is of the era. Think beige and Clunky.

For some years there was the idea that OCLC would serve part of the US, WLN would serve part, And then there was another group called RLG (Research Libraries Group) that was for "serious research Libraries" back East including Harvard, Yale, and New York Public Libraries. Market forces being what they are, WLN eventually was consumed by OCLC in the late 1990's And RLG was swallowed in 2006.



## THE OREGON TRAIL



Much like the pioneering spirit that brought settlers to the Oregon territory, Oregon libraries maintain a sense of shared Responsibility and shared commitment. We don't leave a wagon behind! You share what you have because someday you may Need To rely on the kindness of neighbors or strangers. And mirroring the goals of PNBC I think many, but probably not all, libraries believe that our books are held in trust for all Oregonians to use.

Over the years, Multiple Oregon Library Association Vision documents have talked about creating a statewide library card, or a statewide Catalog and sharing resources across jurisdictions, and between all types of libraries.

Unfortunately, local practice and politics and usually scarce library funding always seems to get in the way. The State Library created an OPAC in the early 1980's called the Oregon Public Access Catalog to facilitate access to the State Library's collection. I moved from Ohio to Oregon to be the head of Access Services at the State Library and one of my jobs was to go Around the state and teach library staff how to dial into the state library's OPAC.

## MIX and ORBIS: regional efforts



On a regional scale:

In addition to state, multi-state, national and international efforts,  
Resource sharing efforts in Oregon serve regions of the state or types of libraries.

MIX – Metropolitan Interlibrary Exchange began in 1985 between Washington, Multnomah, Clackamas and Hood River Counties in Oregon and the Fort Vancouver Regional Library system in SW Washington (Clark, Skamania and Klickitat cos). This allows residents of any of those areas to register at and checkout materials from any of the other libraries for free. MIX is based on the idea that people should be able to use whichever library is convenient for them. Our political boundaries are arbitrary and peoples' life activities cross them all the time –library service should Be That Fluid, too.

This is different than the inter LIBRARY efforts described previously. By contractual arrangement these libraries agreed that “My patrons are your patrons and your patrons are mine, and they may use our services directly and freely.”

I'm a good example – I live in Portland and I work in Hillsboro. Every morning I pass a long line of cars heading into Portland. People move around!

MIX transactions are patron Initiated and patron driven – the libraries don't get in the middle. MIX was the basic model for the Passport program.

MIX continues today and to echo one of the comments about Passport – patrons think it is the way libraries SHOULD Work. They totally take it for granted that they can use any library.

Here's an example of why it makes sense:

Garden Home Community Library in WCCLS is about a block from the Multnomah County line. I'm pretty sure Many residents in that area have no idea which county they live in. And for library service, it doesn't matter.

MIX: covers about 45% of the population of Oregon.

total annual circulation to MIX patrons in the region is about 2.5 million.

WCCLS has over 22,000 Registered MIX patrons. (That's why the 340 Passport patrons Don't really concern us much.) Over the years the net-lender has changed. It used to be Multnomah and now WCCLS is the net lender. Use ebbs and Flows depending upon housing and employment patterns and upon library collection growth and open hours. In the early years, the participating Libraries reimbursed each other for net-borrowing. This was to address some of the same Fears people had about Passport – suburban residents would overwhelm the Multnomah Central Library for Example, or those people from Vancouver! Don't get me started!

In the late 1990's we finally said to Heck with it and stopped exchanging money and the sky has not fallen.

Similarly, the ORBIS Cascade Alliance was developed in 1993 to serve the needs of academic libraries in Oregon and Washington.

There are currently 39 members of ORBIS.

In addition to the shared library catalog for members, ORBIS also contracts for a multi-state ground courier to Deliver materials between libraries – members or not. Patrons of ORBIS libraries (faculty and students) can either Borrow materials through The catalog or by visiting other libraries so it accommodates both direct borrowing and Library mediated borrowing.

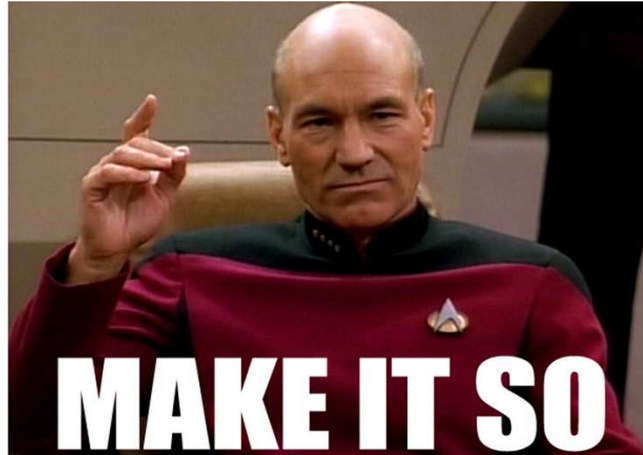
# YOU ARE HERE



So what does all of this have to do with the Oregon Library Passport Program? Libraries have long endeavored to either share their collections with each other or to open their doors to patrons from other libraries. We've gone to great lengths to make that happen (flying catalog cards To London takes the cake for that!) Despite multiple Vision Statements desiring statewide cooperation and sharing, I think Oregon libraries finally acknowledged that there would never be any magical pot of money that would Cover the costs of a statewide library catalog and a Statewide library card and the logistical and jurisdictional difficulties of getting every library to Agree on shared polices would never be surmounted. So, if PERFECT is never going to happen, what can we do To be almost perfect?

Most Oregon libraries are on OCLC and can initiate interlibrary loans. We have a statewide ILL Agreement to not charge each other fees for ILLs. Many libraries contract for ORBIS Ground Courier to move materials between libraries. So, we've got that traditional ILL stuff covered for the most part. With MIX and ORBIS the **majority** of Oregon library users also have direct borrowing privileges at other libraries.

Raise your hand and...



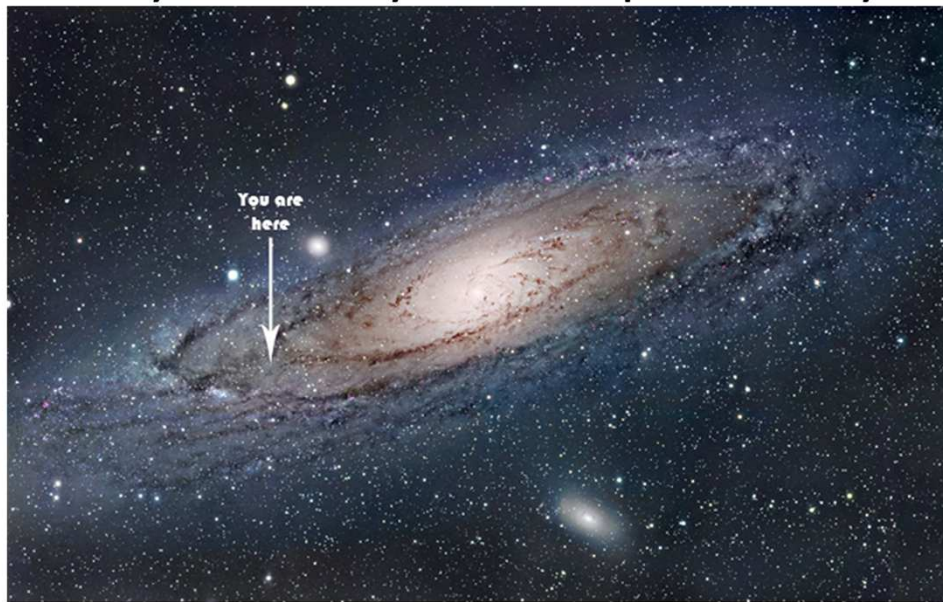
But what about direct borrowing for the rest of the state? Passport is a way for those libraries that are willing and able to just go for it. Make it so.

If traditional ILL is relying on the kindness of strangers and regional agreements are relying on the kindness of neighbors, then maybe the Passport Program is more like a “Friends and Family” plan – we have a shared connection and can agree to be friendly and to share our minutes, or I mean materials!

Sharing resources is based on the theory that the whole is greater than the sum of the parts. By sharing library resources we improve service to our patrons, locally and across the system.

It’s about relationships and building community. We share our materials and welcome patrons who aren’t “ours” because people want to be part of “us.” That’s a good thing.

Do you have your Passport ready?



So, do you have your Passport ready?

Notice that the "You are Here" is not the CENTER of the universe. None of us are the center, But all are part of the galaxy.

Thank you. I'd be happy to answer any questions or hear your thoughts.