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PORTALS - the Portland Area Library System: The promise of a virtual research library

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## PORTALS - the Portland Area Library System: The promise of a virtual research library

by Gretta Siegel  
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### Introduction:

About a year ago, someone from eastern Washington phoned and asked me about PORTALS. He was working with a group of libraries who were building a consortium and thought that PORTALS would be a good model to look at. I was a bit perplexed - yes, I was involved with PORTALS, but the problem was, it didn't really exist as anything that I could point to and say, here, this is PORTALS. Now, a year later, I can proudly say that we have indeed metamorphosed into something identifiable, though the evolution continues. This article will attempt to describe what PORTALS is, how it came into being, and where it is headed.

### Foundings:

In 1989, the Governor of Oregon (Governor Neil Goldschmidt) appointed the "Commission on Higher Education in the Portland Metropolitan Area" to study the state of higher education and to make recommendations for improvement. One of the outcomes of this effort was the formation of a Council of Presidents, representing eight institutions in the Portland area (Portland State University; Oregon Health Sciences University; Reed College; Lewis and Clark College; Oregon Graduate Institute; Pacific University; University of Portland; Portland Community College). The Council of Presidents was to study ways in which inter-institutional cooperation could be fostered.

Early in 1990, the Library Directors of these institutions took it upon themselves to form a group (the Council of Librarians), and to present to the Council of Presidents the idea that, since libraries already shared a longstanding commitment to inter-institutional cooperation, they could put together a plan which would show what libraries could do to further Commission's goals. The initial result of this effort was a document produced in October of 1990 and presented to the Governor's Commission titled "A strategic plan for improving academic library resources in the Portland metropolitan area". This document provided a blueprint for PORTALS, as well as something concrete enough to elicit initial funding.

As the strategic plan points out, Portland is one of only two U.S. metropolitan areas of its size without a research library (as defined by ARL, the Association of Research Libraries). Realizing that the current political and economic climate was unlikely to yield funding to create a traditional research library any time soon, a more creative approach to addressing this deficiency was sought. The vision which took shape, and which we are currently working towards, is that of a "virtual" research library - a network of resources available within the

defined geographic region which, when taken together, create a resource much greater than the sum of its parts. The keys to doing this, of course, are cooperative collection development, technology, and high-speed, efficient delivery services. The keys to making these elements work are institutional commitment, trust, and, of course, money.

In November of 1990, the Governor's Commission released its report titled "Working Together: A Community and Academic Partnership for Greater Portland" in which the development of an integrated academic library was recommended. The Commission, which had completed its task, also called for the creation of the Greater Portland Trust, a group of individuals who would be able to guide the implementation of the Commission's recommendations.

Some initial funding was provided for working on several of these fronts. In 1991, President Judith Ramaley (PSU) requested funding for PORTALS as part of PSU's biennial budget request. The state approved \$1 million dollars for PORTALS for 1991-1993, however, some restrictions were attached to the money in terms of how it could or could not be used to benefit private or out of state institutions. Through Lewis and Clark College, an LSCA grant for \$15,000 was applied for and received to do an assessment of the state of access at each of the participating libraries, and to come up with recommendations for a uniform reciprocal borrowing system.

#### Evolution of a Network / Evolution of a Consortium:

By early 1991, three other institutions had been invited to participate on the Council of Librarians: the Multnomah County Library, the Oregon Historical Society, and Washington State University Vancouver. At this point, representation in the group included three public universities from two states - one with a medical school and medical library; a community college; a large public library; three private liberal arts institutions - one with a law school and law library; one Catholic liberal arts university; one private graduate engineering school; and the state historical center library. It was the charge of this group to find ways to spend the initial funds. We needed to create something tangible, something that encouraged further development, and something that began to fulfill the promise of the strategic plan. It was also our charge to create some kind of formal structure. We found that it was much easier to spend the money....

For much of 1992, both of these charges were carried out simultaneously. There was a lot of pressure felt to do something highly visible with the state funds as soon as possible, yet there was some trepidation about doing too much, until we had a formal framework for decision making. We knew that part of the overall picture included a linking of all of the online catalogs, and that the best wide area network to communicate over would be the Internet. We knew that we needed some technology to enhance document delivery. We knew that we wanted to mount commercial databases. Of course we also knew that we needed someone to make these things happen. In early 1992, a Network Development Director was hired to carry out the technical aspects of the project.

By the fall of 1992, several catalogs were searchable via the PORTALS network. A dedicated computer, housed at Portland State University, takes the catalogs from the other schools (via the Internet) and presents them via a "front-end" menu to anyone using the PORTALS system, accessible to anyone else with an Internet connection. Journal articles are then requested and delivered via ARIEL workstations (computers with network software, scanners, and printers) providing much better copy quality than facsimile transmission. In November of 1992, PORTALS went public with a dedication, replete with speeches, demonstrations, and refreshments. We still weren't sure what or who we were, but we sure had something to show!

In 1992, the Murdock Foundation awarded a grant to PORTALS which would enable us to engage in a planning process which would ultimately lead us to a formal organized structure. From the fall of 1992 through the winter of 1993, the Council of Librarians, along with several Chief Academic Officers, a representative of the Greater Portland Trust, and three library consortium consultants held four intensive planning retreats. The goals for this planning process were to (a) write a mission statement; (b) devise criteria for membership; (c) create a structure for governance; (d) update the strategic plan; (e) prepare a business plan. After much hard work, we had not only met our goals, but had built a strong foundation for the most difficult aspects to achieve, institutional commitment and trust.

#### Outcomes of the Planning Process:

The mission statement for PORTALS reads as follows:

"The Portland Area Library System (PORTALS) was established in 1992 to create an organization of public and private institutions committed to working cooperatively to expand and enrich the information resources and services necessary for the scholarly activities of the college and university community and those people with similar needs in the greater Portland area."

"Using new and existing technologies to improve resource sharing, cooperative collection development, and other collaborative pursuits, PORTALS supports and enhances the intellectual, cultural, and economic vitality of the area by providing easier and faster access to larger, shared library and information resources."

To qualify for membership, an institution must be within the 5 county area as designated by the Governor's Commission (Multnomah, Washington, Clackamas, Yamhill counties in Oregon, and Clark County in Washington); must be a not-for profit institution; must have Internet access, an online public access catalog, and 100% of its records in machine readable form, or the commitment to meet these requirements within two years of joining PORTALS; if a University or College, must be fully accredited; must have a library collection of significance to scholarly pursuit. Member institutions must be willing to participate in governance, to share in the costs of maintaining PORTALS, and to make a commitment to cooperative collection development.

The governing body of PORTALS is a Board of Directors made up of the Chief Executive Officers of each member institution and one Community representative selected by the board. Three non-voting members, the Executive Director, the Chair of the Council of Librarians and one other person from the Council also sit on the Board. The function of the Board is mostly budgetary and to provide oversight for the work carried out by the Council of Librarians and the Executive Director.

In July of 1993, the Charter for PORTALS was signed by the CEOs of each institution. All of the eleven institutions who participated in the planning process formally became founding members, as well as three new institutions - George Fox College (private, liberal arts), Linfield College (private, liberal arts), and Clark College (public, community college, Washington). In August of 1993, an interim Executive Director was hired.

Currently, PORTALS operates under the auspices of Portland State University, but eventually plans to become an independent, not for profit organization owned by the members.

#### Databases and Search Engine:

At this writing, we are in the midst of contract negotiations with vendors regarding the mounting of databases on the PORTALS network (so I can't write out a list). By the time this is published, we hope to have at least six to eight commercial databases available, ranging from government documents to science and engineering to humanities and social sciences. Currently, the CARL Uncover database is available and is interfaced with the holdings records of PORTALS libraries. We sent out an RFP for search engine which would provide the front-end for these databases, and BRS has just been awarded the contract. They will provide interfaces for both MS-DOS and MAC environments.

#### Cooperative Collection Development:

Enhancing access to bibliographic information, as we know, is only half of the equation when trying to provide good library service. The collections to support the hunger for published information which we encourage with database access must also be readily available. This is the hard part. Taken all together, the PORTALS libraries represent quite a bit of redundancy, and are still a ways off from being a research library. One of the premises, however, of joining this consortium is that members will continue to support their primary clientele at least as well as they are supporting them now. This means that journal subscriptions will not be cancelled because 'someone else in PORTALS already gets it'. However, it does mean that we will be able to identify unique strengths of each member institution, and will create strengths where there may not be any. Members will then be able to put new acquisitions dollars into building depth in their assigned areas of strength.

We are awaiting reports from WLN who has been processing tapes from each of the members. These reports will analyze overlap between collections, compare PORTALS

to identify unique strengths of each member institution, and will create strengths where there may not be any. Members will then be able to put new acquisitions dollars into building depth in their assigned areas of strength.

We are awaiting reports from WLN who has been processing tapes from each of the members. These reports will analyze overlap between collections, compare PORTALS collections with BCL3 (Books for College Libraries), and will analyze the combined collection against a research collection (the University of Washington). Once we study these reports, we will then be able to start negotiating with each other regarding who builds on what strengths.

#### Current Issues to Resolve:

As of this writing, there are of course many yet unresolved issues. I have outlined some of the requirements of membership, yet we are still unsure about the package of benefits that a member institution derives from their commitment, money, and work. We know that we wish to provide some form of access to groups who may not qualify as members, or who may not choose to join - how do we do this in a fair and legal way? As we make our decisions about where to spend our money, other issues present themselves - sometimes expectedly, sometimes surprisingly. Do we purchase databases which serve the most people, serve the most institutions, or provide access to databases that most institutions could not afford to buy alone? It's easy to get journal articles delivered via fax or ARIEL, but how do we get books from place to place? Are we requiring standards of delivery that as individual institutions we can't afford to staff? How do we share expensive reference books in a cooperatively developed collection? These are just a few of the issues that are being talked about and worked on. We have made a great start, but we know that we still have a long way to go. So far, the trust seems to be holding.

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