Changing Library Operations: The Orbis Cascade Alliance

Allen McKiel
Western Oregon University, mckiela@wou.edu

Jim Dooley
University of California, Merced, jdooley@ucmerced.edu

Follow this and additional works at: http://docs.lib.purdue.edu/atg

Part of the Library and Information Science Commons

Recommended Citation
DOI: https://doi.org/10.7771/2380-176X.6922

This document has been made available through Purdue e-Pubs, a service of the Purdue University Libraries. Please contact epubs@purdue.edu for additional information.
the amount of use it would receive. This is particularly likely to be the case when a book, formerly purchased only once every five to ten years in paper, turns into an annual online subscription.” (2012, p. x). Whether an electronic title has a version for mobile devices may be another consideration as students make more use of mobile devices and less use of computers.

When making choices between print and electronic versions, cost is a primary consideration, but that, too, is not straight-forward. Is the cost of an electronic source one-time or an on-going subscription? Is there an annual maintenance fee? If the electronic product seems the better choice on other criteria, will increased access make the cost per use less than the print version? Are the faculty making assignments that require a particular title ready to switch to the electronic? A brief demonstration of the electronic product might bring even reluctant eBook users on board, but you have to be willing to market new formats as readily as you do new titles.

The criteria for print sources and content have been developed over many decades and are widely understood. We must look at the interface for electronic sources and evaluate it just as critically. Is it easy to get to a full-screen view of the pages? Can a range of pages be printed easily? Is the source searchable, or is the index linked to the text so that the user does not have to page back and forth through the volume to get to the article desired? Are there multiple types of searching (keyword, article titles, source title, publisher, author, date, subject)? Can these access points be combined in one search? Is the print easy to read on screen? Look at the font, size, and layout. Are there any advanced features, such as the ability to create an individual account to save notes, personal search terms, or create folders in which to save results?

One important bit of advice: get Reference Universe! I have no financial stake in Paratext, but I find myself advocating for the use of Reference Universe regularly. Remember the beginning of this essay, when I stated that “until quite recently, there was no article-level indexing?” That fact put reference collections at a par with periodicals before the advent of periodical indexes. Reference Universe is a unique product that focuses on reference sources and indexes at the article level. This indexing means that Paratext has finally brought access to reference collections into the late 19th century! Reference Universe is a major way for users to find needed reference sources on their topics. It brings access to articles in print and electronic reference sources together, achieving for reference sources what periodical indexes did for journals, and more.

Teaching users how to browse is still a valid use of instruction time, but Reference Universe will give them the call number for a print source on their topic or a link directly into the text of an electronic source, which now brings access to the 21st century. The keyword searching can be targeted to specific areas of the record, an improvement on general searching that Paratext made after hearing from their customers. Paratext seems to listen to their customers. If you aren’t subscribing to Reference Universe, you aren’t providing the best access to your reference collection, and your reference collection is not getting optimal use. My advice is to subscribe to it, use it, and teach its use regularly. Users will be amazed at the quantity and quality of information they can find in your reference collection!

Reference and instruction librarians must focus on the content and not the format of reference sources. They need to keep up with interface changes, new editions, new features, and added sources. They need to feel confident in navigating the entire collection, print and electronic, to help users find the best sources for their research needs. Nonetheless, the modern academic reference collection needs a reference manager that can keep all the issues related to reference sources on the radar of all who work with the collection. It is a complex task, even where the physical collection is shrinking.

References

Rosanne Cordell is the Associate Dean for Public Services at Northern Illinois University where she supervises reference, instruction, document delivery, reserves, circulation, and collection maintenance services. Previously, she was the Head of Reference Services at Indiana University South Bend, where she had also served as Head of Library Instruction. Her interests include intellectual freedom, privacy, reference services, and information literacy. She was the chair of the American Library Association’s Office for Information Technology Policy Digital Literacy Task Force and is currently a member of the Digital Content Working Group. She remains active in the ALA Intellectual Freedom Round Table, the Freedom to Read Foundation, and the Retired members Round Table. She is the author of the recent IGI Global title, Library Reference Services and Information Literacy: Models for Academic Institutions.

Changing Library Operations — The Orbs Cascade Alliance

Column Editors: Allen McKiel (Dean of Library Services, Western Oregon University) <mckielawou.edu> and Jim Dooley (Head of Collection Services, University of California, Merced) <jdooleyucmerced.edu>

The evolution of library cooperatives and consortia promises new levels of operational effectiveness and efficiency, albeit with accompanying complexity and uncertainty. This is the first article in a series that will look at the emerging shape and characteristics of the Orbs Cascade Alliance, a non-profit consortium of 37 academic libraries in Washington, Oregon, and Idaho that jointly serve over 275,000 students. The incorporated (501(c)(3)) organization facilitates, with the efforts of eight staff and the comprehensive cooperation of member library staff, the provision of a wide range of cooperative services. This article will look briefly at its mission, history, and organizational structure. Subsequent articles will emerge through librarians willing to share their knowledge and experience of the operations of the Alliance. This author will also contribute articles through conversations with members of the Alliance as well as his own experience as an Alliance Council member for the past six and a half years.

Mission

The mission statement posted on the Alliance Website is accompanied by vision and values statements, which express the spirit of the Alliance. It is expressed more explicitly in its current strategic agenda. The collaboration is both cooperative and competitive in that we challenge each other to find innovative means to jointly advance the library missions of the individual institutions we serve. My own experience

continued on page 55
Service the collective good of our member col-
to change, and the creation of solutions that
Where differences occur
that elicits and includes the perspectives of
discussion and collaborative decision making
elevate our ability to deliver outstanding ser-
together to challenge traditional thinking and
researchers. We bring multiple perspectives
together in the spirit of
is an exemplar of the 21st-century library
The Orbis Cascade Alliance en-
ri
din search for optimal
to 1998 they began a cooperative
electronic resources (ER) program.
The Washington State Cooperative Library
Project (WSCLP) joined to form a union
catalog in 1996 with six state universities —
the Ev
er

the first private institution to join, and in 1998
the Summit borrowing program under INN-Reach.
The Orbis Cascade Alliance currently has 37
and is incorporated as a 501(c)(3). We share a
program under INN-Reach — Innovative Interfaces
software platform for cooperative interlibrary loan.
In 2002, the 19 libraries that Orbis had
grown to joined with the 7 libraries of Cassi to form
the Alliance and by 2003 had initiated the Summit
borrowing program under INN-Reach. The Orbis
Cascade Alliance currently has 37 member libraries
and is incorporated as a 501(c)(3). We share a
collection of approximately nine million print
monograph titles; cooperatively manage an
program that coordinates over $10 million
for resource access; is jointly implementing a
shared ILS and coordinating its shared oper-
ations including technical services, discovery
services, systems development, cooperative
acquisition and access development, and
assessment. The Alliance is progressively
functioning as a single entity.

Organizational Structure
Alliance Staff provide the foundation for all
of the organizational structure of the Alliance.
Their efforts provide the stability and coor-
dination for its daily operation and identity.
The Alliance began at University of Oregon in
1988 with the first three state universities
contributed by three University of Oregon
staff members: John F. Helmer, Alice Allen,
and George Shipman. Today, the Alliance
has a staff of nine. John F. Helmer (1993) is the
Executive Director of the Alliance and has
been the designer, mentor, coordinator, planner,
and problem solver from its inception. He is
the steady hand that has a respect from those
that work with him that I have seen acco-
ded to few in my career. I believe the Alliance
owes much of its thoughtful, open, and fair-minded
culture to his working example.

Debra Place (1997) is the Business Man-
ger; Jodi Allison-Bunnell (2001) is the
Northwest Digital Archives Program Manager;
Greg Doyle (2003) the Electronic Resources
Program Manager; Elizabeth Duell (2007)
the Events Coordinator; Ana Arnold (2009)
the Resource Sharing Program Manager and
Courier Program Manager; Keith Folsom
(2011) the Information Technology Manager;
Al Cornish (2013) the Shared ILS Program
Manager; and Kathi Fountain (2013) the
Collection Services Program Manager.
The Alliance is currently in the midst of
changing its operational structure to accom-
modate an increased level of operational co-
ordination, much of it focused on features
focused on the implementation of a shared ILS.
The current structure consists of the organized
interactions of six entities: Council of Library
Directors, Board of Directors, Alliance Staff,
Standing Committees/Teams, and Working
Groups. The Dean or Director of each of the 37
participating libraries comprises the Council.
They meet three times a year in the fall, spring,
and summer. The meetings generally run from
Thursday afternoon through Friday morning.
The agenda is set by the Board through input
from all of the other aspects of the Alliance
particularly from Standing Committees/Teams.
On Thursday the issues and their subsequent
proposals are presented by representatives from
Standing Committees/Teams and are broadly
discussed. The mood and tenor of the discus-
sions from my vantage point has generally
been strikingly inclusive and sensitive to the
diversity of individual institutional needs, yet
open and direct. As needed, discussion and
problem solving continue informally on Thurs-
day evening; and on Friday the proposals are
again discussed, revised, and votes are taken.
Discussion generally continues until courses
of action emerge that provide for consensus,
generally expressed in a unanimous or near
unanimous vote. The ten-member Board is
elected annually through online balloting. All
Council members are eligible for each election
unless they decline.

Standing Committees/Teams are formed by
Council to address operational areas that
require ongoing participation by all member
institutions. A new team structure was ad-
opted at the spring Council meeting that is
partially implemented and is expected to be
fully in place by summer 2015. There are
standing teams in nine functional areas, four
administrative and five program areas. The
administrative teams (Assessment, Center of
Excellence, Finance, and Policy) are appoint-
ed by the Board and provide administrative
information for the Board and Council for
deliberation and decision making. The pro-
gram area teams (Collaborative Workforce,
Content Creation & Dissemination, Discovery
& Delivery, Shared Content, and Systems)
consist of five to seven members nominated
by Council and appointed by the Board.
The teams are chaired by a library staff member
appointed by the Board. The Alliance pro-
gram manager serves on each team as does
a Council member; both are appointed by
the board. Appointees serve two-year terms.
Teams receive direction from the Board and
continued on page 56
Council and operationally receive systematic input from representatives from all 37 member institutions for operational decisions. They are the mechanism for balancing top-down and bottom-up coordination. Representatives to the teams are appointed by each member library for each program team. Teams may form ad hoc working groups from member libraries.

**Administrative Teams**

*Assessment Team* — The Assessment Team is charged with developing data collection and reporting mechanisms and procedures essential to informed planning and operation of the Alliance programs and initiatives. The Team serves the needs of the Board, Council, Alliance staff, and the membership with assessment information for efficient operation and validation of effective commitment of resources.

*Center of Excellence* — The Center of Excellence (COE) Leadership Team is appointed by the Board to promote the development of the consortial functionality along with our shared ILS vendor, Ex Libris. Drawing from the experience, expertise, and vision of the Board, Council, staff, operational teams, vendors, and working partnership with Ex Libris, the COE Leadership Team is charged to identify shared ILS software and workflow initiatives that advance the Alliance’s mission.

*Finance Team* — The Finance Team oversees the investment portfolio and makes recommendations on investments; reviews external audits and makes recommendations to the Board concerning the annual audit and any fiscal issues that arise; oversees compliance with regulations and the filing of federal and state tax documents; and recommends adjustment to financial policies. This year they are also developing recommendations for a philosophical and business approach to shared work.

*Policy Team* — The Policy Team determines a course of action for issues that affect policy that is beyond the purview of program area Teams. Alliance Teams working with the broad representation from the member libraries are the data gathering, analysis, and decision-making mechanisms for ongoing daily operations and problem resolution. As such, they “are empowered to identify and implement consortium-wide policies, procedures, standards, and workflows; consult and communicate with the Alliance membership; and serve as expert resources.” Issues that may affect the Alliance budget, strategic initiatives, or equity across the membership, or those that require information and expertise beyond the team are referred to the Policy Team for resolution. The Policy Team determines a course of action. Some decisions may be resolved directly by the Team through gathering more information and input from other Teams and experts in the Alliance membership. It may also forward the issue to the Board, which may ultimately submit the issue to Council for a decision.

**Program Area Teams**

*Collaborative Workforce Team* — The Collaborative Workforce Team coordinates staff communication and development for the shared human resources of all Alliance consortium and member libraries. “The team develops and assesses shared workflows, training, documentation, and professional development in support of Alliance initiatives.” Integral to this charge is the responsibility “for implementing and refining a model for shared work based on Alliance principles and guidelines.” The progressive change in library operations driven by technological innovation necessitates an emphasis on continual learning and increased effectiveness of communication and coordination associated with changing staff roles. This is true for an individual library. It is of even greater importance to the coordinated efforts of a consortium of libraries embarking on the implementation of shared programs and their associated operations. Critical to this effort is the evolution of equity in arrangements across diverse institutions for shared staff and cooperative funding for programs. The varied size, mission, staff capacity, and budgetary exigencies of the participating libraries provide multiple levels of complexity within which systems of equitable participation will continually evolve through communication, data collection, assessment, and consultation.

*Content Creation & Dissemination Team* — Growing in prominence to academic library identity is its role in the discovery, creation, management, and dissemination of unique local content. The ascending expectations for Internet access to formerly locally-bound collections for research and teaching and changing patterns of peer review and publishing are advancing the priority for cooperative dissemination and publication. The Content Creation and Dissemination Team is charged with discerning and implementing cooperative steps forward. “The Alliance values flexible, scalable approaches in support of new modes of scholarship, publication across the research lifecycle, and traditional and new uses of hidden collections in teaching and learning.” The team “investigates and implements solutions for unique content needs, recommends consortium-wide practices, and supports an integrated approach for publishing, storing, discovering, and preserving resources in our special collections, archives, and digital repositories.”

*Discovery & Delivery Team* — The evolving technologies of discovery via the Internet have dramatically altered expectations for access to library-provided information resources. The Discovery and Delivery Team steers “development and use of Summit [the Alliance resource sharing system], Primo, and other discovery and delivery services” through policy and procedure adaptation and ongoing assessment of advances in technologies and services. This team’s charge includes coordination of the Alliance’s metadata practices with vendors of information resources and their associated metadata.

*Shared Content Team* — The publication and dissemination of information resources in general and the scholarly resources of particular concern for academe straddle the bridge of disruptive technologies of the Internet that are replacing the printing press as the primary means of reproduction. As expectations on the part of librarians associated with the cost-per-copy approaching zero collide with the search by publishers and vendors for a sustainable path through the disruptions, this team is charged with discovering and negotiating optimal access to information resources. The “team continually assesses, manages, and develops initiatives that broaden access by providing cost-effective sharing, licensing, and description of such content.”

**Systems Team**

The hardware and software technologies associated with the growing arena of information and communication resources affecting libraries, from cell phones and tablets to evolving institutional repositories and cloud ILS systems, are the content area of the Systems Team. The “team oversees system implementation, investigates new solutions, and continually assesses existing systems against emerging needs and technological change to ensure agility and achieve improved functionality, efficiency, and interoperability.”

---

**Editors’ Note:** All quotes are from the Alliance Website at https://www.orbiscascade.org. — AM and JD