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Changing Library Operations: The Orbis Cascade Alliance

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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

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Changing Library Operations — The Orbis Cascade Alliance

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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 Orbis 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

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rience has witnessed an evolving organization knit together through the bonds formed in open consultation over the search for optimal and inclusive innovation. The following are the mission, vision, and values statements of the Alliance.

Mission — The Orbis Cascade Alliance enables member libraries to advance institutional missions through collaboration and innovation.

Vision — The Orbis Cascade Alliance is an exemplar of the 21st-century library consortium. We join together in the spirit of innovation and combined expertise, seeking efficiency and productivity to strongly promote the success of students, faculty, staff, and researchers. We bring multiple perspectives together to challenge traditional thinking and elevate our ability to deliver outstanding services, programs, and collections.

Values — As a membership organization we value open communication, innovation, agility, discussion and collaborative decision making that elicits and includes the perspectives of each member. We value and nurture strong and lasting personal and institutional commitments to our work together. Where differences occur we value open debate, exploration, willingness to change, and the creation of solutions that serve the collective good of our member colleges and universities as a whole.

Strategic Agenda

The Strategic Agenda advances the Mission and Vision of the Alliance. All members support the Strategic Agenda initiatives, each of which includes a set of objectives. Council works to determine the priority, timing, and process associated with pursuing and assessing each objective. The Strategic Agenda has three broad areas: Work Smart; Design for Engagement; and Innovate to Transform.

The spirit of “working smart” is expressed as working and partnering “at the appropriate scale: local, regional, national, and international.” Working smart calls for focusing and coordinating our joint efforts to maximize their impact across the diverse venues of Alliance activity and urges us to

- Do things once
- Do things the same
- Do things together.

It also requires investing in staff development as an aspect of leveraging our joint financial resources.

Designing for engagement is the heart of the strategic agenda, in that it issues from the academic mission we all serve as librarians to “collect wisely, share freely, and enhance the teaching, learning, and research environment.” The design’s implementation is expressed in the Alliance’s operational agenda and structure, which are discussed below.

The third context of the strategic agenda, innovation for transformation, calls for action oriented research in which the evolving information technologies are adapted to “push

boundaries, change the landscape, and inspire the profession.”

History

The Orbis consortium formed under the fiscal agency of the **University of Oregon** through a **Meyer Memorial Trust** grant in 1993 with five state universities — **University of Oregon, Eastern Oregon University, Southern Oregon University, Western Oregon University, and Oregon Institute of Technology**. Its initial objective was the formation of a union catalog, which became a reality in 1995 and by then included two private members — **Willamette University** and **Linfield College**. By the time Orbis libraries started borrowing in 1997 it included 12 libraries and in 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 — **Central Washington University, Eastern Washington University, The Evergreen State College, University of Washington, Washington State University, and Western Washington University**. The following year the **University of Puget Sound** became the first private institution to join, and in 1998 WSCLP initiated an ER program. By 2000 WSCLP became Cascade and migrated to 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 Cascade to form the Orbis Cascade 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 ER program that coordinates over \$10 million for resource access; is jointly implementing a shared ILS and coordinating its shared operations 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 coordination for its daily operation and identity. The Alliance began at **UO** in 1993 with time 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 accorded 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 Manager; **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; **Anya 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 accommodate an increased level of operational coordination, much of it at this juncture 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 discussions 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 Thursday 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 adopted 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 appointed by the Board and provide administrative information for the Board and Council for deliberation and decision making. The program 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. An Alliance program 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

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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

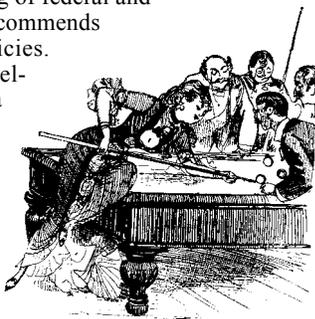
with discerning and implementing cooperative steps forward. “The Alliance values flexible, scalable approaches in support of new modes of scholarship, publication across the research lifecycle, and traditional and new uses of hidden collections in teaching and learning.” The team “investigates and implements 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 technology 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 discerning 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**