Greetings from the Board Chair and Interim Executive Director!

Michelle Bagley and Maija Anderson

We are looking forward to seeing approximately 200 of our members at our Summer Meeting on July 10th, at Hotel Murano in Tacoma. It has been 3 years since the Alliance has held a Summer Meeting, an inclusive event that brings together members from across our community to learn about Alliance services and strategy. Summer Meeting has also been a time to connect with Alliance colleagues and to build community across the consortium. The Alliance’s strengths are our members, the relationships and trust we develop through out work, and our shared commitment to excellence in academic libraries.

The program features presentations on topics such as open access and Alma Analytics; Team spotlights on the strategic plan; a plenary on Alliance strategy; and education sessions from our colleagues at Ex Libris. The day will end with a reception celebrating the 25th anniversary of the Alliance. Thanks to the Summer Meeting Program Committee: Elizabeth Duell (Alliance), Mary Grenci (UO), Molly Gunderson (PSU), Merri Hartse (EWU), Kate Jones (SOU), Holly Kubly (UO), Jada Pelger (UPS), Pam Pierce (OHSU). There is no cost to attend for Alliance members. See you in Tacoma!
Central Staffing Updates

**Executive Director search.** On June 27th Jan Asnicar, Senior Consultant with Summit Search Solutions will meet with the Alliance staff, the Board of Directors, and the Search Committee. These meetings will lay the groundwork for launching the recruitment for a permanent Executive Director for the Alliance early this summer.

The Executive Director Search Committee members are: Xan Arch (University of Portland), Chair; Dalia Corkrum (Whitman College); Ben Hunter (University of Idaho); Megan Dugan (Mt. Hood Community College); Betsy Wilson (University of Washington); Ryan Ingersoll (George Fox University), Search Advocate.

**Lori Hilterbrand** is the Alliance’s new Program Manager for Resource Sharing and Fulfillment! Lori comes to the Alliance from OSU; she has contributed to the Alliance as a leader in the RSF community, and a member of the Strategic Plan Project Group. Lori’s first day of work will be August 5th; she will be working in Eugene. As Program Manager for RSF, Lori will work with member libraries, vendors, consortium staff, and Alliance teams to oversee, coordinate, develop, and assess the Resource Sharing & Fulfillment Program. Many thanks to the search committee, whose exceptional collaboration culminated in this recruitment: Jesse Holden (Alliance; Chair), Erin Bledsoe (CWU), Cassie Franks (Washington County Cooperative Library Services), Tricia Bender (Chemeketa CC), Adebola Fabiku (UW)

Congratulations to **Angeline Schoonover**, the Alliance's Electronic Resources Specialist, who is taking the position of Electronic Resources Librarian at Reed College! Angeline has been with the Alliance since fall 2017. Reporting to Jesse Holden, she manages many of our ER renewals and has been working diligently on our migration to the ConsortiaManager ERM. All of us at the Alliance are pleased to see Angeline take this exciting next step in her career, and gratified that her talents will continue to benefit the consortial community. Angeline's last day as Alliance ER Specialist will be August 8.

We are receiving applications for the Program Manager, Discovery and User Experience. Our search committee is Bryan Vogh (Chair, Alliance), Rami Attebury (Idaho) Bill Kelm (Willamette), Stephanie Michel (UP), and Anne Pepitone (UW). They are seeking to develop a strong and diverse candidate pool, and will move on to the next steps of the recruitment in early July.
The search for the Program Manager, Unique and Local Content will re-launch this summer. Our search committee agreed that soliciting a new candidate pool was the best way to ensure we make the right hire for this position. Thanks and congratulations to Laura Buchholz (Reed), who served as interim coordinator for ULC, and is expecting a new baby this month! We are seeking a member to serve as ULC Interim Coordinator through the end of 2019 - this is a paid, contract-based position - Please contact Maija Anderson (madnerson@orbiscascad.org) for more information.

Thanks to Departing Board and Team members!

It's time to say goodbye to members rotating off Alliance Teams and the Board of Directors. All of our departing members put in extra effort this year to fulfill their roles while managing the impact of reduced central staffing. Our sincerest thanks for their hard work on behalf of the consortium!

**Board of Directors:**

- Xan Arch (University of Portland)

**Discovery and User Experience Team:**

- Anne Pepitone (UW, chair)
- Molly Gunderson (PSU)
- Holli Kubly (UO)
- Barbara Valentine (Linfield)

**Shared Content and Technical Services Team:**

- Mary Grenci (UO, chair)
- Andy Eickholt (EWU)
- Linnea Marshall (Idaho)
Resource Sharing and Fulfillment Team:

- Jen Jacobs (LCC, chair)
- Jada Pelger (UPS)
- Jennie Rossie (UW)
- Lori Hilterbrand (OSU)
- Jesse Thomas (WWU)
- Erin Bledsoe (CWU)

Systems Team:

- Paul Ojennus (Whitworth, chair)
- Merri Hartse (EWU)

Unique and Local Content Team:

- Anne Jenner (UW, chair)
- Ryan Hildebrand (UO)
- Zach Selley (Lewis & Clark)

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**Year-End Highlights from Alliance Teams**

All of our Teams successfully completed the strategic plan implementation process, with many other impressive accomplishments to boot! Our Team chairs and program staff submitted the following highlights, with acknowledgments of exceptional work by members:

**Discovery and User Experience Highlights**

*Anne Pepitone, chair and interim coordinator*

- Completed strategic plan implementation process; began work on Alliance-NWACC joint working group on accessibility; continued work on Primo release testing
- User Testing Toolkit completed
• Reference and Instruction report finalized and shared with Council; new standing group created in response

• Held 5 open calls with topics drawn from community feedback. March open call on how Primo displays Alma data drew 53 online participants

We wouldn’t have been able to be a successful new program area/team without having such a strong foundation built by the members rolling off DUX. Words can’t express how grateful we are for the hard work and time spent by the following individuals: Molly Gunderson took on the duties of chair only one month after the team started, due to our initial chair stepping down. Molly wasn’t even the chair-elect and she stepped up for ten months to begin the initiative process strongly out of the gate. Holli Kubly took charge of the User Testing Toolkit group and led that group to produce an exceptional high level resource for our community. Barbara Valentine undertook the overwhelming task of doing data analysis of the entire reference and instruction survey. She also took on the duty of being liaison to the Primo customization working group, bringing a DUX perspective to tools being produced by this group. Anne Pepitone fearlessly led the DUX team as chair this past year, during a time of major transition. Her expertise in all things Primo-related made her an excellent advocate for the team and for the DUX reps. With Anne as chair DUX finalized the initiatives, presented at ELUNA, and was involved in problem-solving Primo issues as they arose at the Alliance level.

Resource Sharing and Fulfillment Highlights

*Jen Jacobs, chair; Kate Jones, interim coordinator*

• Completed strategic plan implementation process;
• Redesigned AAR documentation and ongoing revision of Summit documentation
• Mentorship Program pilot concluded; many participants volunteered to serve RSF in FY20
• Formed and successfully recruited the Fulfillment Standing Group

Much gratitude to all the mentors and mentees, and special thanks to Erin Bledsoe, Central Washington University, for serving as the Mentorship Contact in FY19. Many thanks to members of the Summit Standing Group who finished out their terms this year: Stefanie Gorzelsky, St. Martin’s University; Jada Pelger, University of Puget Sound (FY18 Chair), and Sagan Wallace, Concordia University (FY19 Chair). Your service has been most appreciated!
Shared Content and Technical Services Highlights
Mary Grenci, chair; Jesse Holden, Program Manager

Thanks to our leaders! Huge thanks to Mary Grenci (UO) for her leadership during the development of the Strategic Plan this past year. Mary tracked all the moving parts across SCTS and kept the Team progressing through completion of the implementation process. Thanks also to our group chairs: Cathy Chapman (SMU) and Linnea Marshall (UI), Cataloging Standing Group; Suzanne Sager (PSU) and Rose Krause, Norm Rules Standing Group; Andy Eickholdt (CWU) and Emily Miller-Francisco (SOU) Ebooks Standing Group.

Cataloging: The Cataloging Standing Group (CSG) has been working to develop best practices across the Alliance and standardize usage of MARC fields. The Group is preparing the release of a ready-reference guide to the use of faceted terms.

Normalization Rules: The Norm Rules Standing Group (NRSG) continues to optimize discovery by prioritizing, testing, and implementing member-requested norm rules. They recently concluded a renorm/reindex process in the Premium Sandbox with the assistance of Network Zone Manager Lesley Lowery. The renorm/reindex of the production environment will run July 29 to August 2.

E-Resources: Did you know that the Alliance centrally manages more than 150 e-resources on behalf of 100 libraries (including affiliates)? As part of the renewal process, Alliance staff reviews all renewal offers and routinely pushes back on price increases greater than 3%.

This year, the Alliance participated in major negotiations with ACS and Oxford, which resulted in significantly revised renewal offers. Remember that you can send feedback regarding new offers, renewals, or other e-resources concerns to Jesse Holden.

A major effort to load licenses, amendments, and related documents to the “Subscription Summaries” pages on the Alliance Web site was completed this winter.

The Alliance began implementing a consortium-scale ERM called “ConsortiaManager.” This will streamline the Alliance renewal process and improve transparency for subscribers. It is expected that this system will go live with September renewals.
Jill Emery (PSU) was appointed to chair The E-Content Group (ECG), which will launch as part of the new Alliance Strategic Plan. The ECG will work in an advisory capacity to review Alliance pricing, license terms, and other consortial aspects of the e-resources environment (e.g., Open Access).

**Ebooks:** The Alliance planned to continue with the Wiley “Usage-Based Collection Management” (UCBM) and Oxford Scholarship Online plans in fiscal year 2020. The Ebook Standing Group (ESG) recommended Oxford backfile content as a “Bridge Plan” purchase to replace the Taylor & Francis (T&F) pilot in 2019. The ESG issued an RFP for a plan to permanently replace the T&F plan starting in fiscal year 2020. The Group will be evaluating responses and making a recommendation this summer.

Thanks to Michelle Weston (WWU), who is rolling off the Group at the end of June after leading the Group’s statistical analyses for several cycles. Tom Larson (PSU) has also been a long-standing contributor to the Group, especially concerning matters related to record management.

**Network Zone Manager Lesley Lowery’s Work in the NZ:**
Database improvements: cleanup of 4,000 multi-match errors. Marked 336,700 “bound-with” records and developed maintenance process - First annual update will be run the last weekend in June. Removed 1.2 million “childless bib” records from the NZ. Legacy OCLC “delete” files have been processed. “Cold case corner” review of legacy cases during SCTS Open Calls. Led a project group to determine the utility and feasibility of centrally loading GPO bib records.

**Systems Highlights**  
*Paul Ojennus, chair; Bryan Vogh, Program Manager*

- Completed strategic plan implementation process;
- Continued work on Primo Central Package management, including new customizations “Show/hide advanced search on mobile”, “OA/peer-review modal windows”, and “Favorites sign-in warning”
• Formed and recruited for the new Central Analytics Standing Group (CASG)

• Provided leadership for the 2019 New Enhancements Request System (NERS) Alma Enhancements cycle

Thanks to Jeremy McWilliams (Lewis & Clark College), who will be cycling off the Primo Customization Standing Group (PCSG) this summer.

Unique and Local Content
Anne Jenner, chair; Laura Buchholz, interim coordinator

• Completed strategic plan implementation process; continued work on Archives West, ArchivesSpace, unique materials in the SILS, OER
• ArchivesSpace migration completed; included onboarding of Oregon Historical Society and SOU
• Organized and hosted full-day A&M program meeting in Bozeman Montana

Many thanks to the ACM and UMSILS working group members for their excellent service during this period without a full time Program Manager. ACM members are: Steve Duckworth, Rachel Thomas, Austin Munsell, Conor Casey, Alla Powers, and Zach Selley. UMSILS members are: Crystal Rodgers, Philip Vue, and Ryan Hildebrand. Thank you!

Alliance Response to NWCCU Revised Accreditation Standards

This spring, the Alliance Board coordinated a response to a draft of revised accreditation standards issued by the Northwest Commission on Colleges and Universities (NWCCU). The draft significantly reduced existing accreditation standards for libraries. The Orbis Cascade Alliance Board believes it is important for the Alliance to participate in the current standards review, and to use the collective voice of our member institutions to advocate for continued emphasis in the accreditation process on the critical role of libraries in academic institutions. The focus of the collective response is on advocating to restore library instruction to the standards.
Michele Burke of Chemeketa Community College shared the following acknowledgment: “Starting with the NWCCU’s first call for input, Alliance leaders have consistently demonstrated diplomacy, eloquence, and tenacity articulating concerns and recommendations around representing libraries and information literacy in the revised standards. Advocacy coordination takes an enormous amount of time and communication, and Michelle Bagley, Natalie Beach, Susan Barnes Whyte, Isaac Gilman, and the rest of the Alliance Board deserve special recognition for their energy and good work coordinating a response on behalf of member libraries, and for broadly including other library partner groups in the effort. Our strength goes beyond resource sharing.”

**NWCCU review timeline**

June 2019: Final recommendation sent to the Commissioners  
July 2019: Call for comment period for second draft of Revised Standards  
August 2019: Commissioners vote on Revised Standards; NWCCU members vote on Revised Standards  

NWCCU has shared feedback received from the Regional survey and Town Halls in advance of the recommendation to the Commissioners. The Board will continue to monitor the process and keep Alliance members informed about the final version of the library criterion in the revised standards.

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**Ex Libris News and Notes**  
*Bryan Vogh*

**Summary of Accepted NERS Enhancements for Primo**

Primo NERS voting did not have a second round this year, so the six items below will be developed in the next cycle:

**6125 Sticky facets by default:** Create a configuration option (or force by default)  
Primo’s facets be sticky by default when a user selects a facet in their search. Once a new search is initiated, the sticky facets should be removed, but once a user selects facets again, they should be sticky.
6230 Enable option to favour latest edition of bibliographic work to top the FRBR group. When records for editions of a bibliographic work are FRBRised, customers can choose whether to display a “Generic Record” or to have a “Preferred Record” front the group in the results listing.

6190 Export search results to Excel/csv. When a user gets several hundred search results, they need to be able to download a list of the entire set of results.

6184 Make it possible to override Start Harvest date for Delete and ReLoad pipes. Each time a Delete Data Source and ReLoad pipe is run, the "Stop harvesting files/records from" value in the pipe setup changes to the date the pipe was run. We would like to see an option to either set the start harvest files date to a static date or to suppress the start harvesting feature entirely for this sort of pipe.

6290 Improve NUI user actions on mobile devices. Actions such as navigating and using the 'Send to' menu, Expanding and collapsing OvP blocks, and applying filters are unreliable and slow on mobile devices.

Additionally, ExLibris has agreed to develop enhancement 6341 “Set automatically the cursor in the search box”, after verifying that it does not adversely affect accessibility requirements.

Update on Primo VE

After consultation with Ex Libris executives at the ELUNA meeting, the Alliance will not be moving to use Primo VE in the near term. We had a number of conversations with current users, and there were concerns that at ELUNA sessions that make this seem like the prudent course of action at this time. We will reevaluate the use of Primo VE as it is further developed by Ex Libris and share the results of the evaluation with the Alliance members as it becomes available.

Alma Premium Sandboxes

Ex Libris has provided the instructions for the setup of the new Alma premium sandboxes after they are refreshed each February and August.
WWU and WU staff will need to check that the patron and financial data that is to be removed has indeed been removed before we begin using the new sandboxes. Alliance Central staff will need to make configuration changes to enable testing of resource sharing requests.

For Resource Sharing testing, there is still an issue with the holdings on the new Alma premium sandbox not being reduced down to only the libraries with premium sandboxes. We have a Salesforce ticket open and hope to have this issue resolved soon.

The institutions that have Alma Premium Sandboxes may also want to point their Primo sandboxes to use the new Alma Premium Sandboxes. Documentation on how to make this change has been sent out to the Systems and Discovery communities. We have until December 2019 to fully make the transition to the new Alma Premium Sandboxes but would like to begin testing the new premium sandboxes while we still have access to the old sandboxes for reference/backup.

**New Ex Libris Resource Sharing Project - Next Gen RS**

If you are interested in finding out more about the Next Generation Resource Sharing initiative that Ex Libris announced at the ELUNA meeting you can join a mailing list by sending an email to nextgenrs@exlibrisgroup.com. The Alliance is not currently positioned to take part as a development partner for this project, but we will monitor and share information with members.

**Ex Libris Idea Exchange**

As of June 1st, users of the Ex Libris Idea Exchange have been given additional votes. Everyone now has five additional votes for Primo and five for Alma - a total of 25 votes for each product. Alliance staff and program areas will be reviewing and
advocating for specific ideas that will help the Alliance move its strategic agenda forward. We currently have the following ideas posted on the exchange. Please consider allocating three votes to help us move forward.

**Alma**: Ability to find bib records with attached PO lines but no inventory

**Primo**: Improve logic for Consortial/AFN and ILL requests

**My Favorites**: while pinning item in Primo, allow user to choose label: https://ideas.exlibrisgroup.com/forums/308176-primo/suggestions/38006212-my-favorites-while-pinning-item-allow-user-to-ch

We will be working out the details of strategic work with Idea Exchange in the coming months. Look out for updates!

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**Suggestions for the Alliance Newsletter?**

Look for another issue of our newsletter in fall 2019 - In the meantime we are eager for any feedback about member communication. Please contact Maija Anderson, Interim Executive Director at manderson@orbiscascade.org with your ideas and questions.