



Alliance News - Fall 2019

Greetings from the Board Chair and Interim Executive Director!

Natalie Beach (Chemeketa Community College)

Maija Anderson (Orbis Cascade Alliance)

Fall is here, and we hope all of our colleagues are getting a great start to the academic year. It was wonderful to see so many of you learning, sharing, and networking at the **Alliance Summer Meeting** in Tacoma. We are grateful to our wonderful Program Committee: Elizabeth Duell (Alliance, chair) Mary Greci (UO), Molly Gunderson (PSU), Merri Hartse (EWU), Kate Jones (SOU), Holli Kubly (UO), Jada Pelger (UPS), and Pam Pierce (OHSU). The Program Committee conducted a meeting survey that was completed by 41% of attendees. 90% of respondents rated the meeting "excellent" or "good," and 76% said the content will help them in their daily work. There was both appreciation and ongoing demand for more in-depth, face-to-face training, as well as unstructured networking time. Thanks to all of our teams, central staff, presenters, and attendees for contributing to a successful meeting! In fiscal year 2020, Alliance teams will be hosting focused, stand-alone meetings. We also look forward to the next Summer Meeting in FY21!

The recruitment for the new **Executive Director** is moving right on schedule. The committee is completing an initial review of applicants, and finalist interviews will be scheduled for mid-October. More information will be coming out very soon. The search committee is Xan Arch (UP, chair), Dalia Corkrum (Whitman), Megan Dugan (MHCC), Ben Hunter (U Idaho), Ryan Ingersoll (George Fox), and Betsy Wilson (UW).

In other staffing news, our renewed search for a **Program Manager for Unique and Local Content** yielded a very strong candidate pool. The search committee is Maija Anderson (Alliance, chair), Trevor Bond (WSU), Liza Harrell-Edge (TESC), Cheryl Oestreicher (Boise State), and Rachel Thomas (George Fox). Video interviews are scheduled for early October. Our former **E-Resources Specialist**, Angeline Schoonover, has settled into her new position at Reed College - congratulations Angeline! We are currently reviewing applications for the position. Our search committee for the **Program Manager for Discovery and User Experience** reached consensus that our candidate pool was not strong enough to move forward with recruitment. We are collecting feedback on the position and our recruitment strategy before re-launching the search. Our search committee was Bryan Vogh (Alliance, chair) Anne Pepitone (UW), Bill Kelm (Willamette), Stephanie Michel (UP), and Rami Attebury (U Idaho). We appreciate their thoughtful and rigorous review of candidates.

Over the summer, the Board assembled two task forces to conduct important Council-level governance work, beginning this year. The Governance Task Force will assess our governance structures and clarify the roles and responsibilities of Board, Council, and Alliance central staff. Their work will include a review of our bylaws and election process. The Task Force is Natalie Beach (Chemeketa Community College, chair), Maija Anderson (Alliance), Chelle Batchelor (WOU), Amanda Clark (Whitworth), Mark Dahl (Lewis & Clark), Isaac Gilman (Pacific), and Mark Greenberg (WWU). The Dues Allocation Task Force will analyze the monetary value of Alliance membership to member institutions, and assess the current dues allocation model in light of members' perception

of value. The Task Force members are (Dena Hutto (chair), Maija Anderson (Alliance), Faye Chadwell (OSU), Tina Hovekamp (COCC), Rebecca Lubas (CWU), and Amy Stewart-Mailhiot (Saint Martin's).

We have also updated our **Finance Team** membership: The roster now includes Dena Hutto (Chair), Maija Anderson (Alliance), Michelle Bagley (PCC), Tom Bielavitz (PSU), Dalia Corkrum (Whitman), Mark Greenberg (WWU), Craig Milberg (Willamette), Sarah Watstein (Seattle U), and Amy Wheeler (Alliance).

This fall, we will also see our first reports on the initiatives called for in our new **strategic plan**. Results will be shared in team and Council communications, and on the Alliance website. Read on to find out about some of the exciting work our teams are doing!

Alliance Teams - What's New this Fall!

In our summer newsletter, Alliance teams reflected on great work accomplished in the last fiscal year. This time around, we asked our teams to share some of the projects they're excited about launching this fall.

Discovery and User Experience

The Discovery and User Experience (DUX) Team is anticipating a number of exciting projects in FY20. DUX's charge is to support Alliance libraries in the improving and using discovery systems and services.

In keeping with this, we are particularly looking forward to:

- Working with the Discovery Training Coordination Standing Group (DTCSG) to plan both online training, Open Call demos, and an in-person UX/Accessibility Day. If there's something you'd like to see DTCSG tackle this upcoming year, let us know using our request form or by voting for a proposal on our Trello Board.

- Supporting User Experience Testing with the collection and sharing of personas. If you have a persona you'd like to share, fill out our form.
- Developing ways to support Alliance members' Accessibility work.
- Continuing the work of the Primo Release Testing Standing Group (PRTSG) to support Alliance libraries in testing Primo Releases.

Resource Sharing and Fulfillment Team

The RSF Team is currently recruiting for a new member! Do you know someone who would be a fabulous addition to our team? How about you? Would YOU be a fabulous (or even marvelous) addition to our team? Then nominate yourself or others using this handy survey. On our team website you'll find more information about the team's charge and scope. The deadline to nominate your colleagues or yourself is the end of the day on October 4, 2019. We look forward to hearing from you and meeting our new team member!

"Anonymous Ask" feature: We realize that bringing your question up in an open call can be a little intimidating (although we're all very friendly and eager to interact). If you have a question or issue you'd like some help with but are not yet fully comfortable speaking in front of the group, you'll have the option of sending us your input through an "Anonymous Ask" Google form. The link will be available from the RSF Team page on the Alliance website and will be completely anonymous. Please don't expect replies individually, as we won't know who you are! But, if the question or idea is intriguing, helpful or otherwise endearing, we'll add it to our open call agenda and give it some discussion. Tune in for answers and *don't be shy!*

The Fulfillment Standing Group is our newest group in RSF. They are finalizing fabulous course reserve documentation that was begun by the previous project group, locating the correct contacts for each member institution in the fulfillment arena, and designing a helpful website that they are ready to launch! Be on the lookout at an upcoming open call for a sneak peak at their accomplishments and to hear how your library can benefit from and support their ongoing work.

Shared Content and Technical Services

The Ebooks Standing Group is wrapping up the review of the RFP responses for a new ebook plan to replace Taylor & Francis. The Wiley UBCM plan has been extended for a fourth year and the Oxford Scholarship Online (OSO) plan (without the Partner Presses) is also continuing. The 2019 ebook “Bridge Plan” will provide the 2016 and remainder of 2017 OSO publications as well as extended access to OSO backfiles through June 2020, after which the highest-used pre-2016 backfile titles will be purchased for the Alliance collection. The ebook section of the Alliance site is currently being updated with new plan details. (A reminder that this section is now password-protected. Please contact Jesse Holden for access.)

The E-Content Group is completing its recruitment campaign. This new group will be chaired by Jill Emery (PSU) and initially advise on issues related to licensing and pricing of Alliance e-resource subscriptions. Curious about this group’s charge? It’s posted here.

The Cataloging Standing Group is pleased to announce the release of the document “Use of Faceted Terms in Cataloging: Ready Reference Guide for Orbis Cascade Alliance Members.” This document describes best practices for incorporating faceted terminology in MARC 21 bibliographic records in the Orbis Cascade Alliance Network Zone. CSG recognizes that not all catalogers will have the training, authorization, or time to enhance WorldCat master records, but for those catalogers whose workflow can include incorporating these new vocabularies to improve resource discovery, we hope that this document proves helpful. The group plans to present this document at an upcoming Technical Services Open Call. CSG will revise the document as needed, including as national-level standards change, and also plans to release ready reference guides for specific types of resources (e.g., visual materials and literature) in the future. Please share your feedback with the ts-discussion list, or feel free to contact the CSG chair Cathy Chapman (cchapman@stmartin.edu) directly with your questions and comments. Happy cataloging (and faceting)!

Systems Team

The new Central Analytics Standing Group (CASG) began work in May. The members are Kevin Edwards (PCC), Doug McClay (Walla Walla), Karen Stephens (CWU), LaVonna Sydow (Reed), and Jian Wang (PSU). They started with a survey to understand Alliance member needs. In response to survey results, which indicated the importance of training, they're starting by assessing current training material and documentation. Upcoming projects will include creating online videos and working to improve annual statistics gathering in Analytics. The group will also share tips and tricks for Analytics in a variety of Alliance forums.

Unique and Local Content Team

The Unique and Local Content (ULC) team will be pursuing a wide variety of initiatives this fiscal year, with a focus on improving the systems we currently maintain for the alliance and investigating new forms of institutional collaboration and resource discovery. ULC is responsible for supporting both the Archives West finding-aid discovery platform and the ArchivesSpace archival information management system that feeds into it. ULC team members are currently collecting information via an Alliance-wide survey on ways to improve both systems and the workflows that prepare the content ingested. We also encourage the use of the ULC's Problem Report Form for anyone interested in detailing specific problems.

Other members of the ULC team are investigating the possibility of creating a shared Institutional Repository (IR) for Alliance institutions and the best ways to make Open Educational Resources (OER) discoverable. The shared IR group is building off of initial investigations conducted in FY 18 that surveyed Alliance institutions about desired features and evaluated several repository platforms. The OER work brings together a number of ULC groups, including those investigating unique materials in the SILS, Dublin Core best practices, and OER community building, in order to investigate the best ways to make OER content discoverable in the catalog and online.

Ex Libris development projects

On August 16th, the Alliance met with Ex Libris in Portland for a full-day discussion of the scope and outcomes of four development projects called for in our current contract. The Alliance was represented by Maija Anderson, Jesse Holden, Lesley Lowery, Lori Hilterbrand, and Bryan Vogh (Central Staff) as well as Natalie Beach (Board Chair). Ex Libris was represented by Jane Burke (VP of Strategic Initiatives) and Carmit Marcus (Director of Project Management and Partnerships).

We spent intensive time discussing each of our initiatives. For our "TBD" fourth topic, central staff proposed an initiative focused on improving fulfillment and resource sharing workflows. For each initiative, Alliance staff described opportunities and desired outcomes, drawing on member feedback and documented use cases. Ex Libris asked thoughtful questions and sought clarification on complex issues.

The next step is for Carmit Marcus to create refined, actionable scope documents for each initiative. Program staff are continuing to solicit member feedback and develop detailed use cases to support Carmit's work. Ex Libris will also be returning to Portland later this year for a member-driven kickoff meeting.

More news about these projects will be shared on our Development Projects Hub, and by Alliance staff and teams.

Best Practices for Salesforce Case Management

This spring, central staff engaged in several discussions with Ex Libris's North American Support managers about how Alliance members can get better results from their Salesforce cases. As a result of these discussions, a new "Best Practices for Salesforce Case Management" document has been approved by central staff and Team chairs and is now available on the Alliance website. It is located on the Systems Documentation page under the "General" heading, and on the Technical Services Documentation page under the "Best Practices" heading.

The document is divided into a checklist form that can be used as a quick reference, as well as a narrative form that contains more detail on each point. Questions about the document can be sent to Lesley Lowery, Network Zone Manager, at (llovery@orbiscascade.org).

Thank you for your feedback!

We are eager to hear your questions and ideas about the newsletter and other Alliance communications. Please send your thoughts to Maija Anderson, Interim Executive Director, at manderson@orbiscascade.org

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