



Orbis Cascade Alliance Newsletter - Spring 2020

Wed, Jun 3, 2020 at 11:12 AM



Alliance News - Spring 2020

From the Board Chair and Executive Director

Natalie Beach and Kim Armstrong

What a 2020! We hope this finds you all healthy and coping with the challenges of our changed operations across the membership.

The Alliance Board and Council have adapted our operations to keep the momentum of our programs, services and strategic initiatives on track, while being responsive to remote working and member needs. The March Council meeting was cancelled and replaced with an open forum, so that leaders could gather remotely to share information about campus and library closings and shifting staff to teleworking. The FY21 budget was passed successfully, the [Board for FY21](#) has been elected, and Council made the decision for the Alliance to go live with the Ex Libris Central Discovery Index (CDI) on July 27. Summit and courier operations were suspended as of March 23, and courier service was reinstated on an opt-in basis effective May 18.

In order to stay abreast of the rapid changes and to keep Alliance work on track, the Board is now meeting weekly, and Council is meeting monthly, instead of the traditional three times per year. Council Open Forums have been planned for May and June to provide time for information sharing and guidance to the Alliance on priorities for our work going forward. It has been encouraging that Teams and Groups continue to have full participation in the important work on our strategic initiatives, and highlights of that are included in this newsletter. The Alliance staff have put together a [COVID-19 resource page](#) linked from our website, to provide best practice reading on: safe materials handling, reopening libraries, e-resource access, and remote work resources.

All of the Alliance summer meetings have either been postponed or converted to virtual meetings. Watch for announcements from the

sponsoring Teams. With a heavy heart we say farewell to our colleagues at Concordia University, and thank them for all of their contributions to the Alliance.

Finally, a hearty thanks to our **Departing Board and Team Members!** These last months of service to the Alliance have required exceptional adaptability and commitment.

Board of Directors: Dena Hutto (Reed); Amanda Clark (Whitworth); Betsy Wilson (UWashington); Ben Hunter (UIdaho)

Discovery and User Experience: Aja Bettencourt-McCarthy, Chair (OIT); Kathleen Veldhuisen (Chemeketa); Marianne Bracke (Whitworth)

Shared Content and Technical Services: Rachel Arkoosh, Chair (Pacific); Cathy Chapman (SMU); Emily Miller-Francisco (SOU)

Resource Sharing and Fulfillment: Sagan Wallace, Chair (OSU); Kate Smith (UO)

Systems: Radmilla Ballada (Clark); LaVonna Sydow (Reed); Doug McClay (WallaWalla); Jeremiah Kellogg (EOU)

Unique and Local Content: Eva Guggemos, Chair (Pacific); Liza Harrell-Edge (TESC); Sarah Seymore (UO)

Alliance Team Highlights

Our teams were busy all year carrying out essential Alliance work, and implementing the new strategic plan. When COVID-19 hit, many teams and working groups pivoted or re-focused projects so they could respond to community needs while also managing local issues at their home institutions. Our team chairs showed admirable leadership and dedication to service during uncertain and stressful times.

Discovery and User Experience

The DUX Team launched the Accessibility Standing Group this year and was impressed with the level of interest in this work among Alliance members. The group has begun reaching out within the Alliance and to other consortia and we are excited for their upcoming work.

Working with the Discovery Training Coordination Standing Group and the Systems Team, the DUX Team was able to pivot from a planned in-person summer event to a virtual joint SYS/DUX event scheduled for the last week in July. The Team is excited about this opportunity for professional development and networking and looks forward to seeing you on Zoom!

The DUX Team has been working to ensure that their Open Calls remain a valuable source of information and community for DUX Reps and the DUX community. With the help of the Primo Release Testing Standing Group and the Discovery Training Coordination Standing Group, the DUX Team has been able to share valuable information during calls. The Team has also responded to the move - for many in the DUX community - to remote work by providing time to come together and share tips and strategies during monthly calls.

Resource Sharing and Fulfillment

In addition to monthly open calls and edited release notes, the RSF Team

has primarily worked on reviewing our Summit policies. We had a 100% response rate to our fall survey looking at satisfaction with our Summit loan lengths and renewal policies. Thanks to your input we have convened the Summit Policy Testing Project Group (SPTPG), whose members are testing our options for adding renewals to our workflows.

The Summit Standing Group has completed 12 months of [regression testing and documentation](#), and is now working closely with SPTPG to design the technical testing of renewal configurations.

The Fulfillment Standing Group has drawn together [fulfillment documentation](#). Most recently, they have pivoted their work to compiling documentation which will be most useful for member libraries to use in their work amidst COVID.

While all of our regular tasks have continued, the RSF Team and groups have taken time to take care of themselves and their families during our pandemic response. We applaud the support they have given to their communities, and the value of the time they have taken to step back, re-assess and recharge their abilities to serve our member libraries.

Shared Content and Technical Services

The new electronic resource management system (ERMS) for the Alliance, ConsortiaManager, went live in May for processing orders and renewals effective July 1. This implementation is an element of the “Streamlining Licensing & Invoicing” initiative, which is part of the Alliance strategic plan.

The Ebook Standing Group (ESG) has been busy finalizing the Cambridge University Press EBA STM package, which provides access to nearly 10,000 e-book titles. Not only will this purchase provide needed e-content during these unique times, but Alliance schools will also have the option of purchasing additional titles for their institution at a 10% discount rate. The ESG has also been wrapping up purchases through our Usage-Based

Collection Management (UBCM) plan through Wiley. The Wiley plan becomes a front-list purchase collection, effective July 1.

The Cataloging Standing Group (CSG) has released a new [best practice for reporting duplicate records](#) and a [revised provider-neutral records policy](#). Their recent [discussion paper on an alternative to LCSH's "Illegal Aliens" terminology](#) has been used this spring in UW iSchool's "LIS 531: Catalogs, Cataloging & Classification." The group is currently authoring a recommendation to the Alliance Council regarding next steps on this issue.

The E-Content Group (ECG), about halfway into its inaugural year, is completing a best practices document for Alliance licensing. They anticipate that this document will be available for community review and input in the near future.

The recruitment for SCTS teams brought in a large group of talented people. A big thank you in advance to all nominees who considered serving!

Systems

It was a busy couple of months for the Systems working groups. As institutions were closing their campuses, it was necessary to convey important information about library services to students, faculty, and staff. In response to this, the Primo Customization Standing Group (PCSG) created a [CSS based emergency banner](#) for institutions to use in their Primo instances, as well as a [JavaScript based customization](#) that allowed for the use of hyperlinks. PCSG Chair Jeremiah Kellogg (EOU) also worked with Bryan Vogh (Alliance) on finalizing the acquisition of a server that can be used for customizations that require server-side processing. This server will be an amazing resource for the Alliance.

Prompted by the DUX Team, the Central Analytics Standing Group (CASG) created a new guide to [Primo Analytics](#) pointing to updated

training materials and numerous examples. Group chair LaVonna Sydow (Reed) also created two reports that could be useful during the COVID-19 stay-at-home order. One helps predict which reserve books might need to be scanned, and another estimates shipping costs for items being returned.

System's Team chair Bill Kelm (Willamette) worked with Bryan Vogh to coordinate the Alma side of our NERS enhancement voting. The COVID-19 epidemic caused some delays in voting, but after some quick work by the [Alma Enhancements Project Group](#) we were able to recommend four enhancements to members. The second round of voting will occur later this summer.

Unique and Local Content

On May 22nd, 50 attendees participated in the all-virtual 2020 Archives and Manuscripts service meeting. This is record attendance for the A&M meeting, and one of the largest virtual events the Alliance has held! Attendees discussed the prospect of a national finding aid aggregation, learned about new developments and services, and enjoyed some virtual networking time. Our program committee was Hannah Crummé (chair, Lewis & Clark), Maija Anderson (Alliance), Eva Guggemos (Pacific University), Crystal Rodgers (University of Washington), Rachel Thomas (George Fox University).

To support members during COVID-19 response, the Unique and Local Content Team began hosting monthly open calls this spring. We've held well-attended calls on adapting to remote work, and how archivists are documenting the pandemic's impact on their campus and community. The first two calls yielded engaged discussion and a wealth of ideas, and we're excited to continue hosting open calls in the future.

The Unique Materials in the SILS Standing Group finalized Alliance Best Practices for MARC Records for Archival Materials. The UMSILS group

solicited and integrated feedback from the Cataloging Standing Group, ULC Team, and broader ULC community, creating a set of clear guidelines that members can use to create collection-level MARC records for archival materials. The UMSILS group is Crystal Rodgers (Chair, UW); Ryan Hildebrand (UO), and Philip Vue (UP).

News in Brief

Central Discovery Index (CDI)

Alliance members and central staff continue to prepare for Ex Libris's switch from Primo Central Index (PCI) to Central Discovery Index (CDI). CDI will replace the Primo Central Index at all institutions. The biggest changes to expect are a move from grouped to merged records, more granular resource types, and expanded content coverage. Alliance central staff have prepared an [FAQs document about CDI](#), and Ex Libris provides [CDI documentation and training](#). In May, Alliance Council approved July 27, 2020 as the go-live date for CDI at all institutions.

DUX/SYS Joint Programming this Summer

The DUX and Systems Teams are joining forces to hold an all-virtual educational program this summer. The theme is Coming Together, Apart, and events will be scheduled between July 27-31. In libraries, we need to work together intentionally, even more so while we're working remotely. Topics will focus on collaboration in our current environment, with an emphasis on solving problems by working across the library, across campus, or across institutions. The [call for proposals](#) is open until June 10. The program committee is: Laura Baird (co-chair, Pacific); Hilary

Robbeloth (co-chair, University of Puget Sound); Aja Bettencourt-McCarthy (OIT); Marianne Bracke (Whitworth); Jeremiah Kellogg (EOU); Bill Kelm (Willamette); Hui Zhang (OSU); Maija Anderson (Alliance); Bryan Vogh (Alliance).

Concordia University Closure

Concordia University announced earlier this year that it would be ceasing operations after the Spring semester 2020, and ending their relationship with the Alliance effective June 26. Concordia joined the Alliance in 2008, after completing an application and hosting a Board site visit, with then University Librarian Brent Mai. Concordia staff have been active contributors to the work of the Alliance through Team and Group membership, and leadership in Council. The Alliance extends our best wishes to Kim Read, Nancy Hoover, and all of the staff as they move through this transition. Thank you Concordia for all you did to enhance the Alliance!

ConsortiaManager Implementation

The new consortial electronic resource management system (or ERMS) for the Alliance, ConsortiaManager (CM), went live in May for processing orders and renewals effective July 1. This implementation is an element of the “Streamlining Licensing & Invoicing” initiative, which is part of the Alliance Strategic Plan.

The Alliance joins consortia worldwide in using CM to centrally manage their e-resource subscriptions. This investment will increase efficiency and transparency for members and the Alliance staff. It will provide real-time information about accounts, while giving members the ability to update their local information.

Fair Use & Copyright in a Public Health Emergency

As colleges and universities across the Pacific Northwest have gone to remote teaching for spring term and beyond, questions about how to legally and ethically provide access to learning materials have naturally come up.

Copyright First Responders Pacific Northwest, an Orbis-Cascade Alliance sponsored group of librarians committed to providing peer-to-peer copyright support for librarians in our region, hosted a discussion and Q&A session on May 19. Rachel Bridgewater (PCC) and Sue Kunda (WOU) facilitated the session held on May 19. The recording can be viewed [here](#). The May session was a follow-up to the, “Yes, You Can Scan that Textbook” webinar, [available here](#).

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