

Orbis and the Founding of the Orbis Cascade Alliance A Decade of Academic Library Collaboration in the Pacific Northwest, 1993-2003.

By Lynn Chmelir, April 21, 2015

In 2003, two existing academic library consortia in the Pacific Northwest, Orbis and Cascade, merged to establish the Orbis Cascade Alliance. Since then, the membership in the Alliance has grown to 37 academic libraries in Oregon, Washington, and Idaho that serve over 275,000 FTE students. The mission of the Alliance, as re-articulated in 2014, is to enable member libraries to advance institutional missions through collaboration and innovation.¹

Origins of Orbis

The Orbis consortium was established in Oregon in 1993, building on that state's long tradition of substantive library cooperation. In the early 1990's, academic librarians had been working together in a variety of venues. The eight library directors of the Oregon State System of Higher Education (OSSHE—later the Oregon University System—OUS) met regularly. The Oregon private college library directors also met frequently under the auspices of the Northwest Association of Private Colleges and Universities (NAPCU), a multi-state consortium of private college libraries. A thriving ACRL Oregon Chapter fostered communication and information sharing among academic librarians.

Orbis coalesced around the desire to improve resource sharing among Oregon academic libraries by creating a union catalog of holdings and an expedited borrowing service. In the early 1990's, Oregon librarians were watching the progress in Ohio where OhioLINK, a consortium of academic libraries, was implementing a statewide online union catalog based on software (later named INN-Reach) developed especially for it by Innovative Interfaces, Inc. (III).² Five publicly funded Oregon academic libraries collaborated for each to purchase an Innovative Interfaces integrated library system with the goal of later obtaining funding to replicate the OhioLINK union catalog for improved resource sharing. Gary Jensen of Western Oregon State College coordinated the purchase of the five separate III integrated library systems for

- Eastern Oregon State College (EOSC—later EOU),
- Oregon Institute of Technology (OIT),
- Southern Oregon State College (SOSC—later SOU),
- University of Oregon (UO), and
- Western Oregon State College (WOSC—later WOU).³

George Shipman, University Librarian at the University of Oregon, took the lead in preparing a grant request to the Meyer Memorial Trust for start-up funding for the union catalog. A request of \$242,502 for the union catalog was included in a UO grant request that also requested \$526,000 to renovate the Technical Services Center at the University of Oregon Library. The grant request, submitted in May 1993, included startup costs for those five OSSHE schools that already had local III systems and envisioned that the

academic union catalog, once established, could be expanded to include participation by the remaining three OSSHE schools as well as private colleges. Presidents of two private colleges with III library systems, Linfield College and Willamette University, provided letters of support for the grant proposal.⁴

The Meyer grant, which was successful, funded initial implementation of a union catalog for the five OSSHE schools. George Shipman also played a key role in establishing the Orbis consortium. Upon receipt of the Meyer Grant, he called a meeting of the five library directors on September 27, 1993 to begin planning for the implementation of the OSSHE Union Catalog. At the first organizational meeting, Alice Allen (UO head of technical services) was selected as the project leader and John F. Helmer (UO head of systems) was tasked to support the project. III had already been contacted as the vendor of the union catalog software. Although establishing the union catalog was the first order of business, it was clear from the start that substantive collaboration could provide mutual benefits beyond the catalog. At the first meeting there was initial discussion of governance, by-laws, expansion of the catalog to other OSSHE schools and private colleges, implementation logistics, a name for the catalog/consortium, and strategic planning for long-term goals.⁵

By the end of 1993, the two private colleges with existing III systems, Linfield College and Willamette University, became part of the union catalog project. Shipman, whose library included the largest collection serving the most students and faculty, continued to play a key leadership role in the development of Orbis until his retirement from the UO in 2000.⁶

The Orbis Union Catalog

In late 1993, the Orbis library directors met with staff from III to discuss system functionality: library users would toggle back and forth from local catalogs to the union catalog with one key stroke; the circulation functionality would include patron-initiated borrowing and a load-leveling system for loans; lending would be accomplished via temporary patron and item records that are cleared when items are returned; paging slips would be created for efficient item retrieval.⁷ It was agreed to proceed with a phased implementation, the union catalog software coming first and the circulation system later. Patron-initiated lending and borrowing were expected to improve the efficiency and cost-effectiveness of resource sharing among member libraries.⁸

John Helmer (UO) was tasked to follow up with III on functional requirements and Alice Allen (UO) agreed to work with the UO on sole source procurement and the logistics of establishing Orbis.⁹ In 1994, Nancy Nathanson was hired at the UO as the first Orbis employee and tasked to oversee implementation of the III union catalog software and loading bibliographic records from member institutions. A motion to support reciprocal borrowing among Orbis member libraries was passed by the Orbis Council, the name selected for the group of library directors. Bibliographic records for the seven Orbis institutions were loaded and the union catalog, called Orbis, went live for the public on March 8, 1995.¹⁰

Orbis Borrowing

By 1995, several additional Oregon private colleges were in various stages of procuring III software and joining the Orbis consortium: George Fox College, Lewis and Clark College, Reed College, and the University of Portland. Henry Yapple of Whitman College, a private college in Washington, arranged for Orbis representatives to meet in Walla Walla to share information about Orbis with directors of the six Washington public university libraries. At that time, the Washington public institutions were not interested in pursuing Orbis membership, but communication channels were opened. Whitman, however, applied for membership in Orbis and in 1995 became its first Washington member institution.¹¹

A \$404,000 grant proposal to fund the III module that supports patron-initiated borrowing was submitted to the Meyer Memorial Trust in 1996. Although it was not funded, the efficient circulation of library materials among members remained a very high priority for Orbis. At an ad-hoc Council meeting, members proposed to self-fund the project. Using the regular funding formula that was partly based on institutional size would make the cost prohibitive for some members, so it was proposed to divide the cost evenly among the twelve member institutions. At the following Council meeting a vote to self-fund automated borrowing with costs shared equally (\$21,500 each, payable in up to three fiscal years) passed unanimously.¹²

Patron-initiated borrowing became available to students and faculty at the twelve member institutions on March 10, 1997. Policies were adopted for a uniform loan period of three weeks and for uniform fines and replacement charges. Monographs from the circulating collections were eligible for loan to current students, faculty, and staff at member institutions. The Orbis Borrowing Committee was established to provide guidance for the program.¹³ The loan period was revised in 2001 to include a 3-week renewal for books and a short 3-day loan for non-book media materials to encourage lending videos and other formats.¹⁴

Timely delivery of books was essential to insure the success of patron-initiated borrowing. A goal for 48-hour delivery was established with nylon bags and preprinted address labels used for transport. Delivery was via the Washington/Oregon Ground Courier Service that already served many libraries in Oregon and Washington.

By 1998 the software was enhanced with load-leveling functionality: the III system software selected which copy to loan based on an Orbis-initiated hierarchy designed to facilitate equalization of lending and borrowing transactions among libraries. Priority codes among Orbis institutions were initially set in inverse order of historic net lending activity.¹⁵ The load-leveling software was quite successful in spreading the lending traffic as equitably as possible. For example, in July of 1998, the University of Oregon, with the largest collection of any Orbis member, was a net borrower.¹⁶ As time passed, adjustments continued to be made to optimize load balancing.¹⁷

The Orbis union catalog and patron-initiated borrowing and lending service proved immediately popular with students and faculty on member campuses. By 1998 the union catalog included 2,331,641 unique bibliographic records. About 73% of them were held by only one institution and 90% were held by three or fewer libraries. The III software worked very well and, during the first year of patron-initiated borrowing, 58,800 items were circulated via Orbis.¹⁸ In 1998/99, over 75,000 items were circulated¹⁹ and in 1999/00, 93,674 Orbis borrowing requests were filled.²⁰ That rose to 114,000 annual loans by 2002.²¹

Organization and Governance

“Orbis” was selected as the name for the consortium and the union catalog and borrowing service. “Orbis is a Latin word for objects of round or spherical shape, including heavenly bodies like the sun and the moon. Although it looks like it could be an acronym, it is not. Orbis was chosen for its connotation of a universe of knowledge, changing constantly as the world changes.”²²

Although creation of a union catalog served as the impetus to establish Orbis, broader goals were reflected in the first mission statement that was articulated: “The mission of Orbis shall be to support the research and scholarly programs of the participating institutions of higher education. Through the enhancement of existing library and information resources and services, the participating institutions shall provide an enriched learning environment for Oregon’s academic community.”²³

Wider Orbis participation required a funding plan for ongoing costs that was affordable for institutions of widely varied sizes and budgets. A funding formula was developed that included a fixed fee component and variable fees based on numbers of bibliographic records and institutional FTE. A reserve fund to be used for hardware replacement or expansion was also built into the funding structure. OSSHE committed to provide \$100,000 per year as recurring support for Oregon’s public institutional members.²⁴

Original membership criteria for the new consortium were discussed with consensus that 4-year schools in Oregon could participate if they had the necessary III technology. Very early, a description of the union catalog project and invitation to participate was sent to all Oregon not-for-profit baccalaureate-granting institutions.²⁵

A Memorandum of Understanding was drafted and adopted. The University of Oregon would serve as the contract provider and fiscal agent for Orbis. The governing body, the Orbis Council of library directors, would approve budgets and set policies, with each member institution having one vote. There would be an elected Chair and published *Bylaws*. Other groups could be established including a Technical Advisory Council. Orbis programs would include access to the union catalog, patron requesting of materials, enhanced electronic and physical document delivery, member access to electronic databases, and support for cooperative collection development.²⁶

In July 1995 Gary Jensen of WOSC was elected by Council to succeed Alice Allen as the first elected rotating Orbis Chair.²⁷ In 1997, *Orbis Membership Principles* were formally articulated that welcomed applications for membership from accredited not-for-profit baccalaureate, masters, or doctorate granting public or private institutions. No geographic limitations were imposed except for the ability to deliver library materials in a timely manner. Council affirmed that the basic unit of membership was the institution, with each library director having one vote on Council. New members paid up-front vendor costs to participate in the union catalog plus a consortium fee for training, profiling, and a contribution to an equipment reserve. The annual budget for recurring costs was distributed by formula: 20% as a base fee split equally among all members and 80% weighted according to student FTE.²⁸ In 2000, after discussing the possibility of moving to equal fees for all members, Council instead modified the formula to 40% split equally and 60% weighted by FTE.²⁹

Continued Growth and Development

The three OSSHE schools that did not immediately join Orbis lacked the III systems necessary for participation and did not initially pursue them. In 1996 Oregon State University (OSU) joined Orbis with the expectation that III would be able to integrate the III union catalog software with OSU's different library system.³⁰ Ultimately, integrating a different system was judged not to be a workable approach. Instead, OSU migrated to III and loaded records into Orbis in early 1999.³¹

In 1997, the University of Puget Sound became the second Washington private college to join Orbis. After much discussion about extending membership opportunities to community colleges, Central Oregon Community College became the first community college member in 1999. Shortly thereafter, two more Oregon private colleges, Pacific University and Marylhurst University, joined Orbis. Seattle Pacific University joined in 2000. In 2001, the remaining OSSHE schools, Oregon Health and Science University and Portland State University, became new Orbis members.³²

Continuing growth prompted further discussions in 1997 about Orbis' organizational structure. Council clarified that the Council Chair would be the principal person "who speaks for Orbis." Council also voted to create an Executive Committee consisting of Council Chair, Past Chair, Vice Chair/Chair Elect, and one at-large elected Council member. The annual Council retreat was established to provide opportunities for reflection and setting goals. Library staff were invited to attend what was to become an annual "summer meeting" to hear reports from Council and committee leadership and to share information and expertise.³³

John Helmer's role with Orbis was critical from the outset, but it was not clearly defined for some time. In 1997, Orbis agreed to reimburse the University of Oregon for the considerable staff time he was devoting to Orbis.³⁴ In late 1999, Council created the position of Orbis Manager and Helmer competed successfully for the position. Although the University of Oregon continued to be Orbis' fiscal agent, Helmer began reporting to

the Orbis Council. In recognition of the responsibilities of this position, Helmer's title was changed to Executive Director soon after his appointment.³⁵

Various institutions continued to express interest in joining Orbis. In anticipation of the membership becoming larger, the Task Force on Governance (TFOG) began to explore replacing the original "one member, one vote" model of governance with a representative system, possibly when membership exceeded 20 institutions.³⁶ In 2000, with quite a few likely new members on the horizon, governance issues were again under discussion and Council decided to devote its March 2001 Council retreat to legal and governance issues. Discussion at the retreat was wide-ranging and led to Council decisions to expand the membership of the Executive Committee by adding two new Member-at-Large positions. Council established new procedures to elect the EC Chair and members, with four rounds of voting to fill various positions and all Council members standing for election unless they opted out. Council decided to seek legal advice about establishing Orbis as non-profit tax-exempt corporation (501C3). It also created a task force to study the impact of membership growth and the potential inclusion of more diverse types of libraries.³⁷

In 2001, Council adopted a new two-day format for meetings with discussion of complex issues on day one and voting on day two.³⁸ The change in meeting format was important to continued consortial success since it helped Council to maximize discussion of complex issues and to focus decision-making.

At its 2002 retreat, Council considered the implications of admitting non-academic libraries to Orbis membership but reaffirmed that it would remain a consortium of academic libraries serving students, faculty, and staff of member institutions. The *Orbis Membership Task Force Final Report* noted that "the current number of members on council is at or near the tipping point and adding new members may call for a new form of governance," but it also noted that "Orbis functions as well as it does because all members have a seat at the table... Membership growth would result in a change in this grass roots governance." Therefore, the task force recommended that Orbis freeze its membership, but Council rejected that proposal. Instead, it recognized that the concept of affiliate membership to expand services to the wider library community while maintaining its current organizational structure might be pursued at a later time, although affiliate membership was never implemented.³⁹

Courier

The Washington/Oregon Ground Courier Service was initially administered by Cruse Consulting through a contract with Pony Express.⁴⁰ When Orbis libraries began to notice problems with the delivery service, Council agreed to do a "needs assessment" to review delivery requirements for the consortium.⁴¹ A transit time survey indicated that average delivery time was less than two days, but isolated problems were noted.⁴² By 1998, it was clear that the existing courier service was experiencing unacceptable price fluctuations and was in danger of collapse.

The courier served many libraries in addition to Orbis institutions, but there was no leadership group providing oversight. Orbis sent a questionnaire about courier service to 50 library drop sites and also convened a Library Courier Services Stakeholder Meeting at the Multnomah County Library in April. Representatives from more than 30 drop sites attended and gave broad support for Orbis to initiate a review of regional courier services and issue an RFP to administer a courier service on behalf of all participating drop sites. An RFP that required clear service expectations and firm prices was sent to potential delivery providers in May.⁴³

Croese Consulting, later called Library Materials Expeditors (LME), submitted the only bid and the new service, with Orbis serving as the contract administrator, began in July. The cost distribution formula for the service included a flat fee for each drop site that was not volume-dependent in order to encourage resource sharing. Non-Orbis members paid a small administrative fee and a user group was established to provide oversight of the project. Service improved and stabilized for a time.⁴⁴ The courier contract was renewed in 1999 and continued to serve libraries in Oregon and Washington.⁴⁵

In 2000, LME indicated that prices would rise by 50% to 100% and it appeared that their contract with Pony Express was not stable. With increased apprehension that the courier service might be forced to go out of business, Council tasked Helmer to issue an RFP for a new courier contractor. In fact, LME suspended Courier service in June of 2000 and Orbis implemented a contingency plan to ship materials via alternative methods. Meanwhile, the Washington State Cooperative Library Project (WSCLP) had decided to use the Orbis Courier rather than establish its own, so the suspension also affected delivery for Cascade, their newly established INN-Reach based union catalog and borrowing service.⁴⁶

Once again, LME submitted the only bid. An Orbis stakeholder advisory group judged that proposal to be non-responsive to the needs and objectives of the RFP and Council agreed to issue another RFP that received three responses. After review, Council asked Helmer to negotiate a new contract with Lantner Delivery Company, subcontracting with Western Parcel Express (WPX). The new Orbis Courier System was launched in November 2000, serving more than 50 drop sites.⁴⁷ In early 2001, the average delivery transit time was 1.4 days, with next-day delivery 62% of the time. A quarterly report on the service noted that over 40,000 packages, most including several items, were shipped via the courier at an average cost of \$.55. By late 2001 the average cost per package had decreased to \$.42, with the largest shipper (UO) reporting \$.13 per package.⁴⁸

Yet again, in 2002, the courier experienced a “meltdown.” WRX changed the nature of its business and Lantner quickly hired a new carrier, Consolidated Routing, a company affiliated with Marquis, a vendor that provided library courier service in the southwest. By October, the courier service had again stabilized.⁴⁹

Licensing Electronic Resources

By 1997, Orbis was having substantive discussions about playing a role in licensing electronic resources for member institutions and established a standing Electronic Resources Committee, later called the Task Force on Electronic Resources (TFER) and then the Committee on Electronic Resources (CER). Deb Carver of the University of Oregon played a key leadership role in establishing Orbis' licensing activity. Early cooperative projects to license *Project Muse* and *Encyclopedia Britannica* established a pattern of some members "opting in" to licensing opportunities but not requiring every institution to participate in every license. The goal of the licensing program was that every participating library should benefit from the collaborative purchase and the products should be as affordable as possible for all participants. Vendors quoted prices for the group of participating libraries as a whole and Orbis apportioned the costs among participants. Orbis also agreed to a role in administering licenses for non-member libraries in return for an administrative fee. A cost distribution formula was approved in 1998.⁵⁰

By 1999, Orbis maintained over 65 contracts for electronic resources serving some 100 libraries in the Northwest.⁵¹ Debi Place, an Orbis staff member hired in 1997, was given responsibility for managing the financial aspects of the licensing program that included invoicing libraries and paying vendors' substantial fees. In early 2000, Council approved hiring a part-time temporary Electronic Resource Assistant.⁵² In 2000, Orbis collaborated with WSCLP and NAPCU to purchase ebooks from netLibrary via a program called the Northwest Academic netLibrary Collection (NANC).⁵³

In 2001, as licensing activities increased, CER proposed creating a professional electronic resources "negotiator" position for Orbis. In 2002, Council tasked Helmer to develop a budget for increased Orbis staff support for purchasing electronic resources.⁵⁴

Other Initiatives

Groups were formed to look into cooperative collection development, article-level delivery, preservation, and government documents.⁵⁵ By 1999, principles for committees and task forces had been developed and several groups were working on a variety of projects. Annual reports were prepared by the Orbis Borrowing Committee, the Catalog Committee, the Collection Development Committee, the Committee on Electronic Resources, the Preservation Task Force, and the Government Documents Task Force.⁵⁶ Council actively reviewed committee membership and charges on a regular basis.⁵⁷

By 2000, Orbis was sponsoring a variety of continuing education opportunities both for staff from member libraries as well as the general library community. Orbis also facilitated collective purchases of III software upgrades for member libraries resulting in substantial savings.⁵⁸

Regional Library Services Center (RLSC)

As Orbis libraries were filling with paper collections, the idea of a shared storage facility for Orbis libraries began to receive active consideration. In 2000, Council appointed the

Shared Storage Task Force and approved its charge. After its progress report in 2001, Council decided to arrange a meeting with financial and planning officers at member institutions and named the projected storage facility the Orbis Regional Library Services Center (RLSC).⁵⁹ The UO submitted a capital budget request to the Oregon University System on behalf of Orbis for an RLSC planning grant in 2002; the Mellon Foundation was also approached for grant funding for planning.⁶⁰

In October 2002, Orbis received a \$37,630 LSTA planning grant for the RLSC. Council approved the site selection criteria drafted by the RLSC Task Force. Possible sites were at Linfield College in McMinnville, Marylhurst University near Lake Oswego, Oregon Health and Science University campus in Beaverton, and Oregon State University in Corvallis. Council also accepted the recommendation to create an RLSC collection development task force to make policy recommendations about ownership, duplication, physical attributes and condition of materials, and amount of use.⁶¹ Although the project continued to be pursued after Orbis merged with Cascade, in the end the RLSC was never built.

Founding the Orbis Cascade Alliance

Substantive discussion with the Washington public institutions had begun as early as 1995 and Orbis stayed in touch with developments in Washington State. By 1998, under the auspices of Interinstitutional Committee of Chief Librarians (ICCL), the six Washington public baccalaureate-granting institutions had instituted the Washington State Cooperative Library Project (WSCLP), to link catalogs, license shared databases, and support interlibrary borrowing and lending. WSCLP members included:

- Central Washington University (CWU),
- Eastern Washington University (EWU),
- The Evergreen State College (TESC),
- University of Washington (UW),
- Washington State University (WSU), and
- Western Washington University (WWU).

In 1998 Orbis extended a formal membership invitation and sent pricing information to the six members of WSCLP.⁶² WSCLP directors decided instead to create their own union catalog using INN-Reach, the same III software used by Orbis. The new WSCLP union catalog and patron-initiated borrowing service was called Cascade. WSCLP decided to use the existing Orbis Courier for delivery rather than establish a new courier of its own.⁶³ By 2002, the Cascade catalog included 4.4 million bibliographic records for over 11 million items. Over 39,000 items were lent in 2001/02.⁶⁴

It was understood that future linking of Cascade and Orbis might be possible.⁶⁵ In 1999, Orbis and WSCLP made a joint presentation at the Northwest III User Group Conference that explored the possibility of linking the two INN-Reach systems to improve interlibrary loan service. In 2001, Helmer and Orbis Chair Marilyn Mitchell (UPS) met with Betsy Wilson, the newly appointed director of libraries at the University of

Washington, and key UW staff. They discussed collaboration between WSCLP and Orbis and Wilson noted that the topic was on the agenda for the next meeting of ICCL. Orbis Council authorized the Executive Committee to set up a joint meeting of Orbis and ICCL that was subsequently scheduled for July. At the meeting the ICCL directors expressed a general interest in working with Orbis, but there were no specific activities planned.⁶⁶

At the 2002 Orbis Council Retreat, collaboration with the ICCL libraries was listed as one of Orbis' top priorities.⁶⁷ Since ICCL included some very large libraries, the change in the funding model to apportion 60% rather than 80% of Orbis fees by institution size made it more affordable for the Washington schools to consider membership. By July, the ICCL library directors had made a proposal to their provosts either to develop procedures and policies to add private colleges to Cascade or to establish "linkage" with Orbis. The provosts approved the proposal and ICCL set out to explore options. Orbis and Cascade staff members, chiefly Helmer and Nathanson from Orbis and Pam Mofjeld and Mark Kibbey of Cascade, began discussing technical issues of linking the III union catalogs. They realized that merging the two union catalogs into one would provide better functionality than linking two separate catalogs.⁶⁸ Council approved a recommendation from the Orbis Executive Committee to form an "Orbis and ICCL Discussion Group."⁶⁹

The discussion group, comprised of representatives from Orbis and Cascade libraries as well as staff from both consortia, met on October 11, 2002 and issued the *Proposal for an Orbis & Cascade Merger*. In a memo to the Orbis Council, John Helmer wrote: "Attached find a remarkable document proposing the merger of Orbis and Cascade and the creation of the Orbis Cascade Alliance (ORCA), a new consortium built on the policies, procedures, technology, and legal structure of Orbis. Although the details were only recently crafted, getting to this point represents a decade of work on the part of many individuals involved in both consortia. The proposal before you is the best we could have hoped for when Council identified 'Collaboration with ICCL libraries' as a top priority during last April's retreat. If approved this proposal will yield a union catalog of 22 million items, more than doubling the current Orbis system. Equally important, we will fully realize our goal of creating a two-state private and public academic library consortium."⁷⁰

Council approved the merger proposal unanimously. Later, the provosts of the Washington ICCL libraries also endorsed it.⁷¹ ICCL Chair Virginia Steel (WSU) and Orbis Chair Patricia Cutright (EOU) issued a press release announcing the merged Orbis Cascade Alliance, a new consortium that would serve more than 174,000 FTE students, faculty, and staff at 26 member institutions.⁷²

The merger proposal specified that the Orbis Cascade Alliance would be governed by a Council composed of directors from each of the member libraries. Orbis and Cascade ceased to exist as separate entities. The existing Orbis *MOU* and *Bylaws* were adapted with minor adjustments and the name of the merged consortium, "Orbis Cascade Alliance," replaced "Orbis" in the documents. The ICCL catalogs that comprised

Cascade were scheduled for loading into the Orbis INN-Reach system by the summer of 2003. The new merged union catalog and borrowing service was originally to be named “Orca,” although that later was changed to “Summit” when it was learned that a group of Washington community colleges already were using “Orca.” UO remained the fiscal agent. Start-up costs were divided equally between both consortia. Recurring costs were apportioned according to a formula—40% divided equally among all member libraries and 60% weighted according to student FTE. ICCL libraries contributed \$180,000 over 3 years to the existing \$1 million Orbis operating reserve fund. With the exception of not charging for traditional interlibrary loans of journal articles, the Orbis Cascade Alliance adopted current Orbis policies including no charges for patron-initiated borrowing via INN-Reach. The first meeting of the new Orbis Cascade Alliance Council was scheduled for April, 2003.⁷³

A Strong Foundation

During its decade of existence, Orbis succeeded in building a sound foundation for academic library collaboration in the Pacific Northwest. Starting with a founding membership of 5 publicly supported Oregon institutions, Orbis had grown to include 20 public and private institutions in Washington and Oregon. After the merger with Cascade, the new Orbis Cascade Alliance (or “the Alliance,” for short) served 26 institutions including each of the baccalaureate granting public institutions in Oregon and Washington, many of the private colleges in both states, and one Oregon community college. The new consortium emerged poised for future growth and accomplishment.

Many factors contributed to Orbis’ success. Consistently strong and dedicated leadership from member libraries fostered a collaborative spirit and institutional commitment necessary to accomplish the hard work of building and maintaining a successful organization and well-functioning programs. The Orbis staff, under John F. Helmer’s consistent and visionary leadership, was energetic and effective in accomplishing consortial goals. The governance structure, with every member library having an equal voice in decision-making, enhanced cooperation and member commitment to Orbis. The committees provided opportunities for many excellent staff from across the consortium to contribute talent and expertise and to establish peer groups. The creative funding structure, based on a formula that accounted for institutional size, enabled both small and large institutions to afford to participate. The prudent reserve fund provided flexibility for special needs.

The INN-Reach union catalog and patron-initiated borrowing service, supported by an efficient library courier, provided quick delivery of library materials at a very reasonable cost. The INN-Reach software was easy to use and managed borrowing and lending activity efficiently. The load leveling software instilled a sense among members that each institution was gaining benefits in proportion to its contribution. The savings achieved through the group purchase program for electronic resources helped stretch institutional collections budgets. Orbis provided excellent, high profile, and popular library services to students and faculty at member institutions and enjoyed a high level of support from campus administrators.

The first meeting of the new Orbis Cascade Alliance Council took place in April 2003 and the new consortium was launched.⁷⁴ Twelve years later, the Alliance has grown and evolved and continues to provide a range of creative and cost-effective library services to support higher education in the Pacific Northwest.

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- ¹ Orbis Cascade Alliance Mission, accessed March 9, 2015, <https://www.orbiscascade.org/about/>
- ² OhioLINK History, accessed May 30, 2014, <https://www.ohiolink.edu/content/history>
- ³ Correspondence with Gary Jensen, September 2, 2014.
- ⁴ *Proposal to the Meyer Memorial Trust*, May, 1993. John F. Helmer Archive (HA).
- ⁵ Union Catalog Meeting Packet, 9-27-93. HA.
- ⁶ Orbis Council Meeting Packet (OCMP), 7-24/25-00. HA.
- ⁷ OCMP, 12-14-93.
- ⁸ OCMP, 9-26-94.
- ⁹ OCMP, 3-9-94.
- ¹⁰ OCMP, 8-12-94.
- ¹¹ OCMP, 12-4-95.
- ¹² OCMP, 5-24-96.
- ¹³ OCMP, 9-20-96, 10-28-96.
- ¹⁴ OCMP, 3-22-01.
- ¹⁵ OCMP, 1-23-98, 5-8-98.
- ¹⁶ OCMP, 9-4-98, 12-18-14.
- ¹⁷ OCMP, 9-29-00.
- ¹⁸ Sue A. Burkholder, "Orbis: Grassroots Academic Partnership," *OLA Quarterly*, 5, no. 1 (Winter 1999): 2-3.
- ¹⁹ Draft *Annual Report*, January 2000. HA.
- ²⁰ *Annual Report: Orbis Borrowing Committee*, August 4, 2000. HA.
- ²¹ *Orbis Library Consortium, Snapshot for ICCL*, October 2002. HA.
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- ²³ *Interim Report*, 1994. HA.
- ²⁴ *Interim Report*, 1994. HA.
- ²⁵ OCMP, 11-5-93, 11-19-93, 6-20-96.
- ²⁶ OCMP, 9-26-94.
- ²⁷ OCMP, 4-21-95.
- ²⁸ OCMP, 1-10-97, 10-1-97.
- ²⁹ OCMP, 7-24/25-00.
- ³⁰ OCMP, 11-7-94, 2-27-95, 4-21-95, 12-4-95, 9-20-96.

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- ³¹ OCMP, 9-4-98, 12-18-98.
- ³² OCMP, 10-19-99, 1-7-00, 7-24/25-00, 1-22-01.
- ³³ OCMP, 4-8-97.
- ³⁴ OCMP, 4-8-97.
- ³⁵ OCMP, 1-7-00.
- ³⁶ OCMP, 1-15-99.
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- ⁴⁰ OCMP, 9-20-96, 10-28-96.
- ⁴¹ OCMP, 4-8-97.
- ⁴² OCMP, 11-17-97.
- ⁴³ OCMP, 5-8-98.
- ⁴⁴ OCMP, 5-8-98, 7-14/15-98, 9-4-98, 12-18-98, HA. John F. Helmer, "Orbis Courier Service: The Resurrection of a Collaborative Success," *OLA Quarterly*, 5, no. 1 (Winter 1999): 8-10.
- ⁴⁵ OCMP, 7-27-99. *Draft Annual Report*, January 2000. HA.
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