Orbis Cascade Alliance
Strategic Plan 2019-2024

In November 2018, the Orbis Cascade Alliance Council approved a strategic plan for 2019-2024. Creating the plan was a 16 month effort, and engaged every person at an Alliance institution who wanted to participate, as well as Alliance central staff, Board and Council.

The plan identifies our high level Themes, goals, and activities we undertake to achieve those goals. While the activities may be adjusted over time, we expect the Mission, Vision, Themes and goals to remain consistent. However, the Council will reconsider the plan every year and make adjustment based on member input and environmental conditions.

VISION

The Orbis Cascade Alliance, an exemplary academic library consortium, is a vital partner in advancing transformative learning and research and creating equity in higher education.

MISSION

Orbis Cascade Alliance pushes the boundaries of what is possible in libraries through strategic collaboration in the Pacific Northwest. To advance member institutions, we create and deliver innovative, sustainable, and essential library programs and resources.

Strengthen Member Institutions	Improve Access to Information	Inspire Knowledge Creation	Equip Students for Success

Build member staff capacity to address challenges through innovative practices	Implement programs to increase access to physical and digital collections across member institutions	Partner in the creation of high quality research, scholarship, and curricula	Contribute to students' ability to navigate an information-rich environment as literate information users and creators
Maximize return on member investment through shared systems and resource purchase/licensing programs	Enhance equitable access to information by curating, disseminating, and improving discoverability of both unique and existing content	Develop infrastructure and expertise to support the dissemination of newly created or adapted information resources	Create, disseminate, and preserve the information resources needed to enhance student learning, scholarship, and creative activities
Coordinate and leverage expertise within individual member institutions for shared benefit	Catalyze a more open and sustainable scholarly communication system that prioritizes high quality resources that are open, free, or low-cost	Curate physical and digital collections that foster diversity and inclusiveness in research, scholarship, and teaching	Reduce student financial pressures by promoting and supporting open and affordable resources

IN ALL THINGS WE WILL

Collaborate for Shared Benefit - Value Shared Innovation

Be Intentional - Act with Integrity and Respect

Approved Initiatives by Themes, Goals and relative priority (published in December 2018)

Strengthen Member Institutions: Build member staff capacity to address challenges through innovative practices			
Initiative Name	**Brief Description**	**Contact**	**Priority**
Cross-program work on unique & local materials in the SILS	Increase study of and resolution to issues affecting unique materials represented in the Alliance's Shared ILS (SILS) (Primo and Alma). Examine and revise both consortial and institutional practices taking into account issues of system limitations, effects on other materials, and institutional resources. Communicate and coordinate with Alliance staff and groups to resolve issues. Identify areas where documentation, training and staff development can enable standards-compliant metadata.	Unique & Local Collections Team	First
Copyright First Responders Alliance Hub	In 2017-2018, the Helmer Award was granted to fund a pilot CFR program. CFR, modeled after a successful program at Harvard, is a decentralized, grassroots community of practice and support that increases copyright capacity throughout a library network, such as the Alliance. Demand for in-depth copyright training and interest in participating in CFR far exceeds the number of available spots in the pilot. Most library staff receive little to no formal education about copyright but confront many complex copyright situations in their work. To continue and expand upon the work of the pilot, the Alliance should fund 3-4 additional CFR cohorts, provide logistical support for regional in-depth copyright trainings (to be led by CFRs) during the 2019-2024 period, and continue to provide limited logistical support for CFR communications. This modest strategic investment will increase copyright capacity within Alliance institutions and allow library staff to respond appropriately to the array of unique and complex copyright questions encountered at individual libraries.	TBD	First

Fulfillment Training and Documentation	With circulation and fulfillment configurations having immediate public impact on our users, we would like to open an initiative to increase fulfillment training and documentation from the Alliance level. As a standing group we have identified a range of topics about which member libraries feel training and increased documentation would be beneficial. Increased Alliance-level training and documentation could ultimately lead to more efficient local service, greater standardization, and less need for one-on-one assistance from Alliance central staff.	Resource Sharing & Fulfillment Team	Second
Training strategy	Members frequently report wanting more training — and preferred in person training. Teams often report either engaging in training and/or not finding member staff interested in creating and delivering training. Alliance central staff are not the best trainers for most content, as they do not work in most systems that members use in the same way. This initiative must create a cohesive strategy, approach and guidelines for training across the Alliance.	Central Staff	Second
Alliance-wide Mentorship Program (also combines Alliance Mentorship Program (AMP) and Collaborative Workforce Mentoring initiatives)	A mentorship program will expand the pool of Alliance member library staff who can contribute to Alliance programs. Generally speaking, Alliance programs lack a wide pool of Alliance member staff who have the skills needed to advance those programs. Likewise, developing a broader base of knowledge and skills that support Alliance activities will help member libraries who have sometimes struggled to fully support collaborative work. The mentoring program will be a means of developing member library staff so that the Alliance has a more effective, more evenly distributed collaborative workforce. It will provide a formal structure for experienced Alliance contributors to connect with newer, less experienced member library staff so that those less experienced can develop skills needed to contribute to Alliance programs. Participants in the program will develop domain knowledge (e.g., network-level cataloging, resource sharing) and/or leadership skills. The structure will be flexible enough to accommodate one-on-one mentoring as well as mentoring that occurs within the activities of Alliance groups. Member library staff who have the knowledge, skills, and abilities to support the work of the Alliance often have barriers to begin working in the Alliance, including a strong understanding of Alliance structure and shared work, skills using our shared collaborative work tools, and institutional support for engaging in the work. To build sustainable capacity in supporting the work of the Alliance, we propose using the RSF Mentorship Program	Central Staff	Second

	Pilot, launched FY18, as a model for all Alliance program areas to develop a robust community of engagement in, and support of, shared work. We propose developing and implementing a one day train the trainer event for Program Managers, Team Chairs, and Chairs-elect, where we would step through the program structure and curriculum we have developed for RSF, transferring that knowledge and experience, and supporting participants to customize these resources. This approach allows for a standardized baseline and common experience for participants, including shared learning outcomes across all program areas, while allowing for further development tailored to specific communities.		
Becoming more standardized: Alliance use of Ex Libris Alma	To fully take advantage of its shared library management system, the Alliance needs to achieve a greater level of standardization in the Ex Libris Alma service. Standardization has been a challenge given that Alliance institutions migrated to Alma in six different migrations (cohorts 1-4 in 2013-2015) along with two individual institution migrations. There's been a move towards standardization in some technical services work practices, described in the current Technical Services policies, but the lack of standardization in other areas of service use impede the use of shared reporting, including reporting to support accreditation reviews. In order to achieve the best results, the Alliance should consider a contract with Ex Libris Professional Services to support analysis of Alliance settings and to recommend approaches for more efficient Alma-side work.	Central Staff	TBD

Strengthen Member Institutions: Maximize return on member investment through shared systems and resource purchase/licensing programs			
Initiative Name	**Brief Description**	**Contact**	**Priority**
Streamline licensing and invoicing process	The Alliance licenses over $10M of e-content at the consortial level annually. Many of these resources are billed centrally through the Alliance office. This is a significant initiative which involves all members and many non-member institutions.	Shared Content & Technical Services Team	Completed in FY19

Norm Rules management	Normalization rules are an integral part of the Alliance's Primo discovery interface. These rules currently translate MARC metadata from Alma (and Dublin Core metadata from OAI repositories) into XML that is used by Primo to drive the display of resource data and the functionality of the front end (search, faceting, etc.). Normalization rules are only accessible at the installation level in Primo, so their management must be undertaken with discussion and input from member staff to minimize undesirable side effects.	Shared Content & Technical Services Team	First
Data Sharing	Several previous attempts have been made at establishing a data sharing MOU across Alliance members. We still need to establish several policies and a new MOU, and act on the recommendations adopted by Council in July 2017. This will enable better services and analytics for all members.	Central Staff	First
RFP For Shared Integrated Library System	Our Ex Libris contract will expire sometime during this period of our strategic plan. We should begin considering what we'd like with a new SILS several years before Ex Libris contract expiration, and map out the overall process for SILS adoption and implementation (as necessary).	Central staff	First
E-Content Group	The proposed standing or advisory E-Content Group will work with the PM-SCTS to review licenses and proposed pricing from consortial content providers. The group's role is to determine fair pricing and assists with license review. The group will develop standard model language for select license terms to facilitate negotiation and to ensure consortial concerns are reflected in final licenses.	Shared Content & Technical Services Team	First
Primo Release testing	Alliance coordinated testing of the new Primo releases on a quarterly basis.	Discovery & User Experience Team	Second
Investigate the Possibility of the Alliance Joining the FOLIO Open Source ILS Project or	Explore the viability of the Alliance participating in FOLIO development or a different open source ILS project, and determine if an open source solution is a viable shared ILS alternative to Alma prior in time to be a factor in decision making during the next anticipated ILS evaluation process. The working group would create recommendations regarding: The viability of the FOLIO or an alternate project and if it is a potentially superior option to our current system based on Alliance Requirements; What resources would be required from the	Central staff	Third

another Open Source ILS project	Alliance and its member organizations to become active participants in FOLIO development and then support FOLIO as the Alliances shared system; Should resources be deployed toward moving to the FOLIO or an alternative open source system at the end of the Ex Libris contract. This process is separate from the overall process of evaluating and selecting an ILS for the Alliance. An open source ILS would require an entirely different scope of support and coordination from the Alliance and provide a somewhat different set of benefits.		
NERS voting	Support for collaborative voting for Ex Libris product and content enhancements based upon the Ex Libris product development agreement. In January 2015, the Alliance's Board of Directors approved all member institutions joining ELUNA and voting collaboratively to increase Alliance impact in enhancement cycles. Since that date, cycle-specific working (or project) groups have been formed to review enhancements and create voting instructions for member institutions (to support centrally-identified enhancements).	Systems Team (Alma) & Discovery and User Experience Team (Primo)	Third
Alma release testing	Support for Alliance review of monthly Alma releases during the two week sandbox testing window, particularly for the 10 releases per year that deliver significant functionality. Includes review of vendor-produced Alma release notes and the list of resolved issues for each release. Alliance cases resolved by each release are also highlighted for review. An informal group of Alma release testers performs testing of the release and communicates via a listserv. Their work includes new features testing (including those that have the potential for improving the use of Alma). Regressions described on the Alma community listserv ALMA-L and on an Alma consortial listserv are also reviewed by Alliance Alma testers.	Systems Team (lead)	Third
Central Analytics Group providing support for Alliance use of Primo/Alma Analytics	A central Analytics group will provide ongoing support and expertise for the use of Alma and Primo Analytics. This will be a cross-functional group dedicated to creating reports used by all or many Orbis Cascade institutions and to providing as-needed support to Analytics questions from member institution staff. Currently, expertise on report building exists within several teams and dedicated Alliance community-level groups. This results in duplication of effort. Additionally, staff at individual institutions may not be aware of this expertise or how to access it. If a particular alliance staff member, alliance library or team had a need for an Analytics report or had a question, they could submit a request to the Central Analytics group by a similar process to the current Normalization and Primo Customization groups.	Systems Team (lead)	Third

Becoming more standardized: Alliance use of Ex Libris Alma	To fully take advantage of its shared library management system, the Alliance needs to achieve a greater level of standardization in the Ex Libris Alma service. Standardization has been a challenge given that Alliance institutions migrated to Alma in six different migrations (cohorts 1-4 in 2013-2015) along with two individual institution migrations. There's been a move towards standardization in some technical services work practices, described in the current Technical Services policies, but the lack of standardization in other areas of service use impede the use of shared reporting, including reporting to support accreditation reviews. In order to achieve the best results, the Alliance should consider a contract with Ex Libris Professional Services to support analysis of Alliance settings and to recommend approaches for more efficient Alma-side work.	Central staff	TBD
Rota Management	Supports equitable shared borrowing and lending by adjusting the Alliance rota. Removes libraries from the rota for closure periods longer than five days.	Resource Sharing & Fulfillment Team	Operational
Bibliographic Records Management	Prior to the NZ Manager's hire, institutions have managed NZ records in a distributed manner, on a volunteer and ad hoc basis. In our complex environment, this presents a challenge to maintaining stable staffing and expertise, as well as consistency in management. Centralizing bib record management in the Network Zone through the Network Zone Manager has already provided a more consistent strategy for shared work. This consistency will continue to provide the opportunity for closer collaboration between members and greater stability for our shared record database.	Shared Content & Technical Services Team	Operational
Salesforce case management/tracking	Submission of Alliance-level Salesforce cases and monitoring of Salesforce cases by central staff and teams/groups. Central and institution staff identify case trends and share that information within the Alliance. Central office staff perform periodic monitoring of Alliance institution Salesforce cases, including real-time monitoring of cases submitted during workdays. Central staff use direct communications and regular meetings with Ex Libris North America support managers to surface the highest priority/need cases on behalf of institutions.	Central staff	Operational
Shared Record Loading	Expand documented process and practices for centrally loading more Alliance e-resource collection records into the Network Zone. Once loaded to the NZ, these records are "pushed"	Central staff	Operational

	to members entitled to access the content and/or receive the related metadata. Ongoing maintenance loads and troubleshooting are centrally managed.		
Courier service management	Alliance member libraries and dropsites in Oregon, Washington and Idaho rely on the courier service for low cost sharing of physical materials. The role of this work is to: Ensure the courier service is functioning within contracted parameters; to review and adjust pricing as necessary; and to support Alliance members and dropsites participating in the service through standardizing processes, keeping documentation current, sharing network-wide statistics, and timely communication around service delays or outages.	Central staff	Operational

Strengthen Member Institutions: Coordinate and leverage expertise within individual member institutions for shared benefit			
Initiative Name	**Brief Description**	**Contact**	**Priority**
Copyright First Responders Alliance Hub	In 2017-2018, the Helmer Award was granted to fund a pilot CFR program. CFR, modeled after a successful program at Harvard, is a decentralized, grassroots community of practice and support that increases copyright capacity throughout a library network, such as the Alliance. Demand for in-depth copyright training and interest in participating in CFR far exceeds the number of available spots in the pilot. Most library staff receive little to no formal education about copyright but confront many complex copyright situations in their work. To continue and expand upon the work of the pilot, the Alliance should fund 3-4 additional CFR cohorts, provide logistical support for regional in-depth copyright trainings (to be led by CFRs) during the 2019-2024 period, and continue to provide limited logistical support for CFR communications. This modest strategic investment will increase copyright capacity within Alliance institutions and allow library staff to respond appropriately to the array of unique and complex copyright questions encountered at individual libraries.	TBD	First
Training strategy	Members frequently report wanting more training — and preferred in person training. Teams often report either engaging in training and/or not finding member staff interested in creating and delivering training. Alliance central staff are not the best trainers for most content, as they do not work in most systems that members use in the same way. This initiative must create a cohesive strategy, approach and guidelines for training across the Alliance.	Central staff	Second

Alliance-wide Mentorship Program (also combines Alliance Mentorship Program (AMP) and Collaborative Workforce Mentoring initiatives)	A mentorship program will expand the pool of Alliance Member library staff who can contribute to Alliance programs. Generally speaking, Alliance programs lack a wide pool of Alliance member staff who have the skills needed to advance those programs. Likewise, developing a broader base of knowledge and skills that support Alliance activities will help member libraries who have sometimes struggled to fully support collaborative work. The mentoring program will be a means of developing member library staff so that the Alliance has a more effective, more evenly distributed collaborative workforce. It will provide a formal structure for experienced Alliance contributors to connect with newer, less experienced member library staff so that those less experienced can develop skills needed to contribute to Alliance programs. Participants in the program will develop domain knowledge (e.g., network-level cataloging, resource sharing) and/or leadership skills. The structure will be flexible enough to accommodate one-on-one mentoring as well as mentoring that occurs within the activities of Alliance groups. Member library staff who have the knowledge, skills, and abilities to support the work of the Alliance often have barriers to begin working in the Alliance, including a strong understanding of Alliance structure and shared work, skills using our shared collaborative work tools, and institutional support for engaging in the work. To build sustainable capacity in supporting the work of the Alliance, we propose using the RSF Mentorship Program Pilot, launched FY18, as a model for all Alliance program areas to develop a robust community of engagement in, and support of, shared work. We propose developing and implementing a one day train the trainer event for Program Managers, Team Chairs, and Chairs-elect, where we would step through the program structure and curriculum we have developed for RSF, transferring that knowledge and experience, and supporting participants to customize these resources. This approach allows for a standardized baseline and common experience for participants, including shared learning outcomes across all program areas, while allowing for further development tailored to specific communities.	Central staff	Second
Central Analytics Group providing support for Alliance use of Primo/Alma Analytics	A central Analytics group will provide ongoing support and expertise for the use of Alma and Primo Analytics. This will be a cross-functional group dedicated to creating reports used by all or many Orbis Cascade institutions and to providing as-needed support to Analytics questions from member institution staff. Currently, expertise on report building exists within several teams and dedicated Alliance community-level groups. This results in duplication of effort. Additionally, staff at individual institutions may not be aware of this expertise or how to access it. If a particular alliance staff member, alliance library or team had a need for an Analytics report or had a question, they could submit a request to the Central Analytics group by a similar process to the current Normalization and Primo Customization groups.	Systems Team (lead)	Third

Social Equity Committee	The new vision statement is: The Orbis Cascade Alliance, an exemplary academic library consortium, is a vital partner in advancing transformative learning and research and creating equity in higher education. But what does it means to create equity in higher education and in what direct ways does the Alliance actively promote and work towards creating equity in higher education? While Council voted to endorse this vision, I propose we take it a step further by actively identifying specific programs and services that demonstrate a proactive stance. This may include being more focused on documenting our already in place initiatives such as improved discoverability, focus on Open Access, exposing hidden collections or addressing new models and programs. Member Libraries already have programs in place to look at diversity, inclusion and social equity. Since we voted to include equity in our vision statement, I feel having a greater commitment to the concept would enhance our collaborative work. By not doing so, we would be reactive rather than proactive.	Central staff	TBD

Improve Access to Information: Implement programs to increase access to physical and digital collections across member institutions			
Initiatives	**Brief Description**	**Contact**	**Priority**
Streamline licensing and invoicing process	The Alliance licenses over $10M of e-content at the consortial level annually. Many of these resources are billed centrally through the Alliance office. This is a significant initiative which involves all members and many non-member institutions.	Shared Content & Technical Services Team	Completed in FY19
E-Content Group	The proposed standing or advisory E-Content Group will work with the PM-SCTS to review licenses and proposed pricing from consortial content providers. The group's role is to determine fair pricing and assists with license review. The group will develop standard model language for select license terms to facilitate negotiation and to ensure consortial concerns are reflected in final licenses.	Shared Content & Technical Services Team	First
Cross-program work on unique & local	Increase study of and resolution to issues affecting unique materials represented in the Alliance's Shared ILS (SILS) (Primo and Alma). Examine and revise both consortial and institutional practices taking into account issues of system limitations, effects on other	Unique & Local Collections Team	First

materials in the SILS	materials, and institutional resources. Communicate and coordinate with Alliance staff and groups to resolve issues. Identify areas where documentation, training and staff development can enable standards-compliant metadata.		
User experience and accessibility	The DUX Team advocates for the user experience in development of software, tools and other resources in discovery platforms. ULC has lead user testing for Archives West (previously NWDA) since 2007 and made changes to improve the interface based on that testing. Accessibility is a new focus area to the Alliance and we are working to improve and strengthen our ability to test and advocate our findings to vendors as well as provide support to members.	Discovery & User Experience Team	First
OER Metadata and Discoverability	The goal of this initiative is to create a community of practice to make open educational resources (OER) more easily discoverable using the Alliance's investment in a shared ILS. As a medium-scale investment in OER, we recommend that the Alliance do the following: ● Expand in FY 19 on collaborative work between the OER Standing Group and SC/TS Teams to identify practices for improving discovery of OER in Primo. ● Convene other library consortia peers (including, but not limited to, GWLA, OhioLink, LOUIS, SUNY/CUNY) to address unique challenges of OER discoverability and metadata standards associated with an ILS environment. ● Undertake this work at existing in-person conferences (such as OpenEd) or via virtual meetings. The hope is that partnerships with other consortia will produce a community of practice which will better leverage shared OER and library technical expertise, resolve current metadata challenges as these impact discoverability, and ultimately break down current library consortium silos to increase access to OER.	Unique & Local Collections Team	Second
Courier service management	Alliance member libraries and dropsites in Oregon, Washington and Idaho rely on the courier service for low cost sharing of physical materials. The role of this work is to: Ensure the courier service is functioning within contracted parameters; to review and adjust pricing as necessary; and to support Alliance members and dropsites participating in the service through standardizing processes, keeping documentation current, sharing network-wide statistics, and timely communication around service delays or outages.	Central staff	Operational
Alliance	A centrally-supported institutional repository platform (whether multi-tenant or	Unique & Local	Third

Centrally Supported Institutional Repository Platform	individual instances) will directly support Alliance member institutions as they create, collect, preserve, and disseminate unique and local content. This initiative proposes the creation of a project group to research the specific costs and optimal hosting models of a centrally-supported service and to conduct a pilot of a recommended platform. Within the Alliance, activities supporting unique and local content have grown significantly over the past decade; currently, 27 members have at least one digital repository or digital asset management platform to showcase and disseminate their institution's scholarship, creative works, and digital collections. When the current investment by members in this area is considered, there is a clear opportunity to create efficiencies and reduce member costs (both in money and time) by the Alliance hosting, and providing centralized support for, a shared platform. By investing in this area, the Alliance will not only create economies of scale for digital collection management, but will also: (a) enable members to do more together (in terms of development/ enhancement of a repository platform) than could be done alone locally and (b) reduce the barrier to participation for institutions who do not currently have a repository.	Collections Team	
DPLA hub membership	Continue participation in the DPLA program as originally envisioned in the 2016 approval. This means these activities would occur over the next fiscal years: 1. Make adjustments to metadata and the Harvester as necessary to remain a full participating member in the DPLA Hub Network. 2. Keep DPLA Hub membership as an "all in" requirement in Alliance participation. 3. Reconsider DPLA membership and participation annually.	Unique & Local Collections Team	TBD
Summit Policy Review	The Shared Resources Joint Project Group (JPG) was convened as a collaborative effort between the Shared Content & Technical Services and the Resource Sharing & Fulfillment Teams, to create a community assessment of collection development trends and resource sharing practices. Two concurrent surveys (a community needs survey and an institutional survey) were distributed with responses collected between May 8th - 18th, 2018 and a final report distributed in July 2018. Based on a review of the data, the SPG made two recommendations concerning resource sharing policy. First, the project group recommended that we consider allowing renewals for Summit loans. Second, they recommended an extension of the short loan period for audiovisual materials. These recommendations were discussed at Summit & Fulfillment Day 2018 and warrant further examination by the RSF Team and Summit	Resource Sharing & Fulfillment	TBD

	Standing group. The anticipated result of this initiative will be longer Summit loan periods and/or support for renewals.		
Shared Record Loading	Expand documented process and practices for centrally loading more Alliance e-resource collection records into the Network Zone. Once loaded to the NZ, these records are "pushed" to members entitled to access the content and/or receive the related metadata. Ongoing maintenance loads and troubleshooting are centrally managed.	Shared Content & Technical Services Team	Operational
E-book selection and acquisition	Develop a shared Alliance-wide collection of e-books accessible by all members via Alma/Primo using evidence-based selection models. Streamline the selection-to-acquisition process, leverage collective financial resources, and reduce redundancies in collection-building across the consortium.	Shared Content & Technical Services Team	Operational
Bibliographic Records Management	Prior to the NZ Manager's hire, institutions have managed NZ records in a distributed manner, on a volunteer and ad hoc basis. In our complex environment, this presents a challenge to maintaining stable staffing and expertise, as well as consistency in management. Centralizing bib record management in the Network Zone through the Network Zone Manager has already provided a more consistent strategy for shared work. This consistency will continue to provide the opportunity for closer collaboration between members and greater stability for our shared record database.	Shared Content & Technical Services Team	Operational
A&M	The Unique & Local Collections Team will combine pre-existing separate Initiatives as appropriate and articulate a cohesive strategy to provide Alliance members service for archives & manuscripts. Initiatives include: Archives West development, New Archives West infrastructure, Expand Alliance Harvester to Enable ArchivesSpace to Archives West Harvesting, ArchivesSpace hosting, Archives West management	Unique & Local Collections Team	Operational

Improve Access to Information: Enhance equitable access to information by curating, disseminating, and improving discoverability of both unique and existing content			
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User experience and accessibility	The DUX Team advocates for the user experience in development of software, tools and other resources in discovery platforms. ULC has lead user testing for Archives West (previously NWDA) since 2007 and made changes to improve the interface based on that testing. Accessibility is a new focus area to the Alliance and we are working to improve	Discovery & User Experience Team	First

	and strengthen our ability to test and advocate our findings to vendors as well as provide support to members.		
Cross-program work on unique & local materials in the SILS	Increase study of and resolution to issues affecting unique materials represented in the Alliance's Shared ILS (SILS) (Primo and Alma).Examine and revise both consortial and institutional practices taking into account issues of system limitations, effects on other materials, and institutional resources. Communicate and coordinate with Alliance staff and groups to resolve issues. Identify areas where documentation, training and staff development can enable standards-compliant metadata.	Unique & Local Collections Team	First
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Joint Working Group on Accessibility between Alliance and NWACC	An Accessibility Working Group (AWG) consisting of members from both the Alliance and NWACC institutions to advance our common goal of ensuring services, systems, learning technologies, curricular and scholarly resources are made accessible to users. The AWG has developed a high-level plan that outlines a set of collaborative activities, including estimated timelines and associated resource requirements needed to help our member institutions meet their accessibility requirements. These activities include developing a brief survey of member needs, cultivating a community of practice, implementing a knowledge base repository of best practices, developing a self-assessment tool to evaluate accessibility, and promoting findings and knowledge transfer through conferences and workshops.	Discovery & User Experience Team	Second
E-book selection and acquisition	Develop a shared Alliance-wide collection of e-books accessible by all members via Alma/Primo using evidence-based selection models. Streamline the selection-to-acquisition process, leverage collective financial resources, and reduce redundancies in collection-building across the consortium.	Shared Content & Technical Services Team	Operational

Bibliographic Records Management	Prior to the NZ Manager's hire, institutions have managed NZ records in a distributed manner, on a volunteer and ad hoc basis. In our complex environment, this presents a challenge to maintaining stable staffing and expertise, as well as consistency in management. Centralizing bib record management in the Network Zone through the Network Zone Manager has already provided a more consistent strategy for shared work. This consistency will continue to provide the opportunity for closer collaboration between members and greater stability for our shared record database.	Shared Content & Technical Services Team	Operational
A&M	The Unique & Local Collections Team will combine pre-existing separate Initiatives as appropriate and articulate a cohesive strategy to provide Alliance members service for archives & manuscripts. Initiatives include: Archives West development, New Archives West infrastructure, Expand Alliance Harvester to Enable ArchivesSpace to Archives West Harvesting, ArchivesSpace hosting, Archives West management	Unique & Local Collections Team	Operational

Improve Access to Information: Catalyze a more open and sustainable scholarly communication system that prioritizes high quality resources that are open, free, or low-cost			
Initiative Name	**Brief Description**	**Contact**	**Priority**
OER Metadata and Discoverability	The goal of this initiative is to create a community of practice to make open educational resources (OER) more easily discoverable using the Alliance's investment in a shared ILS. As a medium-scale investment in OER, we recommend that the Alliance do the following: ● Expand in FY 19 on collaborative work between the OER Standing Group and SC/TS Teams to identify practices for improving discovery of OER in Primo. ● Convene other library consortia peers (including, but not limited to, GWLA, OhioLink, LOUIS, SUNY/CUNY) to address unique challenges of OER discoverability and metadata standards associated with an ILS environment. ● Undertake this work at existing in-person conferences (such as OpenEd) or via virtual meetings. The hope is that partnerships with other consortia will produce a community of practice which will better leverage shared OER and library technical expertise, resolve current	Unique & Local Collections Team	Second

	metadata challenges as these impact discoverability, and ultimately break down current library consortium silos to increase access to OER.		
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Inspire Knowledge Creation: Partner in the creation of high quality research, scholarship, and curricula		
Initiative	**Brief Description**	**Contact**	**Priority**
Copyright First Responders Alliance Hub	In 2017-2018, the Helmer Award was granted to fund a pilot CFR program. CFR, modeled after a successful program at Harvard, is a decentralized, grassroots community of practice and support that increases copyright capacity throughout a library network, such as the Alliance. Demand for in-depth copyright training and interest in participating in CFR far exceeds the number of available spots in the pilot. Most library staff receive little to no formal education about copyright but confront many complex copyright situations in their work. To continue and expand upon the work of the pilot, the Alliance should fund 3-4 additional CFR cohorts, provide logistical support for regional in-depth copyright trainings (to be led by CFRs) during the 2019-2024 period, and continue to provide limited logistical support for CFR communications. This modest strategic investment will increase copyright capacity within Alliance institutions and allow library staff to respond appropriately to the array of unique and complex copyright questions encountered at individual libraries.	TBD	First

Inspire Knowledge Creation: Develop infrastructure and expertise to support the dissemination of newly created or adapted information resources			
Initiative	**Brief Description**	**Contact**	**Priority**
Cross-program work on unique & local materials in the SILS	Increase study of and resolution to issues affecting unique materials represented in the Alliance's Shared ILS (SILS) (Primo and Alma). Examine and revise both consortial and institutional practices taking into account issues of system limitations, effects on other materials, and institutional resources. Communicate and coordinate with Alliance staff and groups to resolve issues. Identify areas where documentation, training and staff development can enable standards-compliant metadata.	Unique & Local Collections Team (lead)	First
Data Sharing	Several previous attempts have been made at establishing a data sharing MOU across Alliance members. We still need to establish several policies and a new MOU, and act on the recommendations adopted by Council in July 2017. This will enable better services and analytics for all members.	Central staff	First
RFP For Shared Integrated Library System	Our Ex Libris contract will expire sometime during this period of our strategic plan. We should begin considering what we'd like with a new SILS several years before Ex Libris contract expiration, and map out the overall process for SILS adoption and implementation (as necessary).	Central staff	First
OER Metadata and Discoverability	The goal of this initiative is to create a community of practice to make open educational resources (OER) more easily discoverable using the Alliance's investment in a shared ILS. As a medium-scale investment in OER, we recommend that the Alliance do the following: ● Expand in FY 19 on collaborative work between the OER Standing Group and SC/TS Teams to identify practices for improving discovery of OER in Primo. ● Convene other library consortia peers (including, but not limited to, GWLA, OhioLink, LOUIS, SUNY/CUNY) to address unique challenges of OER discoverability and metadata standards associated with an ILS environment. ● Undertake this work at existing in-person conferences (such as OpenEd) or via virtual meetings. The hope is that partnerships with other consortia will produce a community of practice which will better leverage shared OER and library technical expertise, resolve current	Unique & Local Collections Team	Second

	metadata challenges as these impact discoverability, and ultimately break down current library consortium silos to increase access to OER.		
Investigate the Possibility of the Alliance Joining the FOLIO Open Source ILS Project or another Open Source ILS project	Explore the viability of the Alliance participating in FOLIO development or a different open source ILS project, and determine if an open source solution is a viable shared ILS alternative to Alma prior in time to be a factor in decision making during the next anticipated ILS evaluation process. The working group would create recommendations regarding: The viability of the FOLIO or an alternate project and if it is a potentially superior option to our current system based on Alliance Requirements; What resources would be required from the Alliance and its member organizations to become active participants in FOLIO development and then support FOLIO as the Alliances shared system; Should resources be deployed toward moving to the FOLIO or an alternative open source system at the end of the Ex Libris contract. This process is separate from the overall process of evaluating and selecting an ILS for the Alliance. An open source ILS would require an entirely different scope of support and coordination from the Alliance and provide a somewhat different set of benefits.	Central staff	Third
Alliance Centrally Supported Institutional Repository Platform	A centrally-supported institutional repository platform (whether multi-tenant or individual instances) will directly support Alliance member institutions as they create, collect, preserve, and disseminate unique and local content. This initiative proposes the creation of a project group to research the specific costs and optimal hosting models of a centrally-supported service and to conduct a pilot of a recommended platform. Within the Alliance, activities supporting unique and local content have grown significantly over the past decade; currently, 27 members have at least one digital repository or digital asset management platform to showcase and disseminate their institution's scholarship, creative works, and digital collections. When the current investment by members in this area is considered, there is a clear opportunity to create efficiencies and reduce member costs (both in money and time) by the Alliance hosting, and providing centralized support for, a shared platform. By investing in this area, the Alliance will not only create economies of scale for digital collection management, but will also: (a) enable members to do more together (in terms of development/ enhancement of a repository platform) than could be done alone locally and (b) reduce the barrier to participation for institutions who do not currently have a repository.	Unique & Local Collections	Third

Central Analytics Group providing support for Alliance use of Primo/Alma Analytics	A central Analytics group will provide ongoing support and expertise for the use of Alma and Primo Analytics. This will be a cross-functional group dedicated to creating reports used by all or many Orbis Cascade institutions and to providing as-needed support to Analytics questions from member institution staff. Currently, expertise on report building exists within several teams and dedicated Alliance community-level groups. This results in duplication of effort. Additionally, staff at individual institutions may not be aware of this expertise or how to access it. If a particular alliance staff member, alliance library or team had a need for an Analytics report or had a question, they could submit a request to the Central Analytics group by a similar process to the current Normalization and Primo Customization groups.	Systems Team (lead)	Third
DPLA hub membership	Continue participation in the DPLA program as originally envisioned in the 2016 approval. This means these activities would occur over the next fiscal years: 1. Make adjustments to metadata and the Harvester as necessary to remain a full participating member in the DPLA Hub Network. 2. Keep DPLA Hub membership as an "all in" requirement in Alliance participation. 3. Reconsider DPLA membership and participation annually.	Unique & Local Collections Team	TBD
Becoming more standardized: Alliance use of Ex Libris Alma	To fully take advantage of its shared library management system, the Alliance needs to achieve a greater level of standardization in the Ex Libris Alma service. Standardization has been a challenge given that Alliance institutions migrated to Alma in six different migrations (cohorts 1-4 in 2013-2015) along with two individual institution migrations. There's been a move towards standardization in some technical services work practices, described in the current Technical Services policies, but the lack of standardization in other areas of service use impede the use of shared reporting, including reporting to support accreditation reviews. In order to achieve the best results, the Alliance should consider a contract with Ex Libris Professional Services to support analysis of Alliance settings and to recommend approaches for more efficient Alma-side work.	Central staff	TBD

Inspire Knowledge Creation: Curate physical and digital collections that foster diversity and inclusiveness in research, scholarship, and teaching			
Initiative	**Brief Description**	**Contact**	**Priority**
E-Content Group	The proposed standing or advisory E-Content Group will work with the PM-SCTS to review licenses and proposed pricing from consortial content providers. The group's role is to determine fair pricing and assists with license review. The group will develop standard model language for select license terms to facilitate negotiation and to ensure consortial concerns are reflected in final licenses.	Shared Content & Technical Services Team	First
Alliance Centrally Supported Institutional Repository Platform	A centrally-supported institutional repository platform (whether multi-tenant or individual instances) will directly support Alliance member institutions as they create, collect, preserve, and disseminate unique and local content. This initiative proposes the creation of a project group to research the specific costs and optimal hosting models of a centrally-supported service and to conduct a pilot of a recommended platform. Within the Alliance, activities supporting unique and local content have grown significantly over the past decade; currently, 27 members have at least one digital repository or digital asset management platform to showcase and disseminate their institution's scholarship, creative works, and digital collections. When the current investment by members in this area is considered, there is a clear opportunity to create efficiencies and reduce member costs (both in money and time) by the	Unique & Local Collections Team	Third

	Alliance hosting, and providing centralized support for, a shared platform. By investing in this area, the Alliance will not only create economies of scale for digital collection management, but will also: (a) enable members to do more together (in terms of development/ enhancement of a repository platform) than could be done alone locally and (b) reduce the barrier to participation for institutions who do not currently have a repository.		
DPLA hub membership	Continue participation in the DPLA program as originally envisioned in the 2016 approval. This means these activities would occur over the next fiscal years: 1. Make adjustments to metadata and the Harvester as necessary to remain a full participating member in the DPLA Hub Network. 2. Keep DPLA Hub membership as an "all in" requirement in Alliance participation. 3. Reconsider DPLA membership and participation annually.	Unique & Local Collections Team	TBD
Shared Collections Assessment	The Alliance currently collects statistics on consortial ebook programs (DDA, EBA), with the most extensive reporting provided for the shared DDA with ProQuest's Ebook Central. The Alliance has the opportunity to expand its horizons on consortial stats collection and analysis beyond shared ebook programs to include the vast array of e-resources shared by member libraries. A shared collections assessment initiative will bolster our mission of collaboration and innovation among member libraries, and will allow us to remain in the forefront of collections assessment trends in the industry in general. We strive to support shared collections and acquisitions models that are both	Shared Content & Technical Services Team	TBD

	innovative and sustainable; the ability to collect, analyze, and visualize metrics across member libraries will help guide us in determining which shared resources and collections are most worth our collective funding and efforts. An intentional, strategic, and creative plan for shared collections assessment will also have practical implications for each member library. If the Alliance is able to identify more areas for collaborative collection-building through intentional assessment, individual member libraries will have the opportunity to be more creative in their local acquisitions practices, revisiting pay-per-view models, dismantling pricey "big deals", and repurposing collections funds toward open access initiatives.		
E-book selection and acquisition	Develop a shared Alliance-wide collection of e-books accessible by all members via Alma/Primo using evidence-based selection models. Streamline the selection-to-acquisition process, leverage collective financial resources, and reduce redundancies in collection-building across the consortium.	Shared Content & Technical Services Team	Operational
A&M	The Unique & Local Collections Team will combine pre-existing separate Initiatives as appropriate and articulate a cohesive strategy to provide Alliance members service for archives & manuscripts. Initiatives include: Archives West development, New Archives West infrastructure, Expand Alliance Harvester to Enable ArchivesSpace to Archives West Harvesting, ArchivesSpace hosting, Archives West management	Unique & Local Collections Team	Operational

Equip Students for Success: Contribute to students' ability to navigate an information-rich environment as literate information users and creators			
Initiative	**Description**	**Contact**	**Priority**
RFP For Shared Integrated Library System	Our Ex Libris contract will expire sometime during this period of our strategic plan. We should begin considering what we'd like with a new SILS several years before Ex Libris contract expiration, and map out the overall process for SILS adoption and implementation (as necessary).	Central Staff	First
User experience and accessibility	The DUX Team advocates for the user experience in development of software, tools and other resources in discovery platforms. ULC has lead user testing for Archives West (previously NWDA) since 2007 and made changes to improve the interface based on that testing. Accessibility is a new focus area to the Alliance and we are working to improve and strengthen our ability to test and advocate our findings to vendors as well as provide support to members.	Discovery & User Experience	First
Norm Rules management	Normalization rules are an integral part of the Alliance's Primo discovery interface. These rules currently translate MARC metadata from Alma (and Dublin Core metadata from OAI repositories) into XML that is used by Primo to drive the display of resource data and the functionality of the front end (search, faceting, etc.). Normalization rules are only accessible at the installation level in Primo, so their management must be undertaken with discussion and input from member staff to minimize undesirable side effects.	Shared Content & Technical Services	First
Primo Central package management/ maintenance	The Central Package is used to extend functionality in Primo across all Alliance institutions. Customizations and extensions can be developed centrally, deployed via the Central Package,then enabled by institutions. The advantage of this implementation model vs. local implementation is than customizations (i.e. code) can be maintained and tested centrally, and is less work for institutions.	Systems Team	Second
Primo Release testing	Alliance coordinated testing of the new Primo releases on a quarterly basis.	Discovery & User Experience Team	Second

Shared Record Loading	Expand documented process and practices for centrally loading more Alliance e-resource collection records into the Network Zone. Once loaded to the NZ, these records are "pushed" to members entitled to access the content and/or receive the related metadata. Ongoing maintenance loads and troubleshooting are centrally managed.	Shared Content & Technical Services Team	Operational
Bibliographic Records Management	Institutions have heretofore managed NZ records in a distributed manner, on a volunteer and ad hoc basis. In our complex environment, this presents a challenge to maintaining stable staffing and expertise, as well as consistency in management. Centralizing bib record management in the Network Zone through the Network Zone Manager will provide a more consistent strategy for shared work. This consistency will provide the opportunity for closer collaboration between members and greater stability for our shared record database.	Shared Content & Technical Services Team	Operational

Equip Students for Success: Create, disseminate, and preserve the information resources needed to enhance student learning, scholarship, and creative activities			
Initiative	**Brief Description**	**Contact**	**Priority**
E-Content Group	The proposed standing or advisory E-Content Group will work with the PM-SCTS to review licenses and proposed pricing from consortial content providers. The group's role is to determine fair pricing and assists with license review. The group will develop standard model language for select license terms to facilitate negotiation and to ensure consortial concerns are reflected in final licenses.	Shared Content & Technical Services Team	First
Joint Working Group on Accessibility between Alliance and NWACC	An Accessibility Working Group (AWG) consisting of members from both the Alliance and NWACC institutions to advance our common goal of ensuring services, systems, learning technologies, curricular and scholarly resources are made accessible to users. The AWG has developed a high-level plan that outlines a set of collaborative activities, including estimated timelines and associated resource requirements needed to help our member institutions meet their accessibility requirements. These activities include developing a brief survey of member needs, cultivating a community of practice,	Discovery & User Experience Team	Second

	implementing a knowledge base repository of best practices, developing a self-assessment tool to evaluate accessibility, and promoting findings and knowledge transfer through conferences and workshops.		
Central / Shared IR	A centrally-supported institutional repository platform (whether multi-tenant or individual instances) will directly support Alliance member institutions as they create, collect, preserve, and disseminate unique and local content. This initiative proposes the creation of a project group to research the specific costs and optimal hosting models of a centrally-supported service and to conduct a pilot of a recommended platform. Within the Alliance, activities supporting unique and local content have grown significantly over the past decade; currently, 27 members have at least one digital repository or digital asset management platform to showcase and disseminate their institution's scholarship, creative works, and digital collections. When the current investment by members in this area is considered, there is a clear opportunity to create efficiencies and reduce member costs (both in money and time) by the Alliance hosting, and providing centralized support for, a shared platform. By investing in this area, the Alliance will not only create economies of scale for digital collection management, but will also: (a) enable members to do more together (in terms of development/ enhancement of a repository platform) than could be done alone locally and (b) reduce the barrier to participation for institutions who do not currently have a repository.	Unique & Local Collections Team	Third
Shared Collections Assessment	The Alliance currently collects statistics on consortial ebook programs (DDA, EBA), with the most extensive reporting provided for the shared DDA with ProQuest's Ebook Central. The Alliance has the opportunity to expand its horizons on consortial stats collection and analysis beyond shared ebook programs to include the vast array of e-resources shared by member libraries. A shared collections assessment initiative will bolster our mission of collaboration and innovation among member libraries, and will allow us to remain in the forefront of collections assessment trends in the industry in general. We strive to support shared collections and acquisitions models that are both innovative and sustainable; the ability to collect, analyze, and visualize metrics across member libraries will help guide us in determining which shared resources and collections are most worth our collective funding and efforts. An intentional, strategic, and creative plan for shared collections assessment will also have practical implications for each member library. If the Alliance is able to identify more areas for collaborative	Shared Content & Technical Services Team	TBD

	collection-building through intentional assessment, individual member libraries will have the opportunity to be more creative in their local acquisitions practices, revisiting pay-per-view models, dismantling pricey "big deals", and repurposing collections funds toward open access initiatives.		
DPLA hub membership	Continue participation in the DPLA program as originally envisioned in the 2016 approval. This means these activities would occur over the next fiscal years: 1. Make adjustments to metadata and the Harvester as necessary to remain a full participating member in the DPLA Hub Network. 2. Keep DPLA Hub membership as an "all in" requirement in Alliance participation. 3. Reconsider DPLA membership and participation annually.	Unique & Local Collections Team	TBD
A&M	The Unique & Local Collections Team will combine pre-existing separate Initiatives as appropriate and articulate a cohesive strategy to provide Alliance members service for archives & manuscripts. Initiatives include: Archives West development, New Archives West infrastructure, Expand Alliance Harvester to Enable ArchivesSpace to Archives West Harvesting, ArchivesSpace hosting, Archives West management	Unique & Local Collections Team	Operational

Equip Students for Success: Reduce student financial pressures by promoting and supporting open and affordable resources			
Initiative	**Brief Description**	**Contact**	**Priority**
Streamline licensing and invoicing process	The Alliance licenses over $10M of e-content at the consortial level annually. Many of these resources are billed centrally through the Alliance office. This is a significant initiative which involves all members and many non-member institutions.	Shared Content & Technical Services	Completed in FY19
E-Content Group	The proposed standing or advisory E-Content Group will work with the PM-SCTS to review licenses and proposed pricing from consortial content providers. The group's role is to determine fair pricing and assists with license review. The group will develop standard model language for select license terms to facilitate negotiation and to ensure consortial concerns are reflected in final licenses.	Shared Content & Technical Services	First

OER Metadata and Discoverability	The goal of this initiative is to create a community of practice to make open educational resources (OER) more easily discoverable using the Alliance's investment in a shared ILS. As a medium-scale investment in OER, we recommend that the Alliance do the following: ● Expand in FY 19 on collaborative work between the OER Standing Group and SC/TS Teams to identify practices for improving discovery of OER in Primo. ● Convene other library consortia peers (including, but not limited to, GWLA, OhioLink, LOUIS, SUNY/CUNY) to address unique challenges of OER discoverability and metadata standards associated with an ILS environment. ● Undertake this work at existing in-person conferences (such as OpenEd) or via virtual meetings. The hope is that partnerships with other consortia will produce a community of practice which will better leverage shared OER and library technical expertise, resolve current metadata challenges as these impact discoverability, and ultimately break down current library consortium silos to increase access to OER.	Unique & Local Collections Team	Second
Alliance Centrally Supported Institutional Repository Platform	A centrally-supported institutional repository platform (whether multi-tenant or individual instances) will directly support Alliance member institutions as they create, collect, preserve, and disseminate unique and local content. This initiative proposes the creation of a project group to research the specific costs and optimal hosting models of a centrally-supported service and to conduct a pilot of a recommended platform. Within the Alliance, activities supporting unique and local content have grown significantly over the past decade; currently, 27 members have at least one digital repository or digital asset management platform to showcase and disseminate their institution's scholarship, creative works, and digital collections. When the current investment by members in this area is considered, there is a clear opportunity to create efficiencies and reduce member costs (both in money and time) by the Alliance hosting, and providing centralized support for, a shared platform. By investing in this area, the Alliance will not only create economies of scale for digital collection management, but will also: (a) enable members to do more together (in terms of development/ enhancement of a repository platform) than could be done alone locally and (b) reduce the barrier to participation for institutions who do not currently have a repository.	Unique & Local Collections Team	Third

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A&M	The Unique & Local Collections Team will combine pre-existing separate Initiatives as appropriate and articulate a cohesive strategy to provide Alliance members service for archives & manuscripts. Initiatives include: Archives West development, New Archives West infrastructure, Expand Alliance Harvester to Enable ArchivesSpace to Archives West Harvesting, ArchivesSpace hosting, Archives West management	Unique & Local Collections Team	Operational

Other Approved Activities (all led by Alliance central staff):

Improving Organizational Communication	Alliance-wide event development and support	Capacity building for member staff and organization	Centralized Management of System Configurations / IT infrastructure management
Documentation and dissemination of collaborative work present and past	Engagement and outreach	Ex Libris Relationship management	Executive support
Group management	Statistical/data reporting		