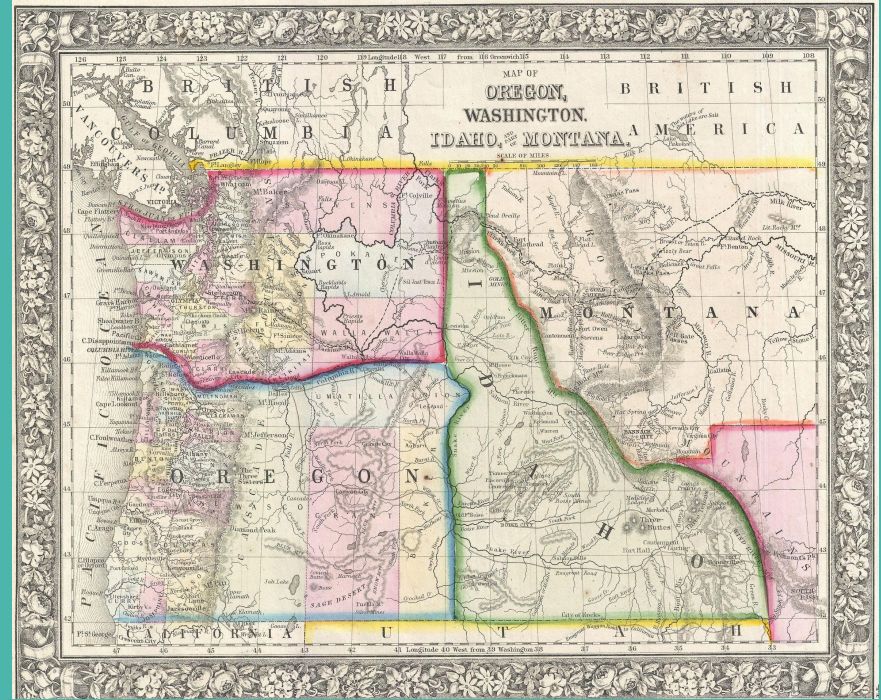

Exploring the depths:

— Collaboration and Customization —

Overview.....

- The Orbis Cascade Model
 - Governance
 - Policy creation
 - Training
 - Assessment

Orbis Cascade Alliance



Orbis Cascade Alliance : Demographics

39 Members...

Private & Public Colleges, Universities, Community Colleges, in Oregon, Washington, and Idaho

Orbis Cascade Alliance : Demographics

Serving 280...

Colleges, universities, archives, museums, in Oregon, Washington, Idaho, Montana, Alaska, Hawaii, and Utah

Orbis Cascade Alliance : Demographics

Resource Sharing : 253,000 items a year

Courier: 305,000 packages a year

Jointly Owned Ebooks: 17,000

E-Journals Subscriptions: 3,910

Databases: 135

Orbis Cascade Alliance : Demographics

Guides to Archival Collections: 23,000

Consortial Assessment Activities

Conferences and Workshops

Distributed Print Repository

Shared Systems : Discovery, ILS, Cloud

Orbis Cascade Alliance : Demographics

Non-Profit Corporation

9 staff, no central funding, 23 years old

Orbis Cascade Alliance : Core

1. **Work Smart**
2. **Design of Engagement**
3. **Innovate to Transform**

Orbis Cascade Alliance: Governance



Orbis Cascade Alliance: Governance

Alliance Teams are charged with specific tasks determined by the Board and Council. Teams associated with a program also serve in an advisory capacity to the program manager.

Each Program has a Team (5-7 members)

- Chair
- Chair Elect
- Council Liaison
- Members at large
- Program Manager

Orbis Cascade Alliance: Governance - Teams

Calls for nomination for teams go out every year.

- Anyone can be nominated
- Anyone can self nominate

Program Managers Review the list of nominations and make some recommendations to the Board

Board Appointed teams

Orbis Cascade Alliance: Governance - Teams

Team members are not representing their institution.

Team members represent what is best for the Consortia.

Sometimes what is good for one is not good for the other.



Orbis Cascade Alliance: Governance - Teams

Workload

The work of the chairs and committee members should be adjusted by their institution so that consortial work is not seen as:

Extra-Volunteer- As time allows

But as an important formal assignment

Orbis Cascade Alliance: Governance - Teams

Workload

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Orbis Cascade Alliance: Governance - Working Groups

Teams can form ad hoc working groups that are chaired by a team member with membership drawn from staff at member libraries.

The must be assigned a doable task and given a deadline.

Orbis Cascade Alliance: Governance - Representatives

Each member institution appoints a representative to each program. Representatives speak for their institution on matters related to the program and are consulted by the program and team as needed.

Orbis Cascade Alliance: Sharing - Policies

Every Alliance library agrees to follow the same procedures and policies.

Who's covered:

Currently enrolled students; currently employed or retired faculty and staff, a limited number of special patrons

Orbis Cascade Alliance: Sharing - Policies

What's Covered:

Generally circulating materials.

Borrowing Limit:

Maximum number of Alliance items that an individual patron can have out on loan is 200.

Orbis Cascade Alliance: Sharing - Policies

Loan period:

Generally circulating materials: 6 weeks. Other Materials may be circulated for either 6 weeks or 6 days. No renewals.

Recall:

No direct recall for individual patrons; staff may recall when necessary.

Orbis Cascade Alliance: Sharing - Policies

Competing Needs:

Items may be checked out to a patron at owning site (item in hand) even if a sharing request has been received.

Lending fees:

Alliance members do not charge each other for sharing requests or ILL returnables

Orbis Cascade Alliance: Sharing - Policies

Loan Sequence:

Local, Group, ILL.

Visiting Patron:

Students, faculty, and staff who are currently enrolled or employed by an Alliance Library have borrowing privileges when visiting any other Alliance library.

Orbis Cascade Alliance: Sharing - Policies

Green Flag/ Returning Materials

Fines, Fees, Overdue, Lost, Irreparably Damaged

Course Reserves

Return it Clean

Orbis Cascade Alliance: Training

- Train the trainer
- Open Web Meetings
- Documentation Sharing
- Topic based Calls
- Support Questions Monitoring
- Click Guides

Orbis Cascade Alliance: Training - L&C Example

Process Items we're **BORROWING**

1. In Alma menu, **select** Receiving Items (under Fulfillment>Resource Sharing)
2. **Select** Barcode in the Identifier Type Field
3. In the Barcode field, **Scan** the item's barcode and **click** Ok
4. A **pop up window** will appear
5.

Lessons



Inside scoop:

- If you dream it you can do it
- Little steps add up to huge advances
- You can never over communicate

Inside scoop:

- Schedule breaks
- Anticipation is worse than reality
- Everyone is stressed so tread with kindness
- We all want this to work, and to work extremely well

Inside scoop:

- TOUs Matter
- Display logic is tricky
- User Roles are important
- Ok, Everything related to configuration is tricky!

Inside scoop:

- There is only so much “change” you can throw at someone before they break
- Positive, but not blind, viewpoints will take you far
- No one is out to “get” anyone

Inside scoop:

- Do not be afraid to ask questions or to question previously made decisions or assumptions
- Take time off - No seriously do this one!!!!
- Communicate until you're blue - then purple



Ask anything....

Thank you !

— Anya N. Arnold —
