Depth of Collaboration:
Orbis Cascade Alliance

Anya N. Arnold
37 Members
Private & Public Colleges, Universities, Community Colleges in Oregon, Washington, and Idaho

Serving 280 colleges, universities, archives, museums in Oregon, Washington, Idaho, Montana, Alaska, Hawaii, and Utah

Non-profit corporation, 8 staff, no central funding, 20+ years.
Central Oregon Comm. College
Central Washington University
Chemeketa Community College
Clark College
Concordia University
Eastern Oregon University
Eastern Washington University
George Fox University
Lane Community College
Lewis & Clark College
Linfield College
Mt. Hood Community College
Oregon State University
Oregon Health & Science Univ.
Oregon Institute of Technology
Oregon State University
Pacific University
Portland Community College
Portland State University
Reed College
Saint Martin’s University
Seattle Pacific University
Seattle University
Southern Oregon University
The Evergreen State College
University of Idaho
University of Oregon
University of Portland
University of Puget Sound
University of Washington
Walla Walla College
Warner Pacific College
Washington State University
Western Oregon University
Western Washington University
Whitman College
Willamette University
Review

- Vision not a tool
- If we envision it, they will build it
- Consensus, decisions, drafting plans
- Laying the foundation
- Building the house
Migrate 37 members to:

Ex Libris Alma and Primo Direct.
Six **BIG** projects at **ONCE**!

Legacy ➔ Next generation

37 ➔ 1

 Acting as 1

Unified Discovery Platform

Re-Implementing Resource Sharing

Creating A New Resource Sharing
What does that mean???

We are replacing

— Integrated Library System
— Discovery Systems
— Link resolvers/knowledgebases
— Standalone proxy servers
— Electronic Resource Management systems
— Local servers
Building the House

**Sept 2012**
- Project manager begins
- Appointments to Working Groups made
- Contract with Ex Libris signed

**Oct-Dec 2012**
- Shared ILS Team begins work
- Cohorts finalized
- Pre-Implementation planning with Ex Libris begins

**Jan-June 2013**
- Kick Off Meeting
- Data migration
- System configuration
- Training
Building the House

June 2013
Cohort 1 went live!

Dec 2014
Cohort 2 went live!

June 2014
Cohort 3 went live!

Jan 2015
Cohort 4 WILL GO live!

Jan 2015
Resource Sharing Migration WILL GO live!
Overall
Laying the Foundation

✓ Extracted sample data for Ex Libris analysis
✓ Turned in Cohort 1-4 Alma Customer Information Forms
✓ Developed a basic understanding of system architecture and functionality
✓ Decided on how to build the Network Zone
✓ Decided to migrate acquisitions and ERM data
✓ Turned in all Alma migration forms
Laying the Foundation

✓ Cohort 1-4 data extraction
✓ Alma Sandbox environments for Cohort 1-3
✓ Basic WebEx based training
✓ Summit (NRE) Integration testing and collaboration
✓ Functional workshop training
✓ Decided on specific go live dates for Cohort 4
Laying the Foundation

- Testing, Testing, Testing
- Turning in Cohort 1-4 Primo configuration forms
- NCIP between OCLC and Ex Libris
- Created Cutover documentation
- Created marketing plans
Drafting Plans

Working together

Project management in a many-to-many environment
Developing new talent and avoiding burn out

Shock of the New

Concepts
Data structures
Vocabulary
Capabilities

Working relationships (libraries, vendors)
Communicating the WHY?

Not an end in itself

... because of the past

... because of the future
The past ...

Legacy systems
Based on limited bandwidth, storage, lack of standards
Lagging functionality
Hard to:
- Innovate
- Integrate
- Extract data
The future ...

Better services for students, faculty, staff
Improved resource sharing ... a better Summit
Improved staff tools
New opportunities, enabling
  • Collaborative Technical Services
  • Vision of “one collection”
New options
  Alma, Intota, Sierra, WMS, etc.
Communication

Email Lists internal to Alliance Members

Google Docs

Shared ILS Docs

GoToMeeting—biweekly and weekly for each area

In person meetings
Communication-Ex Libris

Joint email list

WebEx meetings –

scheduled weekly, sometimes more...
Communication – Face to Face
“The price of inaction is far greater than the cost of making a mistake.”

Meister Eckhart
Consensus

• What do we want?

• When do we want it?

• Who is going to get us there?
Envision

• What do we want to accomplish…. Why
  – 20 years ago
  – 3 years ago
  – Today

• Is there a shared and unified understanding of that vision?
  – Game of telephone
  – Plato’s Forms
Learning is a gift. Even when pain is your teacher.