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# Program Report: Orbis Cascade Alliance Summit: A Library Management Service Model for the Future

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## *Program Report*

### **Orbis Cascade Alliance Summit: A Library Management Service Model for the Future**

*Ellen McGrath  
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Christina Tarr (University of California School of Law Library) coordinated and moderated this program, which consisted of three speakers from the University of Washington, Gallagher Law Library: Penny A. Hazelton (Director), Richard M. Jost (Information Systems Coordinator), and Alena Wolotira (Reference Librarian). In her introduction, Chris explained that this program, which was sponsored by the Online Bibliographic Services Special Interest Section (OBS-SIS), came about due to the high level of interest generated by the previous year's OBS Local Systems Roundtable meeting, which also focused on the Orbis Cascade Alliance. Unfortunately I did not attend the American Association of Law Libraries (AALL) Annual Meeting in Seattle in 2013. But in reading the report of the roundtable in last September's conference issue of *TSLL*, it is clear that these two presentations are excellent companions, with little repetition. This clearly illustrates the fact that long-term projects such as this one do warrant multiple AALL conference programs on the seemingly same topic, even in back-to-back years, as in this case.

Richard began with a brief background/overview of the system migration project, as well as a report on the systems issues experienced by the Gallagher Law Library. The Orbis Cascade Alliance has 37 members serving 260,000 students at the private and public universities and colleges of Oregon, Washington State, and Idaho. The vision of the Alliance was summed up by Richard as efficiency and productivity, resulting in the delivery of outstanding services, programs, and collections. He said that Ex Libris was ultimately chosen as the system vendor because the company seemed to best understand the Alliance's philosophy and its "new" concept of a consortium. The University of Washington was in the first of four cohorts to "go live" and was the largest institution to migrate, starting on July 21, 2013. Richard described Gallagher Law Library's participation as a double migration. The first step was to move their data from their own III system into the University's III system, and then it was moved from there into Alma, the staff or back-end next generation library management system from Ex Libris. Speaking as someone who has already endured two system migrations in my career, the thought of a double migration like this struck terror to my heart!

And that terrible feeling grew as Richard went on to describe the many challenges they ended up facing. Alma's design includes multiple zones (institutional, network, and community), but the network zone piece was not actually built yet. The training provided by Ex Libris was of no help. Problems encountered with the data migration revealed Alma's lack of flexibility. One year later, Richard said they are still learning, cleaning up data, and developing policies and procedures. Yet, he amazed me by saying it was all worth it! He emphasized that there are many current and potential rewards to this migration. Shared cataloging and collection development opportunities top the current list, with the added benefit of having all University of Washington materials accessible in one place. Potential benefits include the staff and cost savings to be realized, along with the opportunity to collaborate with the other law libraries in the Alliance.

Alena was up next and gave the reference perspective from "in the trenches." It was nice to hear that a conscious effort was made to include public and technical services staff equally in the process. Alena's role focused on communication, training, and liaising, and she delivered an account of Gallagher Law Library's (and her own) experience laced with a good amount of humor. The list of negatives continued: the Ex Libris training webinars were almost incomprehensible, the My Library account feature did not work, there was no citation management function, no permlinking, no de-duplication of records (from double migration), and multiple logins were required. Alena said that Ex Libris staff did work with them to try to address these issues, but resolution was not always the outcome. Staff tried to stay optimistic, but they eventually gave up. In September 2013, the decision was made to go with WorldCat Local as the discovery interface, rather than Primo (Ex Libris' discovery product) for one year. They will reevaluate this for the upcoming 2014/2015 academic year.

On a more personal note, Alena shared many insights about surviving the process. She said it was essential to develop a system to manage the multitude of meetings and the associated e-mails that resulted from being on so many different groups and subgroups. She emphasized the importance of being a listener and a cheerleader and being prepared for lots of

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togetherness with your colleagues. Also, only venting about problems all the time reaches a dangerous point that should be avoided. Alena lamented that the Gallagher Law Library sacrificed some of its autonomy and power through this process. One example, repeated by more than one speaker, is that law faculty members are now assessed fines for overdue items. This has not been a well-received change in policy, as you might imagine.

Penny recognized the huge amount of work invested in this project by her staff. She characterized the past year as the worst of her life and went on to describe some of the more human impacts of this process. Penny bore witness to the struggles of her staff in dealing with the major frustrations of everyone “going back to zero” over and over again and more importantly, of having to adjust to delivering what they saw as a lower level of service to their users. She is still waiting for the delayed gratification of achieving major efficiencies and service goals. Penny finished up with general observations about the current state of systems. In her estimation, integrated library systems of today will never be stable and they are no longer built by the vendors, but rather by the customers. So it is essential that customers band together as in the Orbis Cascade Alliance to have even a chance of making systems development successful. Also, rote learning is out. Staff must explore, test, and problem-solve all the time. And they must re-do it repeatedly, because systems are not stable and keep changing all the time.

For me, the highlight of the program was Alena’s sharing (and spirited reading) of an actual message from one of their faculty members, two weeks into the migration process:

In this “upgrade” you seem to have forgotten that many people know, to some considerable extent, what they want and need to get to it quickly. What you have given us is a system that says “how about this, how about that, would you like some ice cream, or perhaps a roasted chicken, a new pair of shoes?” I do not wish my library to look like a Turkish bazaar. I cannot think who would find this approach useful ... designed by a committee of software enthusiasts, and idealistic librarians who would like to make us into something we are not.

I found this program very useful, as my university library system is preparing to choose and migrate to a new system over the next few years. As a non-autonomous law library, we have always had to conform to the rest of the libraries’ systems policies, so that is at least one major hurdle we will not have to clear. The three speakers had experienced library systems trends that I too have noticed (though not as directly as they have), which gave me great comfort. It inspired me to hear how they faced their many obstacles with grace and good humor, and ultimately, optimism that they will someday attain their stated vision. If they can do it, so can I. ☺

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