Moving Mountains: Migrating a Consortium to a New Integrated Library System

Presented by Molly Blalock, Bronwyn Dorhofer, Turner Masland, and Anya Arnold
Who Is the Orbis-Cascade Alliance?

- Founded in 1993
- Made up of 37 academic libraries in Oregon, Washington, and Idaho.
- Serves 275,000 students and faculty
- Resource Sharing: 253,000 books a year, 17,000 Ebooks, and 3,910 Ejournals, shipping 305,000 packages
Why a Shared ILS?

We had…
Limited Bandwidth
Lack of Industry Standards
Hard to:
• Innovate
• Integrate
• Extract Data
Why a Shared ILS?

We wanted:

- Better services for all patrons
- Improved Resource Sharing
- Improved Staff Tools
- Collaborative Technical Services
- Vision of being ONE collection
Why ExLibris?

- RFI
- RFP
- Demos
- Partnership for the Future
- Recommendations
- Vote
- Current state of affairs
Preparing for the Migration

- Start early!
- Form an ILS team
- Train your staff
- Play in the “sandbox”
- Communicate with colleagues
Course Reserves in Alma

- UO – physical items on Alma, electronic on CMS
- PSU – both physical and electronic materials on Alma
  - Migrated to Alma slowly over the course of the summer
  - 24 hours lag time between Alma and Primo
Benefits of a Shared ILS

- Customization
- Automates and expands services
  - Requesting
- Makes Resource Sharing easier
  - Discovery
  - Pick Up Anywhere (coming soon!)
Benefits of a Shared ILS

• Increased collaboration between libraries
  • Circulation and Resource Sharing Working Group
  • Discovery Working Group
  • Normalization Rules
  • Training Working Group
  • Acquisitions and Serials Working Group
  • Cataloging Working Group
Benefits of a Shared ILS

- Learning to manage change
  - Rapid change is our new environment
  - Migration as exercise
  - Access Services and Resource Sharing staff as ambassadors
Recommendations

- Emphasis on collaboration - both with departments in your library and libraries in the consortium.
- Work with staff and student employees on how to manage change.
- Ongoing training sessions and webinars for ILS.
Lessons Learned

• Anticipation is worse than reality!
• Important to evaluate current policies and procedures
  • Document new workflows
• Share expertise and documentation
  • Staff intranet
  • Connect with other libraries in consortium
Thank you!

• Questions?

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