

ORBIS  
CASCADE  
ALLIANCE



# Orbis Cascade Alliance Archives & Manuscripts Service Meeting

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June 1, 2023 - 10:00-noon

# Welcome!

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1. Alliance and ULC program highlights
2. DEI statements and archival collections
3. Stretch break!
4. The Alliance strategic plan and the A&M service
5. Meeting adjourned / social time

[Alliance Code of Conduct](#)

# Orbis Cascade Alliance Highlights

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# Alliance Highlights

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- Strategic planning
- Executive Director leadership transition
- Increased support for DEI and consortial training

# Unique & Local Content Program Highlights

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# ULC program highlights

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## Unique & Local Content Program

“The program supports solutions for unique content needs, recommends consortium-wide practices, and supports an integrated approach for publishing, storing, discovering and preserving resources in our special collections, archives, and digital repositories.”

A&M service is one component of the program, which also supports best practices and education around unique materials in the shared ILS, open educational resources, copyright education, and consortial Dublin Core best practices.

# ULC program highlights

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## 2022-2023 ULC Team

- Gayle O'Hara, chair (WSU)
- Carleigh Hill (Whitworth)
- Kat Lewis (UW)
- Robert Perret (U Idaho)
- Zach Welhouse (OSU)

The ULC Team provides member leadership for the Unique & Local Content program, charges and appoints working groups, and holds open calls with the community.

Open calls this year: 2-part series on teaching with primary sources, discussion of DEI in collection description, plus Team and working group reports

# Building a National Finding Aid Network

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NAFAN is a 2.5-year IMLS funded research and demonstration project to create a “blueprint” for a national finding aid network

## Goals:

- Support the broadest possible range of contributing institutions and minimize barriers to participation
- Scale researcher discovery and access to a broader range of collections
- Create a network is community-driven, community-sustained, and community-governed

<https://confluence.ucop.edu/display/NAFAN>



This project was made possible in part by the Institute of Museum and Library Services, through grant [LG-246349-OLS-20](#). The IMLS is the primary source of federal support for the nation’s libraries and museums.





# Building a National Finding Aid Network

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Project concluding soon!

Key deliverables:

- Complete research findings from OCLC
- Requirements, blueprint and proposal for launching network after 2023
- Final report including proposed model for sustainability

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# Building a National Finding Aid Network

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Proposed core functions of the network:

- Decentralized finding aid hosting; not limited to EAD
- Indexes finding aids already published *and* supports hosted publishing
- Publicly accessible portal
- Community-sustained, not reliant on grant funds

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# ULC program highlights

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## ArchivesSpace & Archives West support

- Triage and respond to help requests; provide documentation, training, and troubleshooting
- Manage LibraryHost contract and vendor relationship; coordinate version updates
- Provide central tech support and development for Archives West

Commitment to prompt, friendly, “hands-on” help - no dumb questions, no shame!

*Keep sending those help requests!*

Archival Collection  
Discovery & Management  
Working Group

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# Unique Materials in the SILS Standing Group

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# UMSILS highlights

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“The Unique Materials in the SILS (UMSILS) standing group studies and responds to issues affecting unique materials in the Alliance’s Shared ILS (SILS).”

## **2022-2023 UMSILS Standing Group**

- Kat Lewis, chair (UW)
- Dulce Kersting-Lark (U Idaho)
- Philip Vue (UP)
- Olivia Wikle (U Idaho)

# UMSILS highlights

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## Digital Collections in Primo

- Reviewed work of a prior (2017-2018) digital collections in Primo working group. Determined that the Alliance needed to better understand what members are currently doing with digital collections metadata in Primo, what their goals are, and what opportunities and gaps we have.
- Fall/winter survey of institutional reps received responses from 26 Alliance institutions.

# UMSILS highlights

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## Digital Collections in Primo

### Survey findings:

- Majority of Alliance institutions are not using Primo for digital collections discovery.
- 9 institutions reported supporting item-level discovery of at least some of their unique digital collections via Primo. A few more support collection-level discovery, or both.
- ETDs and other materials that fit into standard monographic cataloging practices are more likely to be represented in Primo.
- Lack of staff capacity for specialized, “high-touch” metadata work is the most significant challenge for those not using Primo



# UMSILS highlights

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## Digital Collections in Primo

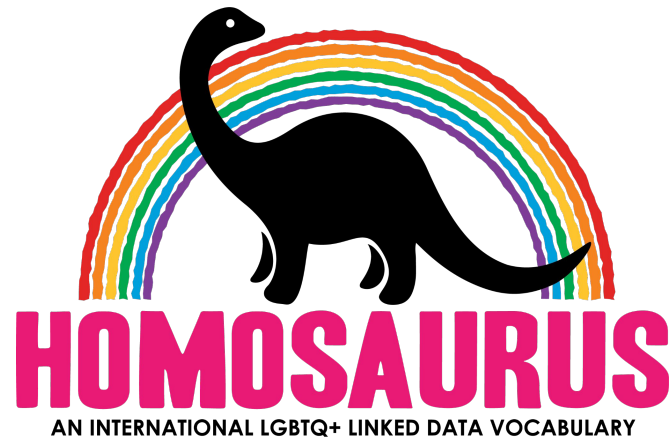
- Few Alliance institutions are in a position to participate in a major initiative around digital collections discovery in Primo.
- Skepticism remains about the impact of using Primo for digital collections discovery. Poor search engine exposure in comparison to digital collections platforms is a key concern.
- Members who are interested in exploring would benefit from education about options already available to them (Alma Digital, metadata harvesting from other platforms into Primo)

# Unique and Local Content: Alternative Controlled Vocabularies

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**Unique Materials in the SILS Standing Group finding (2022):** Members want to use alternative controlled vocabularies to support DEI in descriptive practices, but need implementation models, best practices, and guidelines.

UMSILS collaborated with Cataloging Standing Group (CSG) to identify training on Homosaurus (an international linked data vocabulary of LGBTQ+ terms) as a high-impact project.



# Archives West Development Highlights

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# Discussion on DEI-Related Statements and Activities

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# Pre-discussion survey

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- Survey sent with registration in preparation for DEI discussion with two questions:
  - Do you have a DEI-related statement specific to your archival collections? Why or why not?
  - What would help support your DEI work?

# Existence of statement

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- 12 responses total
  - Do you have a DEI-related statement specific to your archival collections?
    - 5 responded their archives has a DEI-related statement
    - 3 are working on statements or have some components
    - 4 do not have statements
  - Respondent comments
    - “Technically, yes. The collection development policy now highlights a commitment to DEIA”
    - “No. The library has a statement but I have not created on for archival collections.”
    - Some comments about harm statements and descriptive remediation

# What would help support your DEI work?

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- 11 responses total, including 1 NA
  - Needs identified include opportunities for collaboration with other archivists, case studies and examples, tools and how-to resources, institutional support
- “We have strong internal support...A challenge is the technical needs associated with adopting community-centered language and metadata for description...”
- “[need for] Time and staff”
- “ A&M meeting will help us to review what others have done”

# Stretch break!

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See you in 15 minutes!



# The New Alliance Strategic Plan and the A&M service

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# Questions to think about:

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At your job...

1. What is your greatest challenge?
2. What makes you most excited about the future?

# The new strategic plan launches in July!

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The new strategic plan identifies high-level priorities reflecting what Alliance members aspire to accomplish together by the end of 2025.

- Does not prescribe specific projects or initiatives, but helps identify areas where work should be re-aligned or newly developed.

More about the process:

<https://www.orbiscascade.org/about/council/council-resources-list/2022-2023-process>

# Past strategic plan - what have we done?

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## High-level strategic initiatives for A&M since 2019:

- Fully implement ArchivesSpace as an opt-in service
- Re-develop Archives West to ensure sustainability, technical robustness, and responsiveness to user needs
- Develop a process for harvesting finding aids from ArchivesSpace to Archives West

# Past strategic plan - what have we done?

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## Achieved all major objectives!

- Rebuilt Archives West on stable, sustainable open-source platform (BaseX)
- 30 institutions using ArchivesSpace through Alliance contract
- Launched custom ArchivesSpace-to-Archives West finding aid harvester

## ...and more

- Completed WACG-compliant updates to Archives West public interface
- Developed new features in AW Management Tools based on working group recommendations, including self-serve analytics and deletions
- New and updated documentation and tutorials for AW and ASpace
- Ongoing partnership with NAFAN

# The New Alliance Strategic Plan

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## 2023-2025 Strategic Themes

- Optimize digital resource sharing through strategic use of tools and content
- Realize the vision of being one collection in ways that improve service for users and create capacity for members
- Leverage open content and practices to support educational equity and member sustainability
- Foster a vibrant community that offers inclusive engagement for member library staff

# The New Alliance Strategic Plan

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## What's *not* changing?

- Support Archives West & ArchivesSpace as sustainable, open source services
- Invite community engagement through open calls, special events, service opportunities, and online resources
- Continue key partnerships such as NAFAN (in whatever form it takes next!)

# The New Alliance Strategic Plan

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## What's changing?

**Unique & Local Content Program** will become **Open Strategies & Digital Content Program**, better reflecting the breadth of initiatives and services.

Reduce “asks” of member staff; ensure those asks are high-impact, strategic, and well-defined

- ULC Team sunsets in June. Future working groups submit deliverables directly to Executive Director and Board rather than going through Team layer
- Working groups will focus more on high-impact, well-scoped, limited duration projects. Decrease in standing groups with multifarious charges and long-running “maintenance” projects
- A Steering Committee may meet periodically to advise the Program Manager, solicit member feedback, and shape projects for working groups



# Possible new initiatives

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- Identify more processes for streamlining flow of metadata between Alliance-supported platforms (AW, ASpace, shared ILS); provide member education on best practices
- Review (and possibly revise) policies on data sharing and Creative Commons licenses for finding aids; support member education on open finding aid data
- Identify opportunities for sharing collections digitally and/or physically between institutions
- Review A&M membership model with focus on expanding participation of small institutions
- Assess training and documentation for Archives West and ArchivesSpace
- Program Manager conducts site visits for training, networking, feedback
- Assess Archives West public interface, with focus on user experience and inclusion

# Alliance Strategic Plan

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Knowing we can't do all of these initiatives between now and 2025, which ones:

- Would help resolve your greatest work challenges?
- Make you most excited about the future?

**Open discussion and feedback - we don't have to agree or reach consensus - and there will be lots of other chances to share your thoughts!**

# Business meeting adjourned!

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Help us improve future meetings!

Fill out our event evaluation survey!

**<https://www.surveymonkey.com/r/CJRVZQ8>**

*Coming up:* Social time in breakout rooms