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## **ORBIS: Grassroots academic partnership**

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Orbis, now a consortium of 14 four year college and university libraries in Oregon and Washington, was born when the Meyer Memorial Trust awarded the University of Oregon Library a grant of \$259,000 to develop a union catalog for five Oregon University System institutions in August 1993. Those original five—the University of Oregon, Eastern Oregon University, Southern Oregon University, Western Oregon University, and the Oregon Institute of Technology—were soon joined by Linfield College and Willamette University. By

the end of 1995 the University of Portland, Lewis and Clark College, George Fox University, Reed College and Whitman College were members. Oregon State University requested membership in 1996 and the University of Puget Sound in 1997. Although membership spans two states, currently the greatest distance between two Orbis libraries is within Oregon—between Eastern Oregon in La Grande

and Southern Oregon in Ashland. Over 70 percent of the students in Oregon's four-year institutions are part of the Orbis consortium.

From the first, Orbis embodied several principles that still characterize the organization. Primary among these are the public-private nature of the organization, its grassroots approach to projects, and the equality of each partner. Each library contributes to the enterprise in a variety of ways—in staff time given to projects, in paying an equitable share of the initial and ongoing costs, and in contributing a number of unique titles to the catalog itself. Orbis has a very small staff, with the first person hired in July 1994 and the second in December 1996. This means that librarians and other staff from member libraries contribute significant time to administrative tasks, committee service, project implementation such as the catalog and circulation, and organizational leadership, particularly in the Orbis Council, the governing body. The University of Oregon has housed the project from its inception and has freely contributed sizable staff time, making possible a good deal of its success. Pragmatism, too, has characterized the consortium, in such areas as the projects it has implemented, issues of management and governance, and its relationship with PORTALS and other organizations.

During the past five years Orbis members have undertaken several successful projects that exemplify these qualities and that have helped member libraries better serve their students and faculty.

**Union Catalog.** The catalog, the first successful Orbis project, came up for public use on

March 8, 1995, merging the records of seven libraries. It was, and remains, the core activity of the consortium, central to Orbis membership. By October 1, 1998, the union catalog comprised records from 13 members and included 2,331,641 unique bibliographic records. Of these about 73 percent were held by a single institution, 90 percent were in the collections of three or fewer libraries, and less than one quarter of 1 percent were owned by 10 or more libraries. A web version of the catalog made its public appearance in May 1996. The Orbis catalog is available to other libraries and individuals either through telnet or the web and currently has 12 public ports.

Oregon State University expects to add its records to the catalog in early 1999, shortly after migrating its OPAC to Innovative Interfaces software. For several years OSU and Orbis struggled to find a practical and cost-effective way to integrate a non-Innovative system into Orbis but did not succeed, leaving open the question of how to make membership and full functionality available to libraries with other systems. A second major addition expected during 1998-99 is loading catalog records for holdings of the Center for Research Libraries, which will also participate in Orbis Borrowing. The annual Orbis membership fee for CRL will include access to CRL collections for all 14 Orbis libraries.

**Orbis Borrowing.** Circulation of books to other libraries through patron initiated requests was a goal of Orbis libraries even before the union catalog was up and running. In August 1994 the Council established an ad hoc committee to prepare a grant request for the Meyer Trust to fund the implementation costs for circulation. In April 1995 Orbis members agreed to the principle of reciprocal on-site borrowing for all students and faculty from each others' libraries, an important step in the private-public partnership of Orbis.

The grant to Meyer Trust was submitted in February 1996 and turned down a few months later. But in May 1996 the 12 Council members voted unanimously to purchase the circulation software plus additional ports for general access and to absorb all staffing costs the new system would require. The implementation costs, which members decided to share equally, totaled \$21,250 for each library. Once this decision was made and the money committed, the group decided to move forward as quickly as possible. The Orbis Borrowing Committee was established at that same meeting. Like other Orbis committees the OBC required hours and hours of working meetings both in person and over the Internet.

Decisions relating to patron initiated borrowing, or Orbis Borrowing as it was soon called, tested the cooperative and collegial nature of the consortium since different libraries often had different student and faculty needs and traditions. In the end, and after much

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discussion, the Council reached compromises acceptable to everyone. Orbis Borrowing would be limited to students, faculty and staff (all as defined by each institution) and all groups would be treated equally in terms of both borrowing period and fines. Loan periods would be for three weeks with no renewal, although this issue should be revisited once Innovative makes holds and recalls available in its union catalog system. Fines would be steep, \$.50 per day for 10 days, then increasing to \$1.00 a day with a \$20 maximum; service charges would be set at \$15 per item; and replacement costs would be fixed at \$60 for each book. The borrowing library would assume responsibility for lost and damaged books. Service charges and replacement costs go to the lending library, while fines remain at the borrowing library, a pragmatic decision since some libraries never receive their fine money. The goal was delivery to the borrower's library within 48 hours after a request was made. Orbis Borrowing was opened to students and faculty on March 10, 1997.

Patron initiated borrowing was an instant and resounding success. During the first full fiscal year of operation, July 1997 through June 1998, some 58,800 items were requested and loaned via Orbis, the vast majority within the 48-hour goal. During peak activity about 1,100 courier book bags are in use, being packed, transported, or unpacked. Statistics for

1997-98 (see Table 1) reveal that the University of Oregon was both the largest lender and the largest borrower in the system. The second largest lender was a private institution, Whitman College, and the second largest borrower was also a private college, Lewis and Clark. The five participating libraries from the Oregon University System borrowed a total of 22,061 books, 37.5 percent of all the transactions. The private colleges and universities both borrowed and loaned more books per FTE student than the public institutions.

What impact does Orbis Borrowing have on ILL? Table 2 gives some preliminary figures for three libraries. Both Linfield and Reed showed reductions in both borrowed and loaned returnable items (books) between 1995-96, the last full year before Orbis Borrowing, and 1997-98, its first full year of operation. The University of Oregon, although experiencing a slight decrease in ILL books borrowed, had a slight increase in books loaned. All three libraries showed substantial increases in overall borrowing and lending activity in Orbis Borrowing and ILL combined.

Table 1  
Comparisons—Orbis Borrowing, FTE and Holdings  
1997-1998

	Loaned Items	Loaned - % of Orbis	Borrowed Items	Borrowed - % of Orbis	FTE - % of Orbis Total	Holdings - % of Items	Unique Records - % of Orbis
<b>Eastern Or U</b>	1,867	3.2%	1,801	3.1%	3.5%	2.7%	3.7%
<b>George Fox</b>	2,097	3.6%	4,353	7.4%	4.4%	2.8%	3.1%
<b>Lewis &amp; Clark</b>	4,111	7.0%	7,144	12.1%	6.5%	7.0%	7.0%
<b>Linfield</b>	2,723	4.6%	6,386	10.9%	4.8%	2.8%	1.6%
<b>OIT</b>	1,149	2.0%	1,510	2.6%	4.3%	1.5%	1.8%
<b>Reed</b>	3,842	6.5%	6,339	10.8%	2.9%	7.1%	5.8%
<b>Southern Or U</b>	5,008	8.5%	5,155	8.8%	9.0%	6.7%	4.2%
<b>U of Oregon</b>	17,388	29.6%	9,569	16.3%	36.0%	39.5%	50.1%
<b>U of Portland</b>	2,858	4.9%	2,232	3.8%	5.7%	3.0%	2.3%
<b>U of Puget Sound</b>	4,876	8.3%	1,898	3.2%	6.4%	9.0%	7.3%
<b>Western Or U</b>	2,370	4.0%	4,026	6.8%	8.3%	4.2%	1.6%
<b>Whitman</b>	6,269	10.7%	2,493	4.2%	3.1%	7.2%	3.6%
<b>Willamette U</b>	4,242	7.2%	5,894	10.0%	5.2%	6.5%	8.0%
<b>Total</b>	<b>58,800</b>	<b>100.0%</b>	<b>58,800</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Table 2  
ILL Activity  
Before and  
After Orbis  
Borrowing—  
Books

	Borrowed 95-96 ILL	Borrowed 97-98 ILL	Borrowed 97-98 Orbis	95-96 ILL	97-98 ILL	Loaned 97-98 Orbis
<b>Linfield</b>	5,345	772	6,386	2,820	1,025	2,723
<b>Reed</b>	3,426	2,191	6,339	2,347	2,011	3,842
<b>U of Oregon</b>	6,671	6,556	9,569	12,290	13,162	17,388

The numbers for Orbis Borrowing will go up in the future as more students and faculty learn to use this service and as Oregon State University becomes a fully participating member. To attempt to balance the borrowing/lending ratio, Orbis changed the selection of the lending library from a purely random assignment to a formula that puts last year's largest net borrowers at the top. Further improvements will hopefully expand the service to include journal articles; during 1998-99 an Orbis task force will be looking into how this might be accomplished.

**Electronic Resources.** Orbis members also intended from early in the consortium's life to go beyond providing simply a union catalog and borrowing among libraries. As early as 1993 the Council discussed how to include reference databases and in September 1995 the Reference Database Committee held its first meeting. At that time the concept was to load bibliographic and full-text databases into the Orbis catalog, but as the web emerged as an increasingly more important access vehicle the emphasis shifted to creating a mechanism for purchasing cost-effective web access to a variety of databases.

The February 1997 Council retreat made creation of an electronic resources committee a high priority. The Task Force on Electronic Resources (TFER) with a member from each Orbis library held its first meeting in June and has continued to meet about monthly. Initially TFER expected to issue a report recommending databases Orbis should license as a consortium, but a different approach soon emerged. Since few databases were of interest to all libraries but many services were of interest to some libraries it made sense to emphasize consortial purchases, open to any library desiring a particular database and willing to pay, and allowing any library to decline to participate. Each library would pay for the databases it had selected from its own budget. Individual Task Force members undertook investigation of databases, contacts with vendors, gathering tentative price information, presentation to the group, and follow-up as libraries dropped out of, or into, the group desiring a particular database. With a lot of hard work by TFER members, it accomplished a great deal in a relatively short time.

By fall 1998 TFER had looked at over 100 electronic resources and had arranged consortial purchase for a significant number of them, including Congressional

Compass, STAT-USA, Britannica Online, PsycINFO, Cambridge Scientific Abstracts, ComIndex/ComAbstracts, Poem Finder, and FirstSearch among others. To maximize impact and minimize effort, TFER cooperated with a similar committee in PORTALS and with libraries in Washington on the FirstSearch and Britannica Online purchases.

Several issues concerning electronic resource licensing still need attention, from vendor negotiation to the best way to expedite review and renewal processes and how to reduce the amount of time spent by everyone on TFER activities. When appropriate and feasible the group tries to include non-Orbis members in its activities but policy is still emerging in this area. The question of how to allocate costs also continues to vex Orbis, especially since vendors vary so much in their charging algorithms. The guiding principles, that all participating libraries should benefit and that no library should pay more than it would by purchasing individually, have meant that allocation formulas have varied from service to service. The basic allocation formula has an across the board figure plus a weighted amount based on student FTE and materials budget. Orbis has also begun playing a role as fiscal agent for Oregon state-wide licenses, raising the question of how it should recover costs for services to non-Orbis libraries.

Orbis is still very much a work-in-progress. It has been successful because of the shared vision of the participants, the emphasis on achievable goals exemplified by Orbis Borrowing and TFER activities, and every library's willingness to contribute both money and staff to the organization's work. But it is not a static organization. It will continue to change as new opportunities arise, as technology develops, as new activities are undertaken, and as membership issues are solved. The next several years should prove to be an exciting time for this grassroots academic partnership. **Q**

Orbis can be found on the web: Union Catalog <http://orbis.uoregon.edu>

Homepage is at <http://libweb.uoregon.edu/orbis/>