Consortia Value: The Orbis Cascade Alliance

Nancy Slight-Gibney, University of Oregon
Donna Reed, Portland Community College
Steve Hiller, University of Washington
Faye A. Chadwell, Oregon State University

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The Orbis Cascade Alliance

• 37 academic libraries in Oregon, Washington and Idaho, serving more than 258,000 students

• Public, private and community colleges

• Resource sharing

• Courier service

• Cooperative purchasing/licensing

• Sharing expertise

• Coming soon! Single, shared ILS
Assessment Task Force Charge and Membership

**Charge:**

- Consider and provide recommendations concerning the implementation of a consortial approach to assessing and communicating the value, outcomes and impact of the Alliance.
- Timeline = 8 months

**Membership**

- Faye Chadwell (Chair, Oregon State University)
- John Helmer (Orbis Cascade Alliance, ex officio)
- Nine members from public, private, and community colleges
Questions to Answer

• What indicates value, outcome and impact?
• What do members want and need?
• What can the Alliance staff provide?
• What are other consortia doing?
Methodology

1. Literature review/discussion
2. Simultaneous data gathering:
   • ICOLC member survey
   • Alliance staff data inventory
   • Orbis Cascade Alliance member survey
3. Interviews with Alliance members
4. Develop recommendations
Literature Review

- Faye Chadwell: *Assessing the Value of Academic Library Consortia*
  - Benefits of consortia in terms of cost-avoidance and expanded buying power
  - Few examples demonstrating value and impact of consortia – a complex task
  - Opportunity to leverage expertise

- Megan Oakleaf: *The Value of Academic Libraries*
  - Impact and outcomes

- Leigh Estabrook: *What Chief Academic Officers Want from Their Libraries*
  - Benchmarking, comparative statistics, and evaluations of costs vs. value
ICOLC Survey

- 5 of 30 respondents provide no assessment data
- Common responses:
  - Outputs/usage
  - Cost per use
  - ROI calculations (databases, courier service, etc.)
  - Cost avoidance calculation for licensed resources
    - based on retail vs. price paid
    - based on initial quote vs. final price paid
    - based on an assigned fair market value
- Other approaches to assessment mentioned:
  - Willingness to pay study
  - Balanced Scorecard
  - User satisfaction survey
Alliance Data Inventory

- 44 metrics identified for Alliance services, products or activities
- Alliance staff indicated availability for each: currently available, possibly available, inconsistent or unknown
- Alliance staff assigned a difficulty level for gathering each: easy, medium or hard
- Reflects substantial current data gathering
- 21 of the metrics were related to resource sharing – with some of the data easy to produce and some may not be possible with current system
Alliance Member Survey

• Position(s) responsible for library assessment?
• Publicly available website with assessment data?
• Which surveys does your library participate in?
• Are you using Alliance data?
• What assessment tools and techniques have you used?
• Rate importance of Alliance data/metrics.
Alliance Member Survey Results
35/37 Libraries Responded

- Responses reflect the diversity of the membership in terms of:
  - Who is responsible for assessment
  - Public website with assessment data
  - Use of Alliance data in assessment activities

- High level of participation in NCES (97%) and ACRL (83%) surveys

- Private colleges and universities contribute data to multiple organizations, including NAPCU (100% of the privates), CCCU and HEDS
Member Survey Results (cont.)

- Almost all libraries do quantitative assessment (97%), far fewer use qualitative techniques.
- Rating the intended audience for Alliance assessment data:
  - Alliance Board of Directors and Council - 86% primary, 14% secondary
  - Administrators of member institutions - 69% primary, 31% secondary
- Rating the importance of having data/metrics on 21 Alliance services:
  - 9 programs or services received at least 80% “important” or “very important”
<table>
<thead>
<tr>
<th>Alliance Program</th>
<th>Member Rated as Primary Data Need</th>
<th>Alliance Staff Rated Ease of Data Gathering</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval Plan</td>
<td>80%</td>
<td>EASY</td>
</tr>
<tr>
<td>Databases</td>
<td>97%</td>
<td>MEDIUM</td>
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<tr>
<td>Ebooks</td>
<td>97%</td>
<td>MEDIUM</td>
</tr>
<tr>
<td>Ejournals</td>
<td>97%</td>
<td>EASY</td>
</tr>
<tr>
<td>Courier</td>
<td>97%</td>
<td>NEED MORE INFORMATION</td>
</tr>
<tr>
<td>Discovery</td>
<td>89%</td>
<td>NEED MORE INFORMATION</td>
</tr>
<tr>
<td>Shared ILS</td>
<td>100%</td>
<td>DIFFICULT AT PRESENT</td>
</tr>
<tr>
<td>Resource Sharing</td>
<td>100%</td>
<td>MOST METRICS EASY, SOME MEDIUM, AND A COUPLE DIFFICULT</td>
</tr>
<tr>
<td>Collaborative Technical Services</td>
<td>83%</td>
<td>DIFFICULT AT PRESENT</td>
</tr>
</tbody>
</table>
Interviews

- What assessment expertise is available to you?
- What do you see as the role of the Alliance in providing assessment data?
- Is there a role for the Alliance in providing a framework for professional development?
- What methods do you use to communicate assessment data/results?
- Review possible outcome measures.
Interview Findings
25 Respondents

- A wide range in local resources available for assessment activities
- Collective demand for analyzed data (reports) as well as raw data
- Uses for data:
  - Publicity and marketing
  - Internal communication
  - Assessment/evaluation/accreditation
Interview Findings (cont.)

- Continuing education for assessment not a primary role for Alliance staff

- Alliance members interested in collaboration on assessment related activities

- Brainstorming outcome metrics - some interesting responses (e.g. assessing facilities) that may not be directly tied to the consortia
Task Force Recommendations

1. Form an on-going assessment group
2. Embed indicators of success into all future planning efforts and new initiatives
3. Develop a common data set
4. Develop an Assessment Toolkit
5. Create a set of “elevator speeches,” testimonials and other documents to help members communicate value
6. Identify professional development needs in the area of assessment
Alliance Board Actions

- Board approved recommendation at July, 2012 meeting
- Ongoing Orbis Cascade Alliance Assessment Team appointed September, 2012
Assessment Team Charge

- The Assessment Team will produce an annual summary report of team activities and recommendations for future action such as:
  - Embed assessment/metrics into all future efforts
  - Develop a common data set
  - Provide an online Assessment Toolkit
  - Develop materials that help members communicate value
  - Update the NWCCU accreditation standards statement on the Alliance web site
  - Continue to work with Alliance members to provide guidance and support for assessment activities
- This team will pursue activities identified by the previous assessment task force