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## Finding Joy in Our Profession: John F. Helmer on Library Consortia

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## Finding Joy in Our Profession: John F. Helmer on Library Consortia

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### Abstract

John F. Helmer, executive director of the Orbis Cascade Alliance, has had an amazing career. In this interview with Valerie Horton, Helmer shares his insights, humor, and deep understanding of our profession. John sees the best of library collaborations as “entrepreneurial, spirited, ambitious,” and leading to the development of critically important working relationships. John offers many nuggets of wisdom for collaborative leaders in this interview. His insights into failure should be required reading in our profession. He argues that if you aren’t failing, you aren’t trying hard enough.

Keywords: Library Consortia; Orbis Cascade Alliance

### Introduction

John F. Helmer has been actively involved in library consortia for more than 20 years and currently serves as Executive Director of the Orbis Cascade Alliance, a nonprofit organization serving 37 colleges and universities in the northwest U.S. John is the 2012 winner of the American Library Association's Hugh C. Atkinson Memorial Award, which recognizes Helmer for risk-taking and as an effective leader and champion of new ideas and initiatives. John's early career includes bookselling, special collections cataloging, authority control, and systems administration positions in academic libraries. His education includes an undergraduate degree in mathematical economics, graduate work in econometrics, and an MLS from UCLA. John enjoys small fast sailboats and camping in the arid places of the western US. He and his wife, Normandy, live in a small farmhouse in Eugene, Oregon with chickens and a Kiger Mustang (that’s a horse, not a car).

The Orbis Cascade Alliance has pushed the envelope under his leadership, and there is much a

consortium leader can learn from his experiences. His thoughts on creating a shared workforce are evolutionary, perhaps even transformational. He also discusses the role of deep collaboration in redesigning library jobs, and he talks about how next generation catalogs can serve as a major focal point for consortia in future. John sees collaborative work not as ‘added duties’ but as the ‘core’ job of the library professional.

Valerie Horton has followed John’s work for many years now. She hope he continues to be a contributor for our profession, otherwise we are going to miss one of our most profound and joyous voices the profession has ever been lucky enough to have.



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John F. Helmer

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**CL:** Tell us about your career and about Orbis Cascade Alliance.

**JH:** I came to librarianship after dropping out of a Princeton doctoral program in econometrics, unskilled demolition work, collecting personal loans from Marines, and selling books. You know, the stereotypical librarian background.

I went to the University of California, Los Angeles (UCLA) library school thinking I might be a reference librarian in a public library but my whole orientation was changed by studying with my advisor, Elaine Svenonius, who instilled in me a love of the philosophical and theoretical view of cataloging. Also influential on me were several librarians at the University of California, San Diego (UCSD) where I stumbled into a job working in cataloging and special collections. Chief among the latter was Jackie Dooley, now with OCLC, who has an infectious energy, sense of humor, and intelligence that just makes you want to take on challenges. The influence of Jackie, Elaine and a few others at UCLA and UCSD sent me rocketing off in another direction. I loved cataloging weird stuff

like artist's books and concrete poetry broadsides and was fascinated by cataloging things that included no text at all.

Long story short, after graduation I got a job as an entry-level cataloger at the University of Oregon (UO). In that era, the UO had lots of new librarians and there were many opportunities to try new things. I quickly moved toward supervising copy cataloging, processing and preservation, special collections cataloging, and finished that part of my career as principal cataloger and head of authority control. I have always had fun with my work and, as part of a report on authority control, I included a demonstration of "Staffordshire bull terriers as a narrower term for Civilization." I later wrote a somewhat critical review of the *Art and Architecture Thesaurus*, so was once introduced as "an AAT-basher and guru of authority control in Oregon." A proud moment.

Alas, I left the fun of cataloging too soon and took a job as head of library systems at UO. We did lots of interesting things and one of those was to write a grant for a union catalog of five libraries, modeled after the new system just then being implemented by OhioLINK. We got the grant and I helped implement the system, hire the first staff, and found the Orbis consortium. Basically, I got gradually sucked into serving as a de facto Executive Director. Inspired by the Museum of Jurassic Technology, I wrote an editorial called *Inhaling the Spore*, in which I compared myself to the Cameroonian stink ant in the way I became infected by a consortial spore that took control of my brain. A seminal moment came in 1997, when I attended the first International Coalition of Library Consortia (ICOLC), née Consortium of Consortia, a name I have always liked better, and figured out that, like me, nobody really knew what a consortium was supposed to do and we were all making it up on-the-fly.



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That first ICOLC meeting was very intense; the progenitor of the infamous ICOLC “vendor grille” in which vendors are questioned intensely by demanding and knowledgeable consortium leaders. ICOLC became the most important professional organization in my career and I was lucky to steal ideas from luminaries such as Alan Charnes, Kathy Perry, Tom Sanville, and Lizanne Payne. Eventually Orbis created a real leadership job. I applied and became the Executive Director in 2000. At the time my boss warned me that it was a “dead-end job.” True, I guess, since I stayed so long!

Orbis grew from 5 to 21 members, added many services and activities, and eventually merged with Cascade, our close-sister consortium in Washington State. The resulting consortium, the Orbis Cascade Alliance, was an immediate hit and quickly expanded to include 37 members. We had the right scale and a wonderful membership to do great things. I have always thought in terms of a “Goldilocks” or “habitable” zone where things are not too extreme either way: a sweet spot that is “just right.” For me the Orbis Cascade Alliance has been just that: not too big or too small, just the right set of members with a shared vision, and, gradually, a sense of ambition, confidence, and willingness to rely deeply on each other. The Orbis Cascade Alliance is the love of my work life.

**CL:** Could you elaborate on what you see as the top three or four key values of library collaboration?

**JH:** In a sense, no. Consortia are very different and they are valid or successful for different reasons. Some seem largely to function as a mechanism to attract state funding and that is valid as libraries need strong funding! Others do much more programmatically. At its best, the Alliance (my favorite, of course) is entrepreneurial, spirited, ambitious, and it runs on very close working relationships. For that kind of consortium I’ll list five values:

- Ambition
- Creativity
- Trust
- Competence
- Fun

**CL:** What have been some of your most satisfying and rewarding involvements in library collaboration?

**JH:** It is odd to admit but some of the worst times have also been the best: failure of a grant; financial meltdown of a key partner; major technical problems; hostile relationship with a very powerful vendor. All were scary and some were existential threats, but we never let a good emergency go to waste. In an emergency the Alliance shines. There is a clarity, nimbleness, focus, and lack of complacency that is awesome to behold. We ended up stronger after every one, and with the kind of personal relationships that are only formed under fire.

**CL:** How about learning from the past? What collaborative initiatives didn’t work well and what can we glean from their failure?

**JH:** This is an important question since there is always much to learn from failure. In small sailboat racing they say if you never capsizes then you are not trying hard enough. If you never fail then you are playing it too safe.

Our failures have come from those occasions when we have not really been clear about our goals. I think of our attempt to create an institutional repository. We did good work but our notions of what an IR should accomplish shifted too often, and our lack of clarity about what a “consortial IR” even means, may have doomed the effort. We also suffered from a disconnect between highly technical staff and administrators. The overlap in expertise and language was small and communication often broke down. Technical staff had a hard time explaining in plain language why what they wanted to do was important and administrators had difficulty



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asking questions and eliciting answers that would help them feel comfortable approving a large and risky project. If I had a better personal understanding of IR's and the associated issues, I might have been a better bridge between those two groups.

Among failures, I also think of a long and hard effort to create a shared high-density storage facility we called the Regional Library Services Center. Here we came extremely close to success but at a key juncture we decided to hitch our star to an Oregon state bonding process that took time and never panned out. We probably could have found private funding and moved forward from the beginning but by the time state funding failed, everyone was burned and exhausted and the initiative was dropped. The Northwest still needs a shared storage facility, and libraries will manage space and collections less efficiently on account of our failure to pull that one off. The central expense of such a facility is large but what we see instead is a more insidious bleeding from a thousand cuts, if you will.

**CL:** Libraries have a long and impressive history of working together such as with interlibrary loan. What other types of partnerships and networking do you see as important to growing, thriving libraries?

**JH:** Libraries are wonderful things regardless of whether consortia exist or not. Consortia are not an end in themselves but rather one of many tools libraries should use to advance and thrive. A great consortium should be one arrow in each library's quiver. To that end, I think consortia need to stay on top of what is new but not always expect new money. We have to get good at helping members reexamine legacy operations. Libraries are part of a competitive environment and we just can't assume people will see us as good, justified, and worth funding unless we are changing and advancing while staying true to core values. In short, in addition to

exploring new services, consortia should be finding ways to save members money, and do things better even in familiar areas where there may be entrenched interests.

I think that deep collaboration based on shared human resources is a very exciting area. People are so important, so expensive, and many are trying to do too many things and not feeling good enough at any of them. The strong network tools we have now make a truly effective distributed workforce not only possible but, in some cases, the best way to go. Creating a shared labor force has the promise of making jobs better and improving services but it requires careful thought and trust that encourages a willingness to depend on others. Library A has to be willing to say "I depend on Library B to accomplish my mission." I see it as a long-term commitment, not a convenient arrangement you can easily get out of. Marriage, not just a hookup.

I also think consortia need to continue looking for ways to consolidate services or even merge organizations. The impetus for such action can come from staff or leadership but ultimately members need to insist that every consortium be justifiable as a separate organization.

**CL:** What do you believe are some of the greatest current challenges to library collaboration?

**JH:** The most important thing is the health of our member institutions. They need to be strong and well-funded in order to be good collaborators. The challenges I see include:

- Inflation in the cost of higher education and the presence of competitors
- Rigidity of budgets that prevent shifting funds
- The need for strong leadership with the mandate, latitude, and tools to act
- Complacency, burnout, lack of focus, trying to be everything to everyone



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- Hesitancy to take a risk, start new things, and shut down outdated or poor-performing projects
- Temptation to see collaboration as an extra duty or volunteer activity when it should be viewed as a core part of everyone's work

**CL:** Looking toward 2020, what new challenges for libraries do you see on the horizon? How might libraries partner to meet these challenges?

**JH:** Consortia are increasingly playing a major role in members' exploration of next generation library management and discovery systems. We are in an era that is, perhaps, similar to when libraries were first adopting online catalogs. This is a once-in-a-generation opportunity to set off in a new direction. More than this, I think it important that we implement not just new, but shared systems, and rethink how work is done in such an environment. I particularly like the Alliance's strategic agendas, with concepts like "one collection" and "do things once, do things the same, do things together." Such taglines are simplistic, of course, but they are also aspirational and point to a direction if not an end point. To paraphrase my colleague Jay Starratt at Washington State University, there is simply power in using the same tools and working on the same end products. Another colleague has likened implementation of the Alliance's shared ILS to building the foundation of a house. It is a great start but we will be working for years to build additional floors and explore the potential of this new foundation.

As previously mentioned, I also think that there is much more we can do to share human resources. Consortia have always made ad hoc decisions about how to deploy human resources but I think there might be a real payoff in developing a more rigorous set of principles for decision making. If I can plug our own work, I suggest the Alliance's [Collaborative Workforce report](file:///C:/Users/vhorton/Downloads/finance_cwf_final_2015_August%20(3).pdf) [file:///C:/Users/vhorton/Downloads/finance\_cwf\_final\_2015\_August%20(3).pdf]. It is

not the answer, but it does represent our striving in a direction.

I also think special collections and archives are increasingly important repositories of content we can uniquely provide. Ideally this work should include small historical societies and archives but the economics of serving this community are difficult at best.

Maybe this ship has sailed but I am often struck by the speed with which we have traded ownership and sharing for licensed annual access. Seems a bit like we used to own our homes and invite friends to stay over and now can only rent an apartment. This is a simplistic way to represent what amounts to a vast expansion in what is available, but it seems short-sighted to accept a system of huge annual expenses with no ownership at the end of the day. We still have opportunities to own, produce, and share content and I'd love to see libraries move back in that direction.

Finally, I think we need to see our vendor partners as important collaborators and worthy of our time and attention. We need to reward our good partners and get tougher about using our purchasing power to move away from those vendors that are not in synch with the values and needs of libraries and the people they serve. Let's walk away from bad deals, not just complain.

**CL:** What are your plans for the future? Anything related to library or consortia?

**JH:** I have no plans and am just enjoying that question mark in my future. I am enthralled by the unknown and will be working hard to avoid any commitments for a bit. I have a huge number of interests and already have more ideas than I can do. Most are silly, but then those are also the frontrunners! I will continue working with several nonprofits not related to libraries, and have most recently enjoyed serving as a



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Court Appointed Special Advocate, or CASA, for two abused and neglected children currently in foster care. I am “retiring” at 58 but am energetic and my health is good, so who knows, maybe I have another career or two left in me. Building rock walls? Competitive sailing? Eccentric folk artist? Greeter at Walmart? Only time will tell.

Biography: John F. Helmer has been actively involved in library consortia for more than 20 years and currently serves as Executive Director of the Orbis Cascade Alliance, a nonprofit organization serving 37 colleges and universities in the northwest U.S. John is the 2012 winner of the American Library Association's Hugh C. Atkinson Memorial Award, which recognizes Helmer for risk-taking and as an effective leader and champion of new ideas and initiatives. John's early career includes bookselling, special collections cataloging, authority control, and systems administration positions in academic libraries. His education includes an undergraduate degree in mathematical economics, graduate work in econometrics, and an MLS from UCLA. John enjoys small fast sailboats and camping in the arid places of the western US. He and his wife, Normandy, live in a small farmhouse in Eugene, Oregon with chickens and a Kiger Mustang (that's a horse, not a car).

