



# Alliance Advocacy Framework

The Orbis Cascade Alliance’s vision is to be a “vital partner in advancing transformative learning and research and creating equity in higher education.” To realize this vision, the Alliance’s mission calls for us to push the “boundaries of what is possible in libraries through strategic collaboration.” Both pushing boundaries and advancing transformation in higher education requires changing systems and structures within libraries, higher education institutions, and the broader academic and scholarly communication systems. We believe that a critical component of creating change is advocacy: using our collective voice to influence individuals, institutions, and systems.

## Forms of Advocacy

The Orbis Cascade Alliance Board of Directors and Executive Director lead Alliance engagement in external advocacy efforts on behalf of members in order to elevate, advance, or heighten visibility for positions, objectives, or values that align with the Alliance’s vision, mission, and current strategic priorities.

Alliance advocacy efforts most often take the form of [public statements](#)—either initiated by the Alliance, or joined by the Alliance as part of broader collective action with other consortia, libraries, or higher education organizations. However, as circumstances require, the Board may determine that other forms of advocacy are most likely to contribute to desired change. This may include, but is not limited to: responding to public calls for comment; commissioning research and policy papers; developing an amicus brief; committing funding or personnel; providing education or testimony related to proposed legislation or policies.

## Focus and Scope of Advocacy

The Alliance balances the time and resources committed to advocacy efforts with our operational and strategic work dedicated to advancing member institutions. With consideration for these resource limitations, the Board has defined the following parameters for Alliance advocacy activities.

## Core Communities

As a regional consortium, the Alliance's advocacy efforts are predominantly focused on issues of relevance and potential impact to libraries, higher education, and cultural heritage in the Pacific Northwest. This focus acknowledges the interconnectedness within the region of academic, school, public, and special libraries and archives, as well as students, teachers, and library/archives workers. When national issues impact these regional communities, the Alliance's efforts may extend more broadly.

## Core Issues

Within its communities of focus, the Alliance emphasizes engagement with issues for which it will be recognized as a stakeholder and informed voice. This includes equitable access to information resources, including the accessibility of such resources; content and platform licensing terms that reflect Alliance values; the affordability of education for students; the role of libraries in education; and the value of libraries and cultural heritage organizations, including their workers.

## Considerations for Engagement

When considering whether to engage in advocacy activities around a specific issue, the Board and Executive Director will consider the following:

- Is the issue of substantial importance to Alliance members or other relevant communities?
- Would advocacy efforts around this issue align with the Alliance's vision, mission, values, or strategic priorities?
- Would the Alliance as an organization, or our members as a collective, be considered key constituents in this issue—is the outcome of significance to the Alliance and its members?
- Would engagement with this issue lead to a desired relationship, or strengthened relationship, between the Alliance and other groups?
- Is the Alliance uniquely positioned to have a meaningful positive impact on the issue and/or will engagement have a positive impact on the Alliance (this could include enhanced Alliance visibility, reputation, or standing)?
- Does the Alliance have the resources available to commit that would be needed to have a meaningful positive impact?
- Are there state-specific factors that may impact the Alliance's potential advocacy activities, and/or create variable benefits/risks for Alliance members in different states?
- Does Alliance advocacy around this issue introduce any risks (financial, legal, reputational) for the Alliance or member institutions? Are these risks greater than any risks posed by not engaging?

- In making this determination, the Board should consult with Council members as to potential risks or negative impacts.

After consideration of these questions, the Alliance will move forward with an advocacy action if the Board (by a simple majority vote) deems an issue to be of significant importance; aligned with Alliance mission and priorities; with a reasonable probability that Alliance engagement will have a meaningful impact; and with an acceptable level of risk of engagement.

In making a determination of *acceptable level of risk*, the Board will seek to do no harm (legal or financial) to member institutions and the Alliance—including, but not limited to, avoiding activities that would jeopardize Alliance or member non-profit status; place members out of compliance with state laws/regulations; expose the Alliance or members to legal action; limit Alliance or members' eligibility for funding necessary for operations; or otherwise significantly jeopardize Alliance or member funding or legal compliance. *As part of this risk assessment, the Board will weigh possible risks created both through action and inaction.*

***Exception to Public Engagement.*** Even if there would likely be a positive assessment by the Board of a potential advocacy action, the Alliance will not engage in *public* advocacy on behalf of member libraries related to an internal conflict with their parent institutions who are the legal members of the Alliance. Alliance Council members with concerns about institutional actions focused on (or otherwise impacting) the library may request support for internal, direct advocacy from the Board Chair and Executive Director.

## Advocacy Processes and Procedures

- [Process for Responding to Advocacy Opportunities](#)
- [Process for Setting Annual Advocacy Priorities](#)
- [Advocacy Action Planning](#)

## Advocacy by Alliance Employees

Alliance employees can engage in external advocacy efforts, including making public statements, on behalf of themselves at any time and in any forum of their choosing. This includes reaching out to legislators to share concerns or advocate for policy or budget issues. For the avoidance of doubt or confusion, employees are encouraged to clearly delineate to external parties when they are making contact based on their own perspective, expertise or background, rather than speaking on behalf of the Alliance as an organization and/or any of its member institutions.

In the course of personal advocacy activities, Alliance employees continue to be governed by Alliance policies, including (but not limited to) policies related to Alliance-owned intellectual property and Alliance or member institution confidential information. Employees may not disclose Alliance intellectual property or confidential information as part of their advocacy efforts.

If Alliance employees are contacted with a request to speak on behalf of the Alliance, or otherwise publicly articulate a position on an issue for the Alliance and/or member institutions, these requests should be referred to the Executive Director. As needed, the Executive Director may consult with the Board Chair in determining an appropriate response or comment. Requests for Alliance support of an advocacy issue will follow the processes outlined in this framework.

## Acknowledgements

The Orbis Cascade Alliance Advocacy Framework incorporate ideas and language from the following:

- Herold, I. M. H. (2021). *Leading together: Academic library consortia and advocacy*. Chicago: Association of College and Research Libraries.
- University of Oregon Libraries. (January 3, 2023). “Policy for organizational statements and other types of public response to external events.”

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