

HIGHER EDUCATION LIBRARIES IN PARTNERSHIP (HELP) PROJECT



PART 2: COLLABORATION REVIEW

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**WALES HIGHER EDUCATION LIBRARIES FORUM
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1. Introduction

1.1 Summary and objectives

The objective of this Collaboration Review is to build up a comprehensive picture of existing and potential collaborative activity within the Higher Education (HE) Library and Information Services (LIS) Sector and between the sector and other sectors and domains in Wales. This report outlines the nature of co-operative links between libraries, differentiating between the different levels of collaboration as defined in the Research Support Libraries Programme (RSLP) commissioned report *Barriers to resource sharing among higher education libraries*¹. The Review also builds on the recommendations for closer collaboration between Higher Education Institutions (HEIs) in Wales as outlined in the National Assembly for Wales document *Reaching Higher*², along with the emphasis on an holistic approach to research information infrastructure in the recent Research Support Libraries Group (RSLG) report³. It evaluates current collaboration using these methodologies and highlights key areas for enhanced collaboration, to the benefit of the entire sector in Wales.

Details of collaborative activities and proposed initiatives have been collected through focus group meetings held during the first two months of the Project with Heads of Library & Information Services in every HEI in Wales and with the Librarian of the National Library of Wales. The remit of these meetings was extended within the first year of the project to include interviews with representatives from other library sectors in Wales. The first aim of the discussions was to identify the practical levels of collaboration and co-operation taking place in each institution and region, determining why these initiatives were set up, how they have progressed. Key to this first aim was to note what barriers or challenges, if any, were encountered when setting up or developing collaborative activities and to determine the benefits of any level of collaborative and cooperative work. The second aim was to determine areas of LIS service provision and staff development which could be approached collaboratively in Wales, where benefits could be gained from increased collaborative and co-operative activity both from user and institutional perspectives.

2. Collaboration: definitions, drivers & challenges

2.1 Definitions

The following definitions on collaboration, taken from the *Barriers to resource sharing among higher education libraries* report⁴ are used in the Collaboration Review.

¹ Higher Education Consultancy Group / CHEMS Consulting. (2002). *Report to the RSLP on: Barriers to Resource Sharing Among Higher Education Libraries*.

² National Assembly for Wales. (2002). *Reaching Higher: Higher Education and the Learning Country: A strategy for the higher education sector in Wales, March 2002*.

³ Research Support Libraries Group (2003). *Research Support Libraries Group Final Report*.

⁴ Higher Education Consultancy Group / CHEMS Consulting. (2002). *Report to the RSLP on: Barriers to Resource Sharing Among Higher Education Libraries*.

Coordination: "... a general process involving communication and consultation. All forms of joint working must involve coordination to some extent."

Cooperation: "... a basic level of working together, in that without cooperation nothing else can be achieved. However, in practice cooperation is weaker than collaboration, and this distinction is a frequent cause of confusion in so-called collaborative projects which are often not collaborative at all."

Collaboration: "... joint working which involves a conscious and shared approach to planning, implementing and reviewing aspects of LIS services, but not necessarily the commitment of any significant resources."

Partnership: "... a more formal and explicit approach to collaboration, often involving key roles and responsibilities being determined at the outset. Contractual agreements exist at one end of a spectrum of partnership approaches."

Resource sharing: "... forms of working with other libraries that, by definition, involves the sharing of resources, whether finance, staffing, services, accommodation and infrastructural support, or collections. However, this type of resource sharing as currently practiced seldom involves any significant element of risk, either financial or to existing service provision."

Deep Resource Sharing: "... collaboration between or among libraries in which institutional autonomy in service provision is in some degree surrendered, and which involves some degree of risk (for example through the use of contracts, service level agreements, etc.)"

Additionally, the following two concepts have been interpreted by the project as:

Cross-sectoral: meaning libraries beyond the Higher Education sector to include Further Education and schools.

Cross-domain: meaning those organisations such as museums, galleries and archives.

2.2 Drivers for collaboration in Wales LIS

The following drivers for collaboration were identified during the project's focus meeting discussions in February/March 2003:

- Improving user access.
- Sharing expertise and identifying good practice.
- Reduce duplication of effort.
- Political will.

- National Assembly for Wales' Strategic Plan for the HE sector⁵
 - Reconfiguration and collaboration.
 - Strengthening research through joint action.
 - Excellence in teaching and learning.
 - Widening access.
 - Efficiency gains.
 - Supporting Lifelong Learning.
- HEFCW
 - Structural change.
 - Collaboration.
 - Efficiency gains.
 - UK research collections strategy.
- Professional contacts.
- Fewer barriers between LIS sectors and organisations.
- Consortial funding bids.
- Strategic agenda.
- Cooperative and collaborative environment nationally and internationally
 - Research Support Libraries' Group *Report* March 2003⁶.
 - RSLP Collaborative projects.
 - RSLP Report on *Barriers to resource sharing among higher education libraries*⁷
 - LISC (Wales) report on resource discovery⁸.
 - ELWa Corporate Plan⁹.
 - CILIP's Lifelong Learning Strategy¹⁰.
 - Full Report of the WILIP Consultation Exercise¹¹

2.3 Challenges to collaboration in Wales LIS

The focus groups identified the following challenges facing library collaboration in Wales:

- Time needed to support and drive forward cooperation and collaboration.
- Staff resource required to coordinate and develop cooperative and collaborative initiatives.
- Geography of Wales.

⁵ National Assembly for Wales. (2002). *Reaching Higher: Higher Education and the Learning Country: A strategy for the higher education sector in Wales, March 2002.*

⁶ Research Support Libraries Group (2003). *Research Support Libraries Group Final Report.*

⁷ Higher Education Consultancy Group / CHEMS Consulting. (2002). Report to the RSLP on: Barriers to Resource Sharing Among Higher Education Libraries.

⁸ Roberts, H. E. (2002). Towards a complete picture of library resources in Wales: A report of a study of Resource Discovery in Wales for the Library and Information Services Council (Wales). pp.1-54.

⁹ ELWa. (2003). *Corporate Plan 200-2006.* National Council for Education and Training for Wales

¹⁰ Library Association. (2001). *Libraries and lifelong learning: a strategy 2002-4.*

¹¹ Re:source. (2003). *Full Report of the WILIP Consultation Exercise*

- Diverse types of institutions with different demands, user-base, research/teaching focus.
- Lack of momentum in pushing forward initiatives.
- Collaboration can depend on personalities.
- Competition between institutions.
- Different institution types involved in partnerships with HE (i.e. National Health Service (NHS)).
- Lack of awareness of strategies/collaborative initiatives among all staff within an institution.
- Failure to identify benefits of collaboration and communicate to all (library, academic, users).
- Institutional strategies and policies, e.g. lack of academic rationalisation.
- Income streams are to individual institutions.
- Balance between formal and informal collaboration needs to be managed.
- Collaboration vs income generating initiatives by libraries.
- A need for larger issues, such as licensing and authentication, to be addressed and at national level before initiatives in these areas can be advanced.

3. Overview of existing collaboration in Wales

3.1 Organisations

A number of organisations are actively involved in developing and supporting collaboration and cooperation in the LIS sector in Wales. Of these, the key organisation for HE libraries and the National Library of Wales is:

- WHELP (Wales Higher Education Libraries Forum): Chief Librarians, Directors and Heads of Library and Information Services of HEIs and Librarian of the National Library of Wales. Regular meetings to exchange information, share knowledge. Launched reciprocal access schemes; WALIA & CROESO. Bid for and managed Research Support Libraries Programme (RSLP) Projects. Develops and supports cooperative and collaborative initiatives and services in LIS sector in Wales.

Other organisations which provide a collaborative infrastructure include:

- HEWIT (Higher Education Wales Information Technology Forum): Heads of IT & Computing.
- WHELP Deputies / Senior Managers Group.
- WHISD (Welsh Higher Education Institutions Staff Development) - WHELP/HEWIT Staff Training and Development Group.
- HEPCW (Higher Education Purchasing Consortium, Wales).

- Welsh Libraries Training Group.
- CIRC-Cymru (Circulation / OPAC issues).
- SWMAN (South Wales Metropolitan Area Network).
- Welsh JANET Regional Users Group.
- Audio-Visual Technicians Group.
- CLAUD Cymru.
- SCL (Society of Chief Libraries) Wales.
- Further Education libraries group co-ordinated by University of Glamorgan and UWCN.
- RSC (Regional Support Centre) Wales – JISC (The Joint Information Systems Committee).
- CILIP (Chartered Institute of Library and Information Professionals) Wales.
- LISC (Library and Information Services Council) Wales.
- CWLIS (Consortium of Welsh Library & Information Services).
- UC&R (University College and Research Group) Wales.
- CoFHE (Colleges of Further & Higher Education Group) Wales.
- ELWa - National Council for Education and Training for Wales.
- Archives Council Wales.
- Council of Museums in Wales.
- CyMAL – Museums Archives and Libraries Wales.

3.2 Cooperative/collaborative projects & initiatives

- Access to Learning bid to ELWa.
- Wales on the Web / Cymru ar y We – NLW.
- Gathering the Jewels (New Opportunities Fund (NOF)).
- Wales 1801-1919 Project (RSLP).
- Mine of Information (RSLP).
- Collections Wales (RSLP).
- Culturenet Cymru (all-Wales, bilingual, cultural ICT network).
- Archive Network Wales Project (Heritage Lottery Fund / NLW).
- List of Indexes to Welsh Periodicals and Newspapers (William Howells 1999).
- Bibliography of Wales.

3.3 Cooperative/collaborative services

- CROESO (Wales-wide scheme – reciprocal access to any full-time student on an HE course in Wales to all Welsh HEI libraries).
- WALIA (Wales-wide scheme - access and reciprocal borrowing for academic staff and research postgraduates in Welsh HEI libraries).

- Annual Colloquium for HE library and ICT staff Wales-wide.
- WHELFL Development Fund.

3.4 Regional Groups

- ATLIS – Access to Libraries in Swansea.
- GALW – Gateway to Libraries in Wrexham.
- Linc-y-Gogledd – Bangor & region access and borrowing scheme.
- NEWLIS – Newport Libraries and Information Services.

3.5 LISC (Wales) report on Resource Discovery

Since the Project started at the beginning of 2003, Hywel Roberts' report for LISC (Wales) on Resource Discovery¹² was published. The findings and recommendations of this report have tied in to many of the key themes identified by the HELP project in interviews and group meetings with all LIS sectors. Findings of the Resource Discovery report were taken from a survey of 100% of LIS in Wales (HE, FE & public libraries) examining to what extent can existing or planned IT be used to discover and make available library resources.

Main findings:

- Enthusiasm for resource-sharing, including exploitation of resources in NLW. The report noted a new ethos in public libraries, based on the demands of life-long learning agenda, the successful roll-out of the Peoples Network and a greater willingness to work together.
- Success in regional and cross-sectoral schemes in Wales (e.g. ATLIS, NEWLIS etc).
- Improved resource discovery and accessibility provided by ICT. All library services in Wales need to move to providing web-accessible catalogues (several public library services are still implementing these). Once this is done, then it may be possible to integrate all online catalogues providing Wales-wide access to over 11 million items. The situation is ripe for progress. Wales has built up technology and skills, we are a small country and we know each other, there are therefore fewer boundaries.
- Resource-sharing is a political agenda.

Challenges to resource sharing

- Residual territorialism
- Structural inequalities i.e. FE colleges under-resourced and areas in rural Wales still unconnected

¹² Roberts, H. E. (2002). *Towards a complete picture of library resources in Wales: A report of a study of Resource Discovery in Wales for the Library and Information Services Council (Wales)*. pp.1-54.

- Dangers of comparisons – not wanting to make their library catalogue available as “not finished” and not as good as other libraries’

What should emerge from the report

- Creating general awareness of resource-sharing framework
- Need to use existing technology
- Making representations of inequality: i.e. to FE principals
- Assessing the work necessary to create a National Union Catalogue
- Need coordinating programme to sustain and initiatives
- Emphasis on creating local links first and then national
- Creating collaborative arrangements
- Need to work cross-domain: with Archives Network Wales and Museum sector

Strategic

- Central core of support / ideas
- Advocacy – for LIS advice
- Bank of necessary support skills

4. LIS collaboration in Wales: Current and future activity

Given the breadth of current collaborative activity in Wales and the potential for expanding this, a standard format has been used for the primary areas identified by the Review and the focus groups.

Collection Management

4.1 Improved resource discovery

4.1.1. Existing activity:

- RSLP Projects – Collections Wales, Wales 1801-1919; Mine of Information.
- Wales on the Web.
- Gathering the Jewels.
- Culturenet Cymru.
- Regional library cooperative groups (ATLIS, GALW, Linc-y-Gogledd, NEWLIS).
- SCURL resource discovery projects in Scotland provide valuable models.
- HELP Project’s Journals Case Study.

4.1.2. Potential initiatives:

- Wales-wide national union catalogue.

- Serials catalogue Wales-wide: HE and cross-sectoral libraries (in conjunction with electronic document delivery scheme).
- Identify and promote use of Welsh-language and local materials cross-sectorally (online catalogue).
- Collections Wales: expand collection descriptions and extend to all HE and public library collections.
- Increased digitisation of resources. With the digitisation programme currently underway at NLW, is there scope to work with WHELP to identify a list of digitisation priorities according to HE/research demands?
- Digitisation: value in a Welsh text archive linked to key items from the Wales 1801-1919 RSLP project.
- Scope for using Collections Wales database as a starting point for a collection strengths initiative.
- Increased cross-sectoral resource discovery: improving access to resources throughout Wales. Key to this is the need for Welsh public library catalogues to be made available online.

4.1.3. *Benefits:*

- Knowledge of and access to greater number of resources for HE researchers.
- Of permanent, long-term value.
- Contributes to Lifelong Learning and Learning Country agendas.
- Better resource discovery and access to Wales' resources by all.
- Promote lesser-known and lesser-used materials.

4.1.4. *Challenges:*

- Cross-sectoral collaboration and funding issues.
- Cost of setting up and maintaining resource discovery tools.
- Wales-wide rather than UK-wide (for library catalogue integration and serials catalogue).
- Problems of integrating all resource discovery tools through the most efficient and user-friendly method.
- Need to balance research needs and needs of the public.

4.1.5. *Drivers:*

- RSLG Report.
- Learning Country agenda and lifelong learning issues.
- Widening participation agenda.
- Collaborative action by promoting resources and access.

4.1.6. *Resource Required / Achievability*

- All Welsh HEI library catalogues and the NLW book catalogue are Z39.50 compliant so limited technology needed to achieve union catalogue. Greater challenges and resource implications in extending coverage to other sectors.

4.1.7. *Notes:*

- Could build on the useful RSLG emphasis on the importance of adequate, cross-sectoral discovery tools in a practical and distinctive way for Wales.
- Recommendation that WHELP highlights Hywel Roberts' report on resource discovery¹³ for CyMAL's agenda.

4.2. Collaborative Purchasing

4.2.1. *Existing activity:*

- HEPCW (Higher Education Purchasing Consortium for Wales)
- Collaborative purchase of Voyager library management system by five of HE libraries in Wales in 1999 (UWA, Cardiff, UWS, UWL and WCMD).
- Some regional collaboration.
- Collaborative purchase of EEBO (Early English Books Online) by NLW & Cardiff.
- Collaborative arrangement by public libraries in Wales to purchase Oxford Reference Online.
- UK -wide initiatives, e.g. JISC, CHEST.

4.2.2. *Potential initiatives:*

- Use of "University of Wales" as licence holders (Wales-wide licenses) to allow all to get resources via any HE library. Use grouping as model for collaboration, based on OHIOlink model¹⁴. Recommendation to JISC/Funding Councils /CyMAL of need to top-slice for core-collection.

4.2.3. *Benefits:*

- More power to negotiate better deals.
- Efficiency gains on joint purchasing.
- A by-product may be the establishment of a core electronic collection for Wales.
- Potential for access to increased number of resources.

4.2.4. *Challenges:*

- Time and effort involved with negotiating and managing consortial deals.

¹³ Roberts, H. E. (2002). Towards a complete picture of library resources in Wales: A report of a study of Resource Discovery in Wales for the Library and Information Services Council (Wales). pp.1-54.

¹⁴ Ohio Library and Information Network website <http://www.ohiolink.edu/>

- Institutional agendas not convinced of merits of consortial arrangements. Restricts library's ability to set own priorities.
- Problems of joint licenses and authentication on large scale for electronic resources.
- UK wide deals will offer better value for money: Wales may not be the best geographical unit for this type of collaboration.

4.2.5. *Drivers:*

- Rising LIS costs.
- Problems of joint licenses and authentication for electronic resources.

4.2.6. *Resource Required / Achievability*

- Resource implications in management of joint procurement and negotiating rights access and licensing issues.

4.2.7. *Notes:*

- CURL is reviewing issue of shared electronic resources purchasing and licenses in light of failure of NESLI.
- CHEST is reviewing electronic licenses and detailing access allowed.
- Compare time taken to arrange consortial purchase against real savings.
- Local initiatives in England, e.g. Sunderland.
- Ideas in RSLG report on core collections for all HE libraries.

4.3. Collaborative collection management

4.3.1. *Existing activity:*

- HELP Project's Journals Case Study.

4.3.2. *Potential initiatives:*

- Co-operative retention and disposal policies, possibly linked to collaborative storage.
- Co-operative preservation strategy.
- Serials catalogue to share research journal collections (with document supply service).
- All-Wales library catalogue, including cross-sectoral libraries.
- Establish common core collections, particularly of e-resources, in clusters of institutions on an all-Wales basis to support on- and off-campus e-learning.

4.3.3. *Benefits:*

- Cohesive and strategic approach to research information infrastructure across Wales.
- Better resource discovery.
- Highlight valuable specialised, local and Welsh-language materials.
- By identifying and preserving last copies collaboratively between libraries, encourages weeding and frees up space.
- Savings made on not duplicating resources.

4.3.4. *Challenges:*

- Institutional and departmental focus on research and collection development (see Glasgow and Strathclyde experience)¹⁵.
- Value of Wales-wide scheme rather than UK-wide.
- Could discourage smaller libraries from adequately stocking their collections.
- Some risk involved with making acquisition and weeding decisions based on other institutions' collections.
- Problem of sustainability if institutions academic programmes change.
- Time and effort of managing cross institution policies and procedures.

4.3.5. *Drivers:*

- Need for better resource discovery.
- Widening access to Wales' resources.
- Cost efficiencies.
- Need for a cohesive research information infrastructure for Welsh HE.
- RSLG agenda.
- Reaching Higher agenda.

4.3.6. *Resource Required/Achievability*

- Wales-wide online Serials Catalogue (using existing Z39.30 technologies or equivalent)
- Wales-wide online Union Catalogue (using existing Z39.30 technologies or equivalent)

4.3.7. *Notes*

- E-resources aspects to be explored further in HELP e-learning feasibility study.

¹⁵ Higher Education/British Library Task Force. (2001). *Study of collaborative storage of library resources : a report for The Higher Education/British Library Task Force.*

4.4. Deep-resource sharing

4.4.1. Existing activity:

- Joint appointments (for example, shared FOI and DPA posts between UWA, UWL and Trinity College Carmarthen).
- WHELF Development Fund.
- Linc-y-Gogledd.
- National Screen & Sound Archive Wales

4.4.2. Potential initiatives:

- Further joint appointments to areas of joint interest and use such as Compliance issues.
- Development of initiatives noted in Collaborative Collection Management (4.3): such as joint ownership of core print collections and e-resources.

4.4.3. Benefits:

- Treating all of the HE libraries within a city or region as a single resource (for example, shared borrowing and/or collection development creating a virtual academic library) will give a powerful boost to HE collaboration, as well as providing value for money.
- Less duplication of effort.
- Time and cost efficiencies in the long-term.
- Access to greater number of resources by users.

4.4.4. Challenges:

- Institutional and departmental needs tend to be dominant.
- See the Glasgow/Strathclyde pilot as test-case.
- Importance of institutional ownership of research resources by library staff and academics. Academics value access to local resources and ability to browse through print collections.
- Users unlikely to travel to print collections held in other locations.
- Collection size is seen as an indicator of library performance.
- Lack of clarity of real benefits to users for deep-resource sharing.
- No convincing case for greater and deeper resource sharing has been made to HEIs – librarians and Vice Chancellors.
- Risk in requirement to commit to long-term formal agreements.
- Time and effort involved with setting up complicated schemes.
- Many smaller technical, legal, local and operational barriers need first to be addressed before deep-resource sharing can take place. Unlikely that these

smaller barriers would be dealt with without commitment needed by each institution.

4.4.5. *Drivers:*

- Reaching Higher.
- RSLG Report.
- Rationalisation of stock and other cost efficiencies.
- Ability of technology to delivery electronic versions of resources to the user's desktop.

4.4.6. *Resource Required / Achievability*

- Initial investment in new library management systems for some libraries to achieve a virtual academic library.
- Resources issues caused major problems in the Glasgow/Strathclyde pilot.

4.4.7. *Notes:*

- Benefits of rationalisation of academic subjects and collections dependent on policy decisions on local mergers and rationalisation of academic coverage.
- Idea of sharing physical space: example of University of California, San Diego and their Public Library who have merged physically into one new building. Staff are employed by their existing institution, have joint line-managing, etc.
- HELP Project Feasibility Study on E-Learning to examine issues of shared access to e-learning resources.

4.5. Institutional e-prints archive

4.5.1. *Existing activity:*

- None identified.

4.5.2. *Potential initiatives:*

- Scope for regional collaboration on tools and shared strategy for institutional digital preservation (academic output – pre-prints, post-prints, conference papers, thesis etc) and/or open access repositories.
- Possibility of a unified approach and repository for all Welsh HEIs.

4.5.3. *Benefits:*

- More sense for this to be a single resource representing all Welsh HEIs, rather than individual institutions working on this separately.
- Collaboration of effort in a new and developing area.
- Could pilot in subject areas (eg Welsh language material?).

4.5.4. *Challenges:*

- Is Wales the correct size unit for this?
- House of Commons Science and Technology Committee Report suggests a model based on individual institutions¹⁶.

4.5.5. *Drivers:*

- Increasing trend towards open access model for academic publishing and institutional e-print archives.
- Science and Technology Committee Report on Scientific Publications.
- Reaching Higher.
- Boost to collaborative research in Welsh HEIs.
- Saves replication of activity and systems in separate Welsh HEIs.
- Increased activity internationally in this area – test-cases are underway.

4.5.6. *Resource Required /Achievability*

- There is open-source software available for building and maintaining OAI-compliant archives. Cost of archive negligible: server space and cost of technician¹⁷.

4.5.7. *Notes:*

- Open access archives or repositories by a group of institutions covering peer-reviewed research articles and their pre-prints: copyright retained by academic with permission granted for unrestricted reading, downloading, copying, sharing, storing, printing, searching, linking and crawling.
- Has direct relevance for the research aims of HEIs in Wales.
- Collaboration could be confined to shared systems and metadata.
- Major opportunity for collaboration with the NLW: e-prints repository to be based there.

4.6. Shared storage

4.6.1. *Existing activity:*

- None identified.

4.6.2. *Potential initiatives:*

¹⁶ House of Commons. Science and Technology Committee. *Scientific publications: free for all?* Vol 1: Report HC399-1 (London: HMSO, 2004).

¹⁷ DSpace Project at <https://www.dspace.cam.ac.uk/index.jsp>

- One physical store providing access to all stored materials with NLW holding last remaining copies in Wales.
- Regional (eg S. Wales) or local (eg Cardiff area) stores throughout Wales.
- Model of Australian library storage scheme (CAVAL): multiple locations and multiple owners. Ownership of each physical store resides with a particular university, items within belong to the national store.

4.6.3. *Benefits:*

- Enhance resource discovery and access to research materials within Wales.
- Immediate cost savings on rental of storage space.
- Major long-term capital savings on the provision of new library stores and buildings.
- Potential for cross-sectoral and cross-domain involvement (widening participation agenda).
- More efficient collection development (weeding, acquisitions) based on collaboratively managed store collection(s) including a single copy retention policy.
- Potential for including the NLW's extensive research collections.

4.6.4. *Drivers:*

- Cost of storage spent by each institution is huge throughout Wales and solution is needed.
- Duplication of materials reduced.
- Ensure that a last 'loanable' copy of monographs/journals is made available.

4.6.5. *Challenges:*

- Financial implications in infrastructure and staffing.
- Geography of Wales may make a single store impractical.
- Varying needs for storage for each institution and different criteria for each institution on nature of and access to stored material: may only be attractive to research-based institutions.
- Issues of ownership and access (electronic / physical loans) problematic.
- Need for van to collect and deliver Wales-wide.
- Need for union catalogue to identify and detail stored materials.
- Requirement to commit to long-term formal arrangements.
- Proximity of store in relation to service levels.
- Need to assess cost-benefits of alternatives like e-journals and inter-library loans.

4.6.6. *Resource Required / Achievability*

- Significant initial capital cost for the sector, but this will be lower than individual institutions making their own storage arrangements.

4.6.7. *Notes*

- Other examples of shared library storage include: CASS Project in Scotland - shared storage for HE libraries throughout Scotland, working with National Library of Scotland: pilot started in 2004.
- CARM repository of CAVAL in Australia – multiple locations and multiple owners. Ownership of each physical store resides with a particular university, items within belong to the national store.
- Harvard Depository, USA.
- New England Depository, USA.
- Any Wales-wide activity can benefit from feasibility studies and recommendations from these initiatives, particularly in view of our links with SCURL for the CASS project.

4.7. Access to NLW resources

4.7.1. *Potential activity:*

- Involvement of HEIs with NLW digitisation activities.
- Researchers may not always be aware of extent of collections in NLW. Need to investigate ways of making NLW collections more accessible to researchers (both within HE and more generally) and public.
- Issue of duplication in research journal availability and problems of storage (same journals being stored by all). Explore ways to use the NLW's collection of research journals. Investigate ways of safeguarding single-copy materials / rare items.
- NLW could take a lead in digitising rare and academically valuable texts to meet researchers' needs.

4.7.2. *Benefits:*

- Huge potential benefits for HE researchers.
- Contributes to the lifelong learning agenda.
- Meets NLW strategic objectives.
- Interesting links to collaboration on collection management, retention policies, collaborative storage and digitisation.

4.7.3. *Challenges:*

- Geography can be a barrier to physically accessing NLW.

- Cross-sectoral funding issues.
- Preservation problems.
- Legal deposit regulations limit access to resources, including e-resources.

4.7.4. *Drivers:*

- Social inclusion.
- Mission of the NLW to “to collect, preserve and give access to recorded knowledge, in all documentary forms, with an especial emphasis on the intellectual record of Wales, for the benefit of all engaged in research and learning, or with other information needs.”¹⁸
- RSLG recommendations on closer collaboration between national libraries and HE sector
- Learning Country agenda

4.7.5. Resource Required / Achievability

- Highlights need for cross-sectoral resourcing, which should be easier to achieve in Wales than in England.

Service provision

4.8. Collaborative inter-lending and document supply

4.8.1. *Existing activity:*

- Some regional arrangements.
- Linc-y-Gogledd (Bangor area reciprocal cross-sectoral borrowing and ILL scheme).
- Gateways to Learning initiative in South East Wales: EU finding recently confirmed. Aims to provide access to resources held in all public and academic libraries in the five former Gwent authorities.
- Previously initiatives have not been continued: SEREN (electronic document delivery) and Interlending Wales.

4.8.2. *Potential initiatives:*

- Suggestion that NLW take on document supply role – lend material from non-copyright stock?
- Based on Wales-wide serials catalogue, use rationalised collections of research journals for electronic document delivery.
- Electronic document delivery and interlibrary loan from any shared store solution.

¹⁸ National Library of Wales. (2002). *Annual Report: 2001-2002*. p.9.

- Need to examine issues cross-sectorally to exploit Wales's resources.
- Local cross-sectoral activity based around public and HE libraries rather than Wales-wide scheme.

4.8.3. *Benefits:*

- Value for money.
- Cohesive approach to research information infrastructure.
- Promoting local and Welsh-language resources.
- Cross-sectoral activity would increase widening participation and social inclusion.
- Potential to decrease costs of ILL.

4.8.4. *Challenges:*

- Cost of imposing another initiative expensive.
- Is Wales the right size unit for this?
- Conventional, postal inter-library loans diminishing rapidly.
- Not NLW's core business.
- Geographically, an all-Wales approach to interlending may not be ideal.

4.8.5. *Drivers:*

- Promote locally held resources.
- Potential efficiency gains by local solutions.
- Improvement in electronic document supply technology provides easier solutions to document supply initiatives.
- Inadequacy of current I.L.L. services and their cost.
- Makes better use of under-used resources in NLW.
- Widening access and social inclusion agendas.

4.8.6. *Resource Required /Achievability*

- Staffing, training and technology (scanners and software) required for electronic document delivery.
- Local inter-lending which currently exists in Wales relies on existing delivery services (i.e. University or local authority van).

4.9. Reciprocal access and borrowing schemes

4.9.1. *Existing activity:*

- WALIA (Wales Academic Libraries Inter-Access): access and borrowing rights for staff and research students in HE libraries in Wales.

- CROESO – access to HE libraries in Wales to students enrolled in HE courses in Wales.
- UKLibraries Plus – borrowing rights for part-time, distance and placement students from other member libraries and some access rights for full-time students and staff.
- SCONUL Research Extra (UK-wide borrowing and access scheme for academic staff and research p/g).
- SCONUL UK Computing Plus.
- Many local access and borrowing policies in place between institutions formally and informally (including inter-domains).
- Regional access schemes: NEWLIS, GALW, ATLAS.
- Regional access and borrowing scheme: Linc y Gogledd.
- Cardiff Information Services Partnership (CISP): partnership between Cardiff & UWCM in joint provision of: electronic mail, web and cache services, IT training courses, user documentation and information etc.

4.9.2. *Potential initiatives:*

- INSPIRE (Information Sharing Partners In Resources for Education): researching reciprocal access w/public libraries, FE & HE. Scope to develop in Wales as pilot?
- A virtual academic library with reciprocal access and borrowing for all HE libraries within a locality or region.
- Extending the WALIA/SCONUL Research Extra scheme to a wider group of customers within Welsh HE (eg taught course postgraduates).
- Schemes based on widening access and encouraging local participation in HE.
- Agreements on access within HEIs, NLW and cross-sectorally need to be detailed and made available / publicised. Make all aware of NLW collections and available resources.
- Establish guides to and encourage involvement in regional library access/borrowing schemes, e.g.: NEWLIS, GALW, ATLAS, Linc y Gogledd.
- Access and borrowing map of Wales' libraries online.
- A Wales-wide cross-sectoral access (and borrowing) scheme for all registered library users.

4.9.3. *Benefits:*

- Access to greater number of resources.
- Underpins the Learning Country concept.
- Time and costs with encouraging and managing schemes throughout Wales rather than large costs in opening up access.

- Creates an infrastructure to allow further cooperation and collaboration between HEIs in Wales.
- Potential resource sharing and saving.

4.9.4. *Challenges:*

- Physical barriers in place in libraries such as card-swipe schemes, entrance barriers and security deter access.
- Reciprocal access/borrowing: perception that influx of users from outside institution will flood library and make demands on resources. Not borne out by practice.
- Dominance of institutional/departmental imperatives.
- Different funding sources (HE, local authorities, WAG) make cross-sectoral collaboration more difficult.

4.9.5. *Drivers:*

- Widening access and social inclusion agendas.
- Increased access to resources for users.
- Access to cross-sectoral resources.
- Reaching Higher.
- RSLG Report.
- Empowering the Learning Community.

4.9.6. *Resource Required / Achievability*

- Local library partnerships like Linc y Gogledd have been established with minimal costs.

4.10. Other Collaborative Services

4.10.1. Virtual reference provision: shared reference and computing advisory service for Welsh HE. Potential to include computing advice? Wales-wide or between groups of institutions? Cross-sectoral role, to build on the Ask Cymru pilot scheme.

4.10.2. Collaborative approach to expand access to non-traditional students who have specific support needs. FE colleges and a number of HEIs have Education Drop-In Centres based in their libraries, linked to Centre for Lifelong Learning in each. Look at possible HEFCW funding for this from Students Support Services?

4.10.3. Shared service agreements (exists for Glamorgan's franchise colleges and for all NHS libraries – HELICON scheme & accreditation).

Training / Staff activities

4.11. Collaborative staff development and related issues

4.11.1. Existing activity:

- WHISD.
- Welsh Libraries Training Group.
- Regional group activities (i.e. Chartership).
- Shared training of franchise librarians.

4.11.2. Potential initiatives:

- There is duplication in training events in Wales with COFHE/UC&R/WHISD/CILIP – some rationalisation should be possible? Priority to identify training needs by all sectors and develop strategy based on real needs and consensus.
- Joint training in electronic information resources, by region or Wales-wide.
- Joint licensing scheme for City and Guilds and/or NVQ assessors Wales-wide.
- Sharing job-descriptions / grades (HERA – HE Role Analysis) – scope for Wales project.
- Shared Chartership programmes.
- Use each other for interviews and/or service reviewers.
- More shared subject support and/or library activity areas (i.e. ILL; Circulation).
- Use North and South Wales as basis for all training.
- Exchanges and visits.

4.11.3. Benefits:

- Less duplication of effort.
- Identifying and benefiting from good practice / expertise.
- Learning from experiences of all sectors: good opportunity for cross-sectoral co-operation.
- Improved and more cohesive service to customers.
- Resource and experience sharing.

4.11.4. Challenges:

- Geography of Wales.
- Smaller institutions with fewer staff find it difficult to attend external events.
- Staff reluctant to attend external training events.

4.11.5. Drivers:

- Importance of staff development/training on institutional agendas.

- New services and technologies appearing more frequently. Difficult to keep up with new initiatives.
- Cost and time of providing training in-house.
- One of the easier aspects of collaboration to accomplish.
- *Reaching Higher*.

4.11.6. *Resource Required /Achievability*

- Requires staff time for coordination and maintenance of schemes and support but has the potential for relatively few financial demands.
- Could use existing VLE networks throughout Wales to deliver and share training to reduce travelling costs.

4.11.7. *Notes:*

- Increased use of video-conferencing to allow more to participate from their own or local institutions.

4.12. Collaborative Information Skills

4.12.1. *Existing activity:*

- Some coverage through training events.

4.12.2. *Potential initiatives:*

- Interest in developing customisable shell for Information Skills Teaching (maybe by EduServ?) Scope for looking at this Wales-wide? Need to address delivery of info skills in Wales if not nationally.

4.12.3. *Benefits:*

- Linkage to 4.11.

4.12.4. *Challenges:*

- Is Wales the right size unit to do this: would UK-wide be better?

4.12.5. *Drivers:*

- *Reaching Higher*.

4.12.6. *Resource Required /Achievability*

- Requires staff input rather than specialised technological costs.
- As this activity is being carried out to some extent at each LIS in Wales, any increase in collaboration in this area could only cut costs and shared expertise and training could lead to more efficient and effective service.

4.12.7. *Notes:*

- Needs addressing at CyMAL / strategic level.
- Cross-sectoral aspect crucial: developing information literacy at primary school level up.
- Build on work of SCONUL and of Open University's MOSAIC resource.

4.13. Data Protection / Records Management / Copyright

4.13.1. *Existing activity:*

- Shared staff between UWA, UWL, Trinity College Carmarthen.
- WHELP Records Management Group was established in 2002 to address the requirements of the Freedom of Information Act.
- Existing use of expertise in UWB and UWS.

4.13.2. *Potential initiatives:*

- Develop champions of Records Management & Copyright & Data Protection who can act as advisors throughout Wales HE LIS. Individual institutions can still maintain staff with these responsibilities but use expertise of others in these key areas. Use VLEs as a vehicle for gathering information together – policies, laws, etc.
- Linkage to collaborative collection storage.
- HEW to appoint Officers to deal with issues on Wales-wide basis.
- Shared record management store.

4.13.3. *Benefits:*

- Need for all institutions to be addressing these issues.
- Identifying expertise in these important compliance areas.
- Reduce duplication of effort in producing generic support documentation and delivering training.
- Sharing expertise and experience with complicated queries.

4.13.4. *Challenges:*

- Staff resource implications.
- Would these issues be better supported on a national or Wales-wide or regional basis?

4.13.5. *Resource Required /Achievability*

- As compliance in this area is required by each LIS in Wales, any increase in collaboration in this area could only cut costs and shared expertise and training could lead to delivery of a more efficient and effective service.

4.13.6. *Drivers:*

- Need to be compliant with current legislation including Data Protection Act 1998 and the EU Copyright Directive.

4.14. Disaster planning

4.14.1. *Existing activity:*

- WHELP procurement of Harwell Dryers service. WHELP members who signed up for this cooperative purchase get priority user status in event of a disaster.

4.14.2. *Potential initiatives:*

- Encourage and support all institutions to develop Disaster Plans.
- Scope to examine other aspects of disaster planning cooperatively, including preservation.
- Shared training in avoiding disasters and better preservation of resources.
- Development of cooperative support strategies such as the M25 Consortium's "Multilateral agreement for mutual subject support in the event of a disaster" plan.

4.14.3. *Benefits:*

- Shared expertise in disaster management areas.
- Potential savings on group deals (i.e. Harwell).
- Use of shared expertise and experience to identify areas of disaster planning training.

4.14.4. *Challenges:*

- Time and staff resource implications.

4.14.5. *Drivers:*

- Need to be aware of all disaster control management issues.

4.14.6. *Resource Required /Achievability*

- Staff time in sharing information and expertise.

4.14.7. *Notes:*

- See the M25 Disaster Management Working Group
<<http://www.m25lib.ac.uk/m25sec/business/disaster/disasterwghome.html>>

4.15. WHELP

4.15.1. Existing activity:

- WHELP Development Fund – based on WHELP subscriptions.
- RSLP Projects.
- Annual Colloquium at Gregynog.
- CROESO.
- WALIA.
- WHISD.
- HELP Project and Programme.

4.15.2. Potential initiatives:

- Need to build on WHELP: use as facilitator for increased collaborative activities.
- Need for WHELP to appoint Executive Officer / Development Officer to drive forward ideas into actions and to bid for funding.
- SCURL has been more successful with resource discovery projects: adopt some of their models.

4.15.3. Benefits:

- Ability to take a holistic approach to collaboration and support all institutions.
- A chance to coordinate collaborative activities throughout Wales and encourage cross-sectoral and cross-domain initiatives.
- Use of existing working infrastructure.
- Carrying forward the collaborative momentum.
- Use of expertise and experience of WHELP members.
- Scope: WHELP represents all HEI libraries and NLW as well as having connections with SCL, Further Education libraries, public libraries and the NHS. A representative from Higher Education Wales is invited to WHELP meetings.

4.15.4. Challenges:

- Difficult to balance to advantages of coordinating collaboration from one organisation rather than encouraging and promoting collaboration from within institutions.
- Danger that collaboration is seen as imposed on institutions rather than owned and controlled by them.

4.15.5. Resource Required / Achievability

- External support needed for all or part of Executive or Development Officer post to progress and gain cost-benefits from collaboration. SHEFCE has provided funding for a similar post for SCURL for the last three years.

Technical issues

4.16. Shared systems

4.16.1. Existing activity:

- Plan for all-Wales library management system for UWCM & NHS libraries
- Some local collaboration (mainly bi-lateral).

4.16.2. Potential initiatives:

- Potential for shared systems cooperation and collaboration such as: common platform, common standards, collaboration on shared work on library systems.
- Scope for investigating use of shared library management systems? OHIOlink model and other state-wide shared library systems in the USA.
- Scope for some cross-sectoral activity for clients of a particular library management system.

4.16.3. Benefits:

- Savings and efficiencies.
- Easier to integrate.
- Shared training costs.
- Expertise shared – staff resource implications.
- Greater ability to share data and resources between institutions.

4.16.4. Challenges:

- Licensing issues.
- Timing – unlikely for all institutions to be in a position to purchase new system/platform at the same time.
- Potential for loss of expertise in smaller institutions as they become reliant on “host” institution.

4.16.5. Drivers:

- Costs of systems, servers and platforms.

4.16.6. Resource Required / Achievability

- Initial investment in a new, shared library management system.

4.16.7. *Notes:*

- It was noted in one focus group that if the group were looking at Voyager purchase today, may well consider sharing server(s) on which to run it.

4.17. Wales-wide portal

4.17.1. *Existing activity:*

- Wales on the Web/Cymru ar y We.
- Culturenet Cymru.

4.17.2. *Potential initiatives:*

- All-Wales portal (MLE framework?) – registered access determines what level of material you get access to (HE/FE/public etc).

4.17.3. *Benefits:*

- Seamless access to resources for users.
- Greater range of resources accessible.
- Improved resource discovery.
- Supports distance learning, e-learning and part-time learning.

4.17.4. *Challenges:*

- Technological barriers.
- Cost implications.
- Is there a need for common platforms or will improved technologies lead to seamless access between different platforms anyway?

4.17.5. *Drivers:*

- Sharing expertise.
- Lifelong Learning.

4.17.6. *Resource Required/Achievability*

- Structure already in place to deliver through CultureNet Cymru and Wales on the Web.
- National ICT Strategy (Cymru Ar-Lein) will provide a more standardised approach for interoperability (especially needed for public and school libraries).

4.17.7. *Notes:*

- LSE has developed “visitor terminals” giving external users electronic access to all materials available that have no restrictive clauses on their access.

- Need for study to examine restrictions to access to electronic content/resources via Welsh HEIs and to highlight what can be made available.
- Some aspects of licences and access to electronic resources have been examined by HELP e-learning feasibility study.

4.18. Shared MLE / VLE

4.18.1. Existing activity:

- Some inter-institutional sharing planned (for example, UWS and Trinity share Blackboard platform, support and training).
- HELP Project's E-Learning Feasibility Study.

4.18.2. Potential initiatives:

- Potential to look at VLE on joint basis using Blackboard as infrastructure, to exploit intellectual value of content.
- Potential to look at shared VLEs. Bangor has done much work on developing a Welsh language version of Blackboard. Work involved in duplicating this effort on other VLE frameworks?
- Co-operative discipline-based portals in subject areas: to be explored in HELP e-learning feasibility study.
- Organisations such as JISC/Funding Councils/CyMAL should become involved in arranging "national licenses" for electronic resources (and clear vision on authentication) in order to ensure equality of provision across HE institutions and to facilitate collaboration.

4.18.3. Benefits:

- Access to greater number of resources online.
- Increase expertise in all institutions in e-learning opportunities.

4.18.4. Challenges:

- Appropriateness of generic content and subject based content to different institutions.

4.18.5. Drivers:

- Supports Lifelong learning initiatives.

4.15.6. Resource Required / Achievability

- Could be significant licensing implications: most commercial VLE systems provide institutional licences based on student numbers.

Appendix 1 – Focus Group Interviews

Help Project Focus Meeting @ UWIC 2pm on 25th February 2003

Paul Riley - Head of Library Division, University of Wales Institute, Cardiff

Judith Agus – Librarian, Wales College of Music and Drama, Cardiff

Philip Martin - CIO and Director of Information Services, Cardiff University

Help Project Focus Meeting @ Glamorgan 10.00am on 28th February 2003

Jeremy Atkinson - Head of Learning Resources Centre, University of Glamorgan

Janet Peters - Head of Library & Information Services, University of Wales College, Newport

Steve Pritchard – Director of Library Services, University of Wales College of Medicine

Help Project Focus Meeting @ Swansea 2pm on 28th February 2003

Christopher West - Director of Library & Information Services, University of Wales Swansea

Elinor Le Bourdon - Learning and Information Resources Manager, Trinity College,

Carmarthen

Tony Lamb - Head of Library and Learning Support Services, Swansea Institute of Higher

Education

Help Project Focus Meeting @ NEWI 2pm on 5th March 2003

Nigel Soane, Director of Library Services at University of Wales, Bangor.

Paul Jeorrett - User Services Manager, North East Wales Institute, Wrexham

Help Project Focus Meeting @ Aberystwyth 10 am on 6th March 2003

Mike Hopkins – Director of Information Services, University of Wales, Aberystwyth

Bill Hines - Assistant Director, Library and Advisory Services

John Newton – Assistant Director, Library Support Services

Andrew Green – Librarian, National Library of Wales

Rhidian Griffiths – Keeper of Printed Books, National Library of Wales

Miriam Perrett - Systems Librarian, University of Wales, Lampeter

David Selwyn - Founders Library, University of Wales, Lampeter

Cross-sectoral meetings

Huw Evans – CILIP Wales on 29th April 2003

Linda Tomos on 14th May 2003

Lis Parcell - RSC Wales on 6th October 2003

Andrew Eynon - Llandrillo College on 29th October 2003

Priscilla Dawson - Swansea College on 4th November 2003

Jan Hooper - Royal Glamorgan Hospital Library on 4th November 2003

Rona Aldridge - Conwy on 18th November

Hywel Roberts – 13th January 2004

Appendix 2 – Focus Group / Meeting Points of discussion

Objectives

1. Details of current state of collaboration in HEIs in Wales from institutional view point
2. Impact of external environment on existing collaboration
3. Perceived and real benefits of existing collaboration (cost-efficiencies?)
4. Identify the potential of future collaborative activities
5. Barriers to collaboration (external, cost, staff, resources, time, resistance from academics)

A: Current collaborative activities:

Levels of collaboration within areas of LIS activity (based on RSPL Barriers Study)

	Collaboration	Resource Sharing	Deep Resource Sharing
Access			
Collections			
Staff			
Technical Services			
Infrastructure & Storage			

Geographic

- UK-based
- Wales-based (WHELP, WALIA)
- Regional (e.g. LINC y Gogledd)
- Local / local authority (e.g. NEWLIS, GALW, ATLIS)

Drivers for collaboration

- Improve services
- Achieve economies of scale
- Reduce overheads & workloads
- Cope with rising costs / reducing budgets
- Exploit potential of IT
- External influences

Current levels of collaborative activity

- What collaborative activities do you currently engage in and at what levels? (see table)
- To what extent does collaboration currently play a significant part in/impinge on the work of/services offered by your Library?
- In what ways does collaboration currently have practical significance/bring benefits for a) library users b) library managers c) library operations?

B: Future plans and priorities

Resource-sharing

- Increased resource discovery (metadata, union/serials lists, collection descriptions)
- Physical access (access policies, cost implications, interlibrary loan, borrowing rights)
- Networked access (electronic document delivery, UK Computing Plus)
- Shared training / staff events (WHISD)
- Consortial purchase (licensing, access)
- Collaborative collection management (acquisitions, weeding, storage, deep-resource sharing)

E-learning

- Practical models for local, regional and all-Wales collaboration
- Digitisation and shared e-resources
- Platforms (VLE, library systems)

Services

- Shared library systems
- Shared servers
- Shared systems management and development
- Virtual services and reciprocal access between institutions

Future prospects for collaboration

- Do you see the need for further collaboration? If so at what level – UK, all-Wales, regional/functional, institutional?
- How does cross sectoral and/or cross domain collaboration (viz. CyMAL) rank against further collaboration within the HE sector?
- What kinds of benefits would you be looking for from increased collaboration? (see drivers for collaboration)
- What would encourage/facilitate or make collaboration more easy/effective for you? Pump-priming resources? Extra political impetus? Leadership from WHELP?
- What broad areas would seem to offer the most potential for increased collaboration. What would you hope to see emerge from the HELP project in the way of plans for the future?
- Are there any big ideas that would change the nature of the information landscape in Wales that because of size/cost/etc. are beyond the reach of individual institutions but that we might contemplate as flagship projects?
 - inter-lending and document delivery
 - joint storage facilities

- HE portal and/or e-archive
- union list of books/serials
- e-resources

Attitudes towards collaboration

- Do you view the prospect of further collaboration as a) an imposition to be reluctantly pursued or b) an opportunity to be enthusiastically welcomed?
- What would be the attitude of your institution/users if you were to propose investing resources in collaborative projects?
- What impediments/barriers to further collaboration exist in your view?
- What would make it easier for you to engage in collaborative activity?

Appendix 3 - References

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