

**HIGHER EDUCATION LIBRARIES IN PARTNERSHIP
(HELP) PROJECT**



**PART 5:
PARTNERSHIP PROGRAMME**

**WALES HIGHER EDUCATION LIBRARIES FORUM
June 2004**

1. INTRODUCTION

A principal objective of the HELP Project as stated in the original project brief was to 'define a strategy and a complementary action plan to strengthen resource sharing and deepen LIS collaboration between HE institutions at a local, regional and national level in Wales and with institutions in other sectors, particularly the National Library of Wales'. The aim was to assess whether the conditions were right for WHELF to adopt a much more pro-active role in addressing the collaboration agenda and to use the information and knowledge generated by the project to construct a draft action plan for consideration by WHELF, consisting of a series of priority actions in areas identified during the course of the project as being particularly suitable for a collaborative approach.

In the event, the HELP project has indeed completed much of the groundwork and generated much of the data and raw material that is a prerequisite if WHELF wishes to prepare and implement a coherent plan to guide its future collaborative activities. The purpose of this report is to interpret the findings of the project and to re-package them in such a way as to enable WHELF to prepare such a plan. For the sake of convenience the collaborative plan that might emerge from this process is referred to as the WHELF Partnership Programme in this document.

2. EXTERNAL ENVIRONMENT

Observations and comments made by respondents together with information and data gathered during the conduct of the Collaboration Review strongly suggest that the essential conditions for strengthening the collaborative approach to service provision are present in the external environment and that there is no better time for WHELF to reach for full maturity by taking a defining role in shaping the future LIS landscape in Wales. The principal external factors that determine the context within which HE libraries operate and that lend support to this contention are outlined below.

- ***Political climate***

The strong emphasis on reshaping the higher education sector in Wales placed by the Welsh Assembly Government in its bold 10 year strategy for higher education *Reaching Higher: Higher Education and the Learning Country – a Strategy for the higher education sector in Wales*, supported by complementary policies and funding streams from HEFCW, has pushed reconfiguration and collaboration to the top of the strategic agenda. The subsequent creation of the Reconfiguration and Collaboration Fund by HEFCW and the earmarking of funds

expressly for reconfiguration and collaboration has focussed minds and generally created a much more receptive climate within institutions to the collaborative approach that WHELF has long since espoused and upon which the HELP project seeks to build.

- ***Institutional change***

The HELP project coincided exactly with the flurry of negotiations, discussions and joint activities provoked by *Reaching Higher* on options ranging from full institutional mergers, through wide-ranging strategic alliances to subject rationalisation and more modest understandings and agreements in specific areas of institutional activity. Although such engagements demand priority attention, can be all-consuming in terms of senior staff time and inevitably create a sense of uncertainty, the coincidence of timing has been, on the whole, beneficial to the project. The prospect of major structural change has encouraged a widening of institutional horizons and a willingness to contemplate new ways of doing things, as evidenced, for instance, by the agreement reached between Trinity College, Carmarthen, the University of Wales Aberystwyth and the University of Wales Lampeter to create shared posts for Records Management and Data Protection. Recent and impending appointments of new Vice-Chancellors in a significant number of institutions merely add to the sense of institutional movement and change, offering the prospect of fertile conditions in which a Partnership Programme can thrive.

- ***Strategic development***

Wales is a small country with limited resources for educational and cultural provision. The announcement by the Welsh Assembly Government that it would establish a new division, CyMAL: Museums, Archives and Libraries Wales, to maximise the contribution of libraries, archives and museums to the economic, educational, cultural and social life of Wales coincided with the HELP project and has provoked a widespread sense of anticipation and expectation within the libraries domain in Wales. CyMAL will be expected to provide strategic leadership to the sector as a whole by creating a holistic vision of how each of its three constituencies can move forward together to enhance the services and facilities they offer to the people of Wales. It is already clear that CyMAL will seek to achieve its goals through partnership and collaboration with relevant organisations, thereby providing WHELF with a unique opportunity not only to further promulgate the spirit of collaboration and cooperation but also to work in close association with CyMAL to develop a common approach to the achievement of both CyMAL's aims and the HELP agenda.

- ***Professional landscape***

At a United Kingdom level the announcement by the Joint Funding Councils that they would implement the main recommendation of the Research Support Libraries Group (RSLG) by creating a new national body, the Research Libraries Network (RLN), to implement its vision

of a UK-wide strategy for the provision of research information, was another exciting development that chimed with the objectives of the HELP project. Indeed, the considerable degree of commonality between the programme of work identified in the RSLG report and the findings of the HELP Collaboration Review is notable and suggests that real opportunities will emerge as a result of the RLN initiative for WHELP to address the HELP agenda whilst at the same time contributing to wider UK initiatives. Recent publication of the *JISC Strategy 2004-2006* also suggests that the substantial programmes, projects and initiatives for which JISC is responsible will continue to provide significant opportunities for contributions to a UK-wide agenda.

RECOMMENDATION 1: that WHELP should seize the opportunity provided by a coincidence of favourable external circumstances to develop a Partnership Programme designed to strengthen collaboration between HE institutions and with other relevant domains

RECOMMENDATION 2: that in the preparation of this Partnership Programme WHELP should take particular note of the external climate within which academic libraries operate and seek ways in which it can complement and contribute to the political, institutional and professional agendas which make up this wider contextual background

3. CHALLENGES

Although the general climate is conducive to a major initiative in respect of collaboration the HELP project did, inevitably, highlight a number of constraints of both a generic and specific nature that will need to be taken into account when devising a Partnership Programme. The Collaboration Review, published in full as Part 2 of this report, records numerous general and specific issues identified by WHELP members during the course of focus group discussions. The principal recurring themes are summarised below:

- Wales may not be the most appropriate geographical unit for some types of LIS collaboration. In some cases Wales would not offer sufficient economies of scale to justify a collaborative approach and in others UK-wide initiatives, already in train or in prospect, offer better value for money. Topics such as authentication, licensing, collaborative procurement were most often cited in this context.
- The geography of Wales precludes or makes unattractively expensive some forms of collaborative activity on an all-Wales basis. Poor communications, lack of physical accessibility and associated high overheads and transport costs were cited as

- practical obstacles in the way of all-Wales schemes for shared storage of little used materials and inter-library lending and document delivery.
- The diversity of the HE landscape in Wales, with the considerable disparity between the size, mission, resources and user base of institutions, makes it difficult to identify a collaborative programme of equal relevance and value to all WHELF members and from which all members would gain a reasonable return on their investment. The prospect of the largest institutions, on the one hand, being lukewarm in anticipation of being net contributors with little prospect of strategic gain and of the sheer size of the smallest institutions precluding them from full participation was highlighted during the Collaboration Review.
- The potentially high start-up and implementation costs associated with many of the most attractive collaborative schemes (such as resource discovery tools, collaborative storage) are daunting and well outside the current capacity of WHELF to deliver. The lack of a dedicated WHELF budget and the constraints that sectoral funding streams impose on the eligibility of expenditure was highlighted.
- The very different mission, strategic objectives, funding streams and management arrangements under which the National Library of Wales operates make it difficult to achieve a close match between the aspirations and priorities of HE libraries and those of what is by far the biggest research library in Wales.
- Although collaboration is at the heart of the current political agenda it was observed that it does not necessarily sit comfortably with other tendencies that continue to exert a strong influence at an institutional level. The sometimes conflicting relationships between collaboration and competition, sharing resources and generating income and the still strong territorial tendencies evident in many academic communities when deep resource sharing is mentioned were all cited as examples that might constrain collaboration at a practical level.
- At a more micro level the Collaboration Review, supported in respective areas by the two feasibility studies, pointed up a wide variety of policy, practice and technical infrastructural barriers that characterise a diverse and sometimes fragmented sector. The Journals Case Study highlighted how WHELF currently lacks easy access to some of the basic data and information that would be a prerequisite for informed decision-making and collective priority setting in certain areas.

Recommendation 3: that in devising the Partnership Programme WHELF should take note of the concerns, constraints and characteristics of the HE library sector in Wales and ensure that its subsequent plan is relevant, realistic and realisable. In particular, WHELF should seek to:

- *concentrate its attention and actions on issues of particular relevance to Wales whilst at the same time seeking to ensure that, as far as is possible, its policies and actions are compatible with initiatives being undertaken on a UK wide basis*
- *devise policies that take account of the constraints imposed by the geography of Wales but, equally, that build on the fact that a small country provides opportunities to develop policies that are manageable and that can make an appreciable difference*
- *adopt an inclusive approach the aim of which should be to ensure that all member institutions, no matter how big or small, can derive strategic advantage from full participation whilst at the same time recognising that not all WHELF institutions need necessarily participate in all collaborative projects*
- *give particular priority to the ways in which the rich resources of the National Library of Wales can be made more visible and accessible to the academic and research community to the mutual advantage of the National Library and the HE sector*
- *take full account of the resource implications of its proposals for both WHELF and its individual member institutions, distinguishing between measures that are feasible within the current WHELF funding model and those whose affordability and funding would need further investigation*

4. OPPORTUNITIES

Whilst numerous very real obstacles to collaborative working were identified during the course of the HELP project, genuine concerns were tempered by an abiding sense of optimism and a genuine willingness to consider collaborative solutions to common problems when circumstances seemed to offer benefits for both users and parent institutions. Partly, this positive approach derives from the close-knit, harmonious atmosphere generated by WHELF and the genuine friendships that it has brokered between its members. It also derives from an

appreciation of the opportunities that strengthened collaboration would bring for members to do things that would not be possible by institutions operating in isolation. Frequent mention was made in this context of opportunities to:

- Improve services and facilities for library users and promote equality of access by sharing resources and pooling effort. WHELP has an excellent track record in this area, initiating ground breaking reciprocal access schemes, for instance, for the benefits of students and staff long before their UK equivalents.
- Explore the scope for cost efficiencies by economies of scale, reduced duplication, shared use of resources and facilities and higher levels of cooperation in such areas as library storage, acquisition and retention of stock, access to print and electronic journals, use of technical platforms and management systems, staff training and development activities, etc.
- Adopt a more coherent, planned approach to collaboration. Traditionally, WHELP's collaborative activities have emerged on a mainly pragmatic and piece-meal basis, often in response to specific external circumstances. It was widely recognised that the WHELP project now provides an opportunity to take stock, create a strategic vision and devise a coherent plan of action for practical implementation.
- Develop closer working relationships with the National Library of Wales and other types of library for the purpose of widening access to services, resources and facilities for the academic community and for the people of Wales in general.
- Promote the bilingual environment by implementing projects of particular relevance and importance to Welsh language and culture.
- Ensure that WHELP is in a position to respond positively to the opportunities likely to arise from the creation of CyMAL in respect of cross domain and sectoral working and to maximise the opportunities for achieving its own strategic objectives through active participation in joint CyMAL programmes and use of any funding streams that CyMAL might make available.
- Provide a more co-ordinated and coherent all-Wales response to UK-wide initiatives in the LIS sector. The ambitious agenda proposed by the RSLG report for the Research Libraries Network was most often cited in this context but an improved capacity to respond to JISC initiatives and other consortial funding opportunities were also mentioned.

Recommendation 4: that the detailed analysis of collaboration in Wales contained in the Collaboration Review be used as a basis for identifying a number of guiding principles promoting a holistic, inclusive vision of resource provision in Wales. In this regard the Partnership Programme should aim, for instance, to:

- *improve the ease with which academic library users can make effective use of resources held in other academic institutions elsewhere in Wales and beyond*
- *enhance awareness of and access to additional services and specialist resources available in other library sectors, particularly the National Library of Wales, but also in public libraries and more specialist library and information networks*
- *promote equality of access to library resources in Wales by life-long learners, private researchers and other members of the general public*
- *engage with CyMAL and the archives and museums domains in developing a common agenda for the mutual benefit of their respective user communities*
- *develop services and resources that address the particular needs of Wales and that recognise its bilingual society and its rich cultural and historical traditions*

5. STRATEGIC OBJECTIVES

The separately published Collaboration Review records in considerable detail the views of WHELF members on existing collaborative activities and on the scope for future action, noting the benefits, drivers and the constraints likely to be associated with such initiatives. As such it provides much of the raw material that is needed for informed choices to be made about strategic aims and priorities as well as the implications and likely impact of measures to strengthen collaboration between WHELF libraries. Initial assessment of the findings of both the Collaboration Review and the associated feasibility studies suggests that the following recurring themes might provide a strategic framework around which to build a Partnership Programme. They are neither mutually exclusive nor listed in order of priority.

- **Maximising the use of library collections**

One of the most tangible ways in which WHELF can give practical expression to the holistic vision referred to in the previous section is to consider institutional collections as part of a larger national resource and to develop ways of managing and maintaining library collections in a more co-ordinated fashion. Libraries are often cited as examples of rich but expensive resources common to all HEIs that pose identical problems and that must offer scope for rationalisation and cost efficiencies. Areas of common interest mentioned as being suitable for consideration as part of a Partnership Programme covered the whole life cycle of items from selection, acquisition, retention and use to de-selection and disposal as well as associated issues regarding digitisation, long-term storage and preservation. However, it was recognised that rationalisation of academic programmes across institutions and powerful 'territorial' forces come into play when deep resource sharing measures are mentioned. It would also be true to say that this was a broad area in which there was no consensus about the leadership role that the National Library of Wales might be reasonably expected to play in respect of, for instance, national schemes for collaborative storage, inter-library lending and document delivery. Against a background of unsubstantiated assumptions, uncertainties and very real practical issues the Partnership Programme can provide an opportunity to investigate to what extent collaboration in specified areas is a viable and practical way of widening access to resources and reducing wasteful duplication.

- **Improving resource discovery**

Considerable support was expressed for actions to build on the success of collaborative RSLP projects and other consortial initiatives such as *Wales on the Web* and *Gathering the Jewels*. The creation of web-based union lists of journals, Welsh language materials and/or other library holdings, more integrated online catalogue searching and online tools providing collection descriptions and mapping research strengths were all mentioned as examples of practical ways in which a collaborative approach might improve services to users. At a more strategic level, there was also recognition of the need to unlock the rich library resources of Wales as a whole through a range of comprehensive resource discovery tools that enable all users seamlessly to cross sectoral barriers and by-pass the physical barriers imposed by the geography of Wales. Virtual access to the contents of all libraries in Wales would enable academic users to benefit from a much richer and more diverse resource base and life-long learners and other members of the public to enjoy unprecedented access to academic library resources. Improved resource discovery of this kind would provide very visible service rewards, would act as an essential building block for cooperation across domains and act as a timely response to the lifelong learning and social inclusion agendas.

- ***Widening access to collections***

The ground-breaking lead taken by WHELF in providing for reciprocal access to all HE libraries in Wales through such schemes as WALIA and GROESO was noted with some satisfaction and similar UK-wide schemes such as UK Libraries Plus and SCONUL Research Extra were also welcomed. Whilst there is still scope for extending rights of access and use across the HE sector in Wales (borrowing rights for taught postgraduates, for instance) it was suggested that opening up access to local or regional resources on a cross sectoral basis should now take precedence. Innovative local or regional access schemes such as ATLAS, GALW, NEWLIS and Linc y Gogledd have generated tangible benefits for users without any sign of the 'swamping' effect that has often been cited as a reason for impeding progress. It remains a source of some disappointment within WHELF that earlier attempts to obtain funds to extend this approach across Wales were unsuccessful. Hopes were expressed that the advent of CyMAL would provide renewed opportunities for creating a national framework within which local communities could be encouraged to devise partnerships designed to suit their own particular circumstances and requirements and through which they could provide local users with an entitlement to use a much wider range of local resources than hitherto possible.

- ***Connecting with the National Library***

HE libraries have great respect and affection for the National Library of Wales and readily recognise the huge debt of gratitude they owe to the Librarian and his senior managers for the leadership and practical support they provide to WHELF and HE libraries in general. They also recognise that despite the best efforts of both the National Library and HE libraries the vast resources of the greatest research library in Wales remain largely untapped by more than a handful of its potential academic users and that if this situation can be changed then the potential rewards for both the National Library and the academic community are huge. The preparation of a Partnership Programme offers WHELF an opportunity to consider what steps might be taken to make the resources of the NLW more accessible and how a greater awareness and understanding of their relevance and richness can be effectively imparted to members of the academic community. It also offers an opportunity to explore other innovative ways in which links between the National Library and HE libraries might be further strengthened in areas where the special status of the National Library as both a legal deposit library and a national icon give it a unique and critical role to play.

- ***Creating the virtual academic library***

The concept of a virtual academic library, providing a diversity of users with seamless access to the information they need irrespective of where they or the information is located, was another way used by WHELF members to express their desire to obviate

obvious inequalities of access and provision, in this case with particular emphasis on the use of technology to maximise access to mainly electronic resources. It was recognised that the virtual library environment offers many exciting ways of overcoming the constraints and barriers readily associated with the traditional print environment and represents a rich arena in which activities already noted in previous paragraphs like improved resource discovery, collaborative purchase, union listings, shared systems, document supply and storage become much more attainable. Here too particular reference was made to the unique role that the National Library could play in such areas as digitisation, access to e-resources, digital archiving and the electronic only supply of journal articles, etc.

- ***Promoting the e-learning agenda***

The e-learning agenda is another theme that permeates the whole of the HELP project but which for the purpose of this exercise is used as shorthand for a wide variety of activities to facilitate and support e-learning that have potential for inter-institutional working and that formed the principal focus of the E-Learning Feasibility Study. Portal technology, its effective application in the library context, the complexities associated with content and the interface with information providers, users and other library systems are all key issues investigated by the E-Learning Study. Indicative topics suggested as being worthy of more detailed investigation included the development of core electronic journal collections; joint digitised short loan collections; collaborative activities in respect of the production of e-resources, including negotiations on rights, procurement, digitisation, storage and delivery; authorisation and authentication; the development of common systems and information environments across institutions and interfaces between different platforms and systems.

- ***Delivering a more efficient service***

In addition to activities already mentioned the HELP project also identified numerous ways in which shared access to and use of resources could provide administrative and cost efficiencies as well as service enhancements. Human resources was readily identified as one area in which much had already been done through WHISD and other joint staff development and training activities, including the sharing of posts and expertise across institutions. The IT infrastructure upon, which so many library operations and services now depend, was another identified area where relatively modest achievements have been made but where opportunities exist for larger institutions to assist smaller ones and for inter-institutional working generally to increase efficiency and enhance services. Although a standardised approach to the use of software platforms, library management systems, virtual learning environments, portals and other learning technologies would raise very substantial strategic, logistical and funding issues the transformation that a

more collaborative approach to procurement, development and use of library systems would bring across Wales is potentially huge and justifies further investigation.

Recommendation 5: that the heart of the Partnership Programme should consist of a series of strategic objectives based upon an assessment of the substantial volume of evidence gathered during the conduct of the Collaboration Review and the two associated feasibility studies. These strategic objectives should embrace the following themes:

- *Developing library collections*
- *Improving resource discovery*
- *Widening access to collections*
- *Connecting with the National Library*
- *Creating a virtual academic library*
- *Promoting the e-learning agenda*
- *Delivering a more efficient service*

Recommendation 6: that each strategic objective should be itself divided into a number of action lines reflecting broad areas of potential collaborative activity from which specific actions and discrete projects will flow

6. THE ROLE OF WHELF

Consideration of an ambitious programme of collaborative actions on a scale not previously contemplated inevitably raises questions about organisation, management and funding. More particularly, it brings into question the role of WHELF and its capacity to drive the agenda forward, to perform essential co-ordinating functions and, not least, to provide funds and administer budgets. It has already been acknowledged that the HELP project itself would not have been possible without external HEFCW funding and that WHELF has reached something of an organisational crossroads. It is consequently imperative that WHELF takes the opportunity not only to contemplate what it might achieve by way of increased collaboration but also what measures it might have to contemplate at an organisational level in order to make the Partnership Programme achievable.

6.1 Structure

WHELF is a much loved organisation that works very well as a channel of communication through which members can keep in touch, share information, exchange ideas and co-operate. It is consequently important that the characteristics that command allegiance and that make it both enjoyable and effective are not lost in any rush of enthusiasm for change. However, it is also generally recognised that the current organisational model has reached capacity and that

some changes are necessary if it is to develop the strategic leadership role envisaged in this document. Some of these possible organisational changes are briefly listed below.

- Appoint a WHELF Development Officer to perform the kind of role already undertaken within SCURL in Scotland, with obvious implications for funding and the consequent impact on the ability of WHELF to fund other activities
- Create a small WHELF Executive Committee from within the existing membership to manage and conduct business between the twice yearly Gregynog meetings, thereby increasing capacity but at the cost of increased personal commitment on the part of the individuals concerned
- Appoint honorary officers to undertake specific tasks (e.g. Projects Officer to prepare funding bids) – a variation on the proposal above
- Investigate whether closer affiliation with other professional bodies (e.g. SCONUL or CWLIS) might increase capacity by providing tangible administrative or financial support
- Review the membership of WHELF, particularly in the context of institutional mergers, and consider whether additional members from within WHELF institutions or from the non-HE sector might strengthen capacity
- Consider whether the more frequent use of working groups and further extension of the current network of special interest groups like WHISD, GWELD, CIRCyM might allow more business to be concluded in a distributed but still coordinated fashion

6.2 Funding

WHELF has no budget and has traditionally relied on the generous support of its members, who give freely of their time and institutional resources, and on the good offices of the National Library of Wales for its administrative requirements. It is patently obvious that if WHELF is to develop a Partnership Programme then a review of funding options is essential. Some of the options listed below were debated by WHELF at its meeting in October 2003 when it was agreed that final decisions would be taken in the light of the findings of the HELP project.

- *Membership subscriptions.* Recommendations for the creation of a subscription base for WHELF have already been debated and accepted in principle. Such subscriptions would, in effect, replace contributions to the WHELF Development Fund (see below) and would provide a regular income for supporting the collaboration agenda. Further work is needed on subscription banding, taking particular account of the likely trend towards a smaller number of larger member institutions.
- *WHELF Development Fund.* Recommendations have also been accepted in general terms for a more strategic and structured approach to the use of the WHELF Development Fund. Although accumulated balances provide obvious and immediate opportunities to fund collaboration projects more detailed consideration will need to be

given to issues concerning long term sustainability and the strategic choices to be made between funding collaborative projects and other deserving WHELF activities.

- *Grant-in-aid.* In successfully obtaining funding for the HELP project from HEFCW a link was created between WHELF and achievement of the Welsh Assembly Government's strategy for higher education. The possibilities of further funding from HEFCW specifically for implementation of the HELP agenda or, more generally, for supporting the work of WHELF as a whole (in much the same way as SHEFC has provided funds for SCURL) are worthy of further investigation.
- *Affiliation.* If closer and more formal relations with SCONUL were to be considered feasible and desirable then consideration might also be given to whether a portion of the SCONUL subscription of Welsh institutions could be reserved for use by WHELF. In similar vein the current uncertainty about the future of CWLIS raises questions about CWLIS subscriptions paid by WHELF members and the possibilities that might emerge for WHELF to benefit more directly from the use of such subscriptions partially to fund the recently created post of Library and Information Services Development Officer (in partnership with CILIP Cymru).
- *Project funding.* Competitive bids for external project funding have in recent years been the most productive way through which WHELF has secured income to fund cost-generating activities. Although short-term and ring-fenced such funds have provided a welcome boost and generated much of the momentum upon which the HELP project now seeks to build. However, the experience of consortial bidding for external funds clearly demonstrated that it is a time-consuming and specialist task and that if WHELF wishes to maximise the increasingly numerous opportunities for project-based funding then it needs to develop capacity and expertise in this area.

Recommendation 7: that WHELF should create a small Task Force to consider its future role and remit, with particular regard to what changes in membership, organisation and funding might be required to provide WHELF with a capacity to sustain a Partnership Programme and to grow and become more effective as an organisation

7. NEXT STEPS

The Partnership Programme envisaged in this document would impinge so fundamentally on WHELP as an organisation that it seems logical that the Task Force proposed in the previous section should also be invited to take account of and oversee the creation of the Partnership Programme. Some of the more practical aspects associated with this task are highlighted below.

7.1 Working methods

Although an ambitious and holistic action plan to develop the collaboration agenda over coming years should be viewed as a key prerequisite for the continued growth of WHELP as an organisation it should not become all-consuming to the extent of constricting development in other areas or threaten the characteristic enthusiasm with which members approach participation in WHELP activities. It will be important, therefore, to maintain a sense of proportion, to balance collaboration activities with other developmental areas, such as the representational and advocacy roles, and always take full account of what is affordable and realisable. In this respect it may be sensible to pursue the following working methods when constructing a Partnership Programme.

- *Adopt a modular and flexible approach.* Once the overall vision, strategic themes and main action lines of the Partnership Programme have been defined implementation can proceed at different rates in different areas without prejudicing the overall vision as circumstances change and opportunities arise
- *Adopt an incremental approach.* Consider the Partnership Programme to be a statement of core values, strategic objectives and guiding principles, with specific actions, timescales and targets for implementation being applied to individual parts of the programme as they come on stream rather than to the Partnership Programme as a whole
- *Adopt an inclusive, bottom up approach to implementation.* Once WHELP itself has established the overall vision and priorities it would be sensible to spread the burden, share ownership and acknowledge staff expertise by creating a series of inter-institutional thematic working groups composed of specialist staff from WHELP institutions to develop the vision in particular areas and to make proposals for specific actions. The mere act of working together on a common agenda would mean that this network of specialist working groups would in itself strengthen WHELP and constitute an important contribution to the collaboration agenda.
- *Make a clear distinction between different types of collaboration and the nature of the funding upon which each is dependent.* In this context a funding model could be envisaged in the shape of a pyramid consisting of at least four layers, with its wide base

consisting of collaborative measures whose resource implications can be subsumed by participating WHELF institutions, a narrower range of measures that would require WHELF Development Fund support, a limited number of measures that would require deep resource sharing between institutions and, at the apex, a small number of measures that are only possible with significant external project funding.

- *Seek external help in both funding and implementing relevant aspects of the Partnership Programme.* It is already clear that many of the aspirations expressed and proposals made during the course of the HELP project are not achievable by WHELF alone either because they are too expensive and/or because they are of a cross sectoral nature and are dependent on circumstances or actions over which WHELF has no direct control. In this context it will be important for WHELF to identify those areas of the Partnership Programme that resonate with the strategic agendas of other organisations like HEFCW and CyMAL and to engage with such bodies accordingly.

Recommendation 8: that the HELP Steering Group be re-constituted as the Task Force envisaged in Recommendation 7 above and that it be invited to create a detailed and practical Partnership Programme for consideration by WHELF at its meeting in October 2004

Recommendation 9: that in defining the Partnership Programme the Task Force should devise a programme which is flexible, inclusive and achievable and should:

- create a series of specialist working parties to provide input to the planning process*
- engage with other organisations, particularly HEFCW and CyMAL, that have a common interest in the collaboration agenda and with whom WHELF might be able to work on joint projects*
- consult widely with professional bodies and key players in other library domain in Wales and seek cross domain and sectoral collaboration wherever appropriate*