
Building on collaboration: the WHELF e-book deal

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In December 2007, at an event at the National Library of Wales, WHELF (the Wales Higher Education Libraries Forum) launched its innovative e-book deal arranged with the Online Computer Library Center (OCLC). During the launch event there were various presentations, including coverage of WHELF and its collaborative activities and an overview of the project.

WHELF AND ITS COLLABORATIVE ACTIVITIES

WHELF has a membership comprising the Librarian of the National Library of Wales, the Directors and Heads of Library and Information Services of all higher education libraries in Wales and, more recently, the WHELF Development Officer.¹ WHELF's mission is to promote cooperation among library and information services, to encourage the exchange of ideas, to provide a forum for mutual support and to help facilitate new initiatives in library and information services provision.

Over the last ten years, WHELF has developed from a relatively informal organisation that met twice a year to a much more structured organisation, meeting more regularly and with a more proactive approach, as shown in its range of collaborative projects, an action plan and a separate development group.



(l-r) Jeremy Atkinson, Robin Murray, Scott Wasinger, Paul Riley

Early successes of WHELP included:

- the development of pioneering library access schemes involving all the Welsh higher education institutions (the WALIA (Welsh Academic Libraries Inter-Access) scheme for researchers and the CROESO ('welcome' in English) scheme for students)
- some successful joint project bids, for example the 'Mapping Wales' project funded by the Research Support Libraries Programme (RSLP)
- a very active staff development and training group (WHISD), jointly operated with the sister IT group HEWIT (Higher Education Wales Information Technology), responsible for a range of activities including a large and successful annual colloquium.

A key period of development for WHELP took place in the period 2002–2003, which was a time of significant strategic change within the higher education sector in Wales. The Welsh Assembly Government had put a strong emphasis on reconfiguration and collaboration, which led to the merger in 2004 of Cardiff University and the University of Wales College of Medicine. There was major cross-sectoral change as well with the creation of CyMAL (Museums, Archives and Libraries Wales) to provide an integrated and holistic approach to policy development across the three sectors.

Given these strategic changes, WHELP thought it timely to initiate a major development to build on existing collaboration and to take a more active strategic-leadership role for the Welsh higher education library sector. It achieved this through the HELP (Higher Education Libraries in Partnership) project,² funded by HEFCW (the Higher Education Funding Council for Wales). The HELP project was concerned with the review and development of Welsh academic library collaboration and had four key elements:

- collaboration review: a comprehensive picture of existing and potential collaborative activity within the higher education library sector and between the sector and other relevant sectors in Wales was built up through interviews with HE librarians and librarians in other sectors; desk research was used to provide a UK and international perspective
- feasibility / case studies: two studies, on e-learning and journals, were carried out in areas where there was interest in and potential for collaboration to provide improved services and/or efficiency gains
- action plan: the findings of the project were used to devise an action plan which would provide WHELP with an agreed agenda for future collaboration.

At the end of the project in 2004, WHELP organised a collaboration conference in Cardiff to disseminate and promote the outcomes of the HELP project and the activities of other organisations

active in HE library collaboration. These included SCURL (Scottish Confederation of University and Research Libraries), the M25 Group and NoWAL (North West Academic Libraries), whose developments are reported elsewhere in this issue of *Focus*.³

In the last three to four years, WHELF has developed further. A WHELF development group has been set up to develop, revise and monitor WHELF's action plan and to take the lead on some major strategic developments. Key to this work has been the appointment of a part-time development officer, funded by subscriptions from WHELF member organisations. There have been other achievements that link closely to the strategic priorities agreed by WHELF. Two successful repository project bids to JISC (Joint Information Systems Committee) have been made, involving all WHELF institutions. Another successful bid to JISC for a digitisation project, 'Modern Welsh Journals Online', was led by the National Library of Wales.

The third major recent achievement has been the e-books procurement project. As a result of the HELP e-learning feasibility study, an objective was included in the WHELF action plan 'to agree a mechanism for achieving cost effective subscriptions with electronic resource suppliers, including e-books'.

OVERVIEW OF THE E-BOOK PROJECT

An email survey was conducted of WHELF members to ascertain the level of interest in a consortium approach to purchasing e-books and also to gather information on which suppliers were being used. The findings of the survey showed that there was significant support for investigating the potential of a shared e-book collection and that NetLibrary was the preferred supplier to begin negotiations.

In April 2007, a steering group was established with representation from each WHELF member. The project objectives were to establish a WHELF NetLibrary shared collection and to establish a group that would be capable of discussing shared e-book purchasing with suppliers.

NetLibrary already had a shared-collection model in use with other library groups and this formed the basis for the WHELF negotiations. The key elements were:

- Each participating library would need to agree to purchase titles outright.
- Each library would need an agreement with OCLC PICA.
- Two copies of each title selected would need to be purchased by the consortium.
- There would be an agreed minimum spend across the consortium.
- From the perspective of users in a particular library, access would be seamless, i.e. there would be a single interface for access to titles previously purchased and for titles purchased as part of the shared-collection model.
- MARC records would be supplied for each partner in the consortium.

It is often difficult enough to agree what titles to purchase within an institution, let alone within a consortium, but this went remarkably smoothly. Each member selected a list of titles from NetLibrary and the consolidated list was checked for duplication and uniqueness. There were few duplicate selections and where there were the cost was split evenly. This took place during July 2007 and the agreement began on schedule in August ready for the start of the academic year. In total, 538 titles were purchased and made available to all students in Wales.

The collection was officially launched at an event in December 2007 at the National Library of Wales. Presentations were made on the project itself as well as setting it in the context of its impact on learning and teaching. This is because the shared collection does not exist in isolation but needs to contribute positively to student learning. This is an area where the JISC national e-books observatory project should prove invaluable.⁴ In addition there were contributions from Robin Murray, vice president global product management, OCLC, and Scott Wasinger, managing director, business development, NetLibrary.

The collection was evaluated in April 2008 by the steering group. NetLibrary provided monthly statistics showing the total accesses across the entire WHELF group as well as a breakdown by individual library. Usage had increased from 1,077 accesses in September 2007 to 3,080 in April 2008. The largest number of titles returned in a month was 465 in February – which, out of 538, is a testament to the staff who selected the titles in the first place. So overall the usage was deemed successful.

What was not so successful was the purchasing of additional titles for the collection. There had been only 27 since the agreement began. The

main reason for this was the need to purchase two copies. This has meant that either an institution has to buy two copies itself or two institutions have to buy one each. The process for seeking another institution's interest is simply an email to the steering group. However, this inevitably builds a delay into the acquisition process and is dependent upon somebody else wanting the same title at exactly the same time, with a budget available. What is much more straightforward – if less altruistic – is to buy one copy for the institution's individual collection. This is perfectly understandable but it does mean that the shared collection has been relatively static.

In addition to reviewing the NetLibrary agreement, possibilities for other e-book developments were also considered. These were investigating shared agreements with other suppliers and widening the consortium's membership to include other sectors such as further education and public libraries. This is at a time when some suppliers are also considering school libraries.⁵ However, it was felt that there had not been sufficient take-up with other suppliers to warrant further investigation and that expansion to other sectors would just make the selection issues worse. However, it will be necessary to come back to these issues in the future.

The preferred option was the possibility of linking all the institutions' individual collections along with the shared collection to create one NetLibrary collection for Wales. This was considered an ambitious target but one worth pursuing. Discussions have taken place with NetLibrary but currently it is highly unlikely that this will be possible.

Therefore, the steering group is considering how to stimulate the purchasing of new titles to the shared collection. One suggestion is for each institution to commit a certain amount on annual basis. In order to prove that this is beneficial there needs to be evidence to show that students from one institution are using titles selected and paid for by another. Another suggestion is to make the joint selection process easier and to encourage institutions to work more closely in partnerships. Other consortiums such as NoWAL⁶ are negotiating framework agreements with suppliers rather than developing shared collections.

It is planned to hold a seminar for WHELP members, not to only explore the specific issues raised by the shared collection but also to begin to assess how both e-books and collaborative purchasing

are impacting upon institutional collection-development policies.

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