**Knowledge without boundaries**

## EIFL-Consortium Management

www.eifl.net

## What is a library consortium?

A library consortium is a group of libraries that work together to achieve common goals. Consortia provide library users through their member libraries with cost-effective, essential electronic collections and services.

As a proven model in countries around the globe, consortia enable libraries to provide services that they could not provide on their own, and to share expertise and best practice amongst its members.

## Consortium benefits

- Reduction in the cost of e-resources
- Ability to negotiate favourable terms and conditions of use
- Expansion of services and resources
- Sharing of staff skills and expertise to strengthen library leadership
- Increased effectiveness of advocacy for policy change
- Promotes cost effective, customer driven services

## Characteristics of successful consortia

- Committed membership
- Consensus on programs to provide
- Cost effective
- Sustainable funding
- Adequately staffed
- Effective governance structure and processes
- Good communications

## Challenges of creating a consortia

- Libraries may fear losing some of their autonomy or flexibility
- Decision-making may be slower
- Individual libraries may have to do more work on behalf of the consortium
- Not all members may be willing to contribute equally in terms of time or funding

## Ensuring consortia add value

**The consortium should**

- Increase cooperation among members
- Reduce redundant efforts
- Build upon and expand the core competencies of members
- Decrease costs as more libraries participate
- Have costs for membership that are reasonable, predictable and sustainable

## EIFL partner country consortia examples

## LMBA

**Lithuanian research library consortium**

http://www.lmba.lt/

- Established in 2001, 23 libraries
- In 2011, 46 libraries
- Governing structure
  - The General Stakeholders Meeting; 2 x a year
  - Elected President and the Board (7 members)

## LMBA Funding

- Membership fees (joining fee ~ € 72; annual membership fee ~ € 128 + database processing fee 10-30%)
- Grants for databases (government: Ministry of Culture and Ministry of Education and Science – partial funding)
- Projects (EIFL, OSI, British Council Lithuania, Ministry of Culture, the EU-funded project "*Opening of research databases for Lithuania*")

## LMBA Staff

- Regular staff
  - Head of administration (part-time)
  - Databases administrator (full-time); vacant during the EU project
  - Book-keeper (part-time)
  - Manager of public tender procedures (part-time)
- Grant-funded, EU project staff: 9 (4 full-time, 5 part-time)
- Volunteers from the member libraries
- EIFL coordinators (country, OA, IP, FOSS)

## LMBA Activities

- Subscription to databases for Consortium members and other libraries (46 members + 60 public libraries)
- Users training
- Advocacy (©, OA) and information dissemination
- Fund raising
- Knowledge sharing: trainings, consultations, distribution of the information via the internet and mailing list
- International co-operation

Libraries automation and integrated library system are the activities of another consortium (Lithuanian Academic Libraries Consortium for the Maintenance and Development of an Information Infrastructure for Science and Studies)

# LMBA
# Strategic planning

- The Statute of Lithuanian Research Library Consortium
- Strategic activities are
  - Fund raising
  - Subscription to electronic databases
  - Preparation and implementation of advanced technology and innovative projects in the libraries
- Important activities: OA, IP
- Increase membership (there are few college and research institute libraries not yet members)
- Future: continue EU funded project until 2015

# LMBA
# Barriers/drivers

- Key barriers
  - Public procurement procedures (especially via the online procurement system) with foreign suppliers are often complicated and time consuming
  - Costs of databases
- Key success drivers
  - Cooperation with EIFL
  - Motivated and competent team
  - Good relationship with the Ministries, Research Council (we have a good reputation)

# LMBA
# Lessons learned

- Professionalism and high competence
- Good reputation
- Awareness about needs of the members and users
- Services meet the members need and value
- Advertise and promote activities
- Seek for improvement and development
- Good communication
- Sharing the knowledge and experience
- Learning from colleagues

# LMBA: "Together we are the POWER"

- LMBA became a strategic partner in scholarly communication
- Stakeholders trust us, we have very close relations with academic community
- Researchers get much more information
- Librarians learned to work together, react quickly
- We have much more knowledge
- We are active nationally and internationally
- We save member libraries a lot of money

# CARLIGH

Consortium of Academic and Research Libraries in Ghana

http://www.carligh.org/

- Established in 2004, 7 member libraries
- In 2011, 27 member libraries
- Governing structure - 3-tier
  - Appointed advisory Board
  - Governing Board (Representatives from institutions)
  - Elected Management Committee

# CARLIGH
# Funding

- Membership fees: Yes, used for running the Consortium and Workshops
- Funding model: Flat rate for Full members and half rate for Affiliate members

## CARLIGH
## Staff

- Staff: No full time staff now but 4 voluntary workers
- EIFL coordinators integration in consortia activities; report activities to the Chair of the Management Committee who informs the members or directly to members at our meetings

## CARLIGH
## Challenges

- Funding for e-resource subscription and capacity building activities
- Commitment of members & succession planning
- Limited number of subscriptions to databases
- Limited usage of resources
- Much reliance on institutional funding
- Lack of/poor internet connectivity- Polys & COE

## CARLIGH
## Activities

- A secretariat – meeting place
- Voluntary staff –with honorarium
- Services offered
  - access to e-resource
  - capacity building
  - Consultancy services to public for income generation
  - technical and other support to members

## CARLIGH
## Success drivers

- Hard work with no monetary reward
- Accountability and transparency
- Good communication skills
- Partners and linkages

## CARLIGH
## Strategic planning

- Marketing – librarians
- Advocacy – institutional heads & funders
- Fund raising – investments
- Good communication – with members and non-members

## NEICON

National Electronic Information Consortium
http://www.neicon.ru/

- Established in 2002, 113 members
- In 2011, 670 member institutions in 120 cities
- Non-commercial partnership: Board of Founders (5), Executive Director

## NEICON Funding

- No membership fee
- 2 funding sources
  - governmental projects (annually about 2000 site licenses on "free resources")
  - service fee collected for subscriptions
    - 2008: 268 site licenses
    - 2011: 454 site licenses

## NEICON Staff

25 paid staff and 5 unpaid stuff
- Executive director
- 2 deputy directors (resource managers)
- Resource manager (part-time)
- Office IT person
- Library tech support person
- People responsibles for docflow
- Accountants
- Board of 5 experts – unpaid
- EIFL coordinators: country, IP, FOSS, OA

## NEICON Activities

- Negotiations and licensing
- Technical support: all resource administration work
- Accounting: money transfer, reports to fiscal bodies
- Paper work: auctions, tenders
- Fundraising: contacts with Ministries
- Advocacy: users, libraries, university cancellors, Ministry officers and Minister

## NEICON Activities

- Free trainings and conferences: 60 -70 trainings and 2 conferences annually
- Free trials: 20 - 30 annually
- Online client database: registration, applications, expertise, trials, surveys
- Training Center – now suspended
- National Repository – unsuccessful so far
- Online Bibliometrics Module – very slow progress

## NEICON Challenges

In the beginning, there was no money, no authority, no governmental support and no knowledge in e-resources.

We received

- initial support from EIFL and OSI and later on from Ford Foundation
- experience and contacts via former ISF and OSI activities good will and ambitions

## NEICON Challenges

Main problems and obstacles now: **lack of stability**

- changes in political situation: in transition and developing countries, each change in the governing structures leads to changes in politics and values and thus in state programs. We can one day lose governmental support.
- changes in governing structures in the universities.
- changes in economical situation in the country as a whole and in universities in particular

## NEICON Challenges

- Money: to raise own money or/and to get money from funders
- These are two different approaches with different aims and goals and people. Consortium has to choose its way or both ways. We use boths. Similarly to Lithuania…
- To follow both ways you have to have: ideas, knowledge, projects and e-resources themselves.

## NEICON Strategic planning

- We have never had strategic plans, but from time to time we prepare for the Minsitry a concept of future projects for next 3 years
- We write quarterly, annual and final reports on governmental projects that helps us to analyze our activity
- We monitor and analyze business: institutional subscriptions in numbers, turnover and returns
- Membership: currently not focused on expansion, it grows on its own. But in the beginning, we did a lot. Now we are more interested in quality not in quantity.

## NEICON Strategic planning

What we do

- Advocacy for and to many different groups and at different levels.
- Promotional materials.
- Fundraising – Ministry people, RFBR, Academy of Sciences

KEY POINT. Just good and thorough work and knowledgable, competent, reliable, sociable, communicative staff

## NEICON Lessons learned

For a consortium to be alive and successful, it should be

- sustainable
- visible
- recognized
- active

To be alive, a consortium needs money and the right people to work and to guide it. Then everything goes smoothely.

## LELICO

Lesotho Library Consortium

- Established in 2004, 9 member libraries
- In 2011, 14 member libraries
- Active persons are appointed coordinators

## LELICO Funding

- Flat rate annual membership fees
- Government grants a modest annual subvention
- Partners sponsor a number of activities

## LELICO Activities

- Training workshops are successful
- GREENSTONE coordinators have become sub-regional trainers, IP plus FOSS coordinators
- Academics attend OA UNESCO workshop in RSA
- Participate in INASP/Peri programmes

## LELICO Activities

- Made the decision to have Univ Library initially host the Consortium's Repository which is being populated
- The idea of an integrated system has been raised, but implementation is slow
- It's easy to campaign, lobby & get together as a pressure group, eg government subvention, but technical know-how is limited to get several things done

## LELICO Activities

- Joint subscriptions have not been done
- Libraries subscribe individually (this is both a success and not so much a success)
- No common Integrated Library System
- Rate of usage of e-resources has increased

## LELICO Challenges

- Unwillingness of most senior librarians to occupy positions of the Executive committee
- LELICO's duties are voluntary
- Clearly staff are already fully occupied
- Too much reliance on external funding and government subvention
- The present challenge is the likelihood of some libraries who might see no need for LELICO since they subscribe individually

## LELICO Challenges

- Lack of office accommodation
- Lack of permanent staff
- Internet connectivity and ICT capacity at institutional (parent body) & national levels
- Lack of successful model of similar consortium to learn from – at present, at the sub-regional level have different models that are not a good example to benchmark with

## LELICO Challenges

- Despite availability of several Open source solutions now, members have made a choice of one ILS that seems to promote cooperation eg with SABINET (skills & experience to be tapped)
- Aware that majority of members need to build capacity before they can to participate meaningfully in LELICO eg to acquire PCs, automate, get Internet, get started
- Library leaders need confidence-building mechanism, eg practical exposure, on-site training

## LELICO Strategic planning

- Apart from the detailed Strategic Plan 2003-2008 that was not fully implemented, there is none in place
- Strategic plan should consider
  - Expert facilitator and funding
  - What model to follow
  - Involve all, determination and assurance that, unlike the 2003-2008, the plan will be fully implemented

## ELCA

Electronic Library Consortium of Armenia

- Established n 2002  (grant from OSI); 48 members
- In 2011, 44 members
  - Research institutions – 22
  - Public libraries – 16
  - Universities – 6
- ELCA is governed by a Board, consisting of 17 members
- Downloads of EIFL resources: Y2009/7920; Y2010/6821; Ratio of downloads to HE students for Y2010 =0.06

## ECLA Funding

Membership fees

- Institutions annual membership fees (~$200)
- Goal-oriented transfers from State agencies
- Fees are used for
  - EIFL annual membership
  - training
  - subscription to EIFL resources

## ELCA Staff

- 4 paid staff members (director, accountant, technical manager, licensing /from Jan. 2011/).
- EIFL coordinators: IP, OA, FOSS are volunteers

## ELCA Activities: licensing

- 2003, provided access only to EBSCO.
- 2011, provides access to EBSCO, Oxford English Dictionary, Oxford Reference Online, BioOne
- 2009-2011. Ministry of Culture is paid for subscription to EBSCO, INTEGRUM
- 2011. Ministry of Education and Science has paid for one year subscription to Springer. Beneficiaries are; libraries, Universities, research institutions all over Armenia.
- 3 month trail for Science Direct and Scopus.
- ELCA letter to University rectors has sent. Reaction is weak

## ELCA Activities: IP

- Close cooperation with Armenian Intellectual Property Agency (AIPA)
- National Copyright Law will be discussed in the Parliament. AIPA will amend Limitations & Exceptions for libraries based on 'EIFL-IP Draft Law on Copyright Including Model E&L for Libraries and Consumers'
- Armenian IP coordinator has presented 'Copyright for Librarians' curriculum. Training sessions on awareness and advocacy are conducted

## ELCA Activities: FOSS

- KOHA FOSS is in use in American University of Armenia.
- Evergreen, ePrints, Greenstone, Drupal are in use in NAS libraries.
- The library of the Gitelik University will implement OpenBiblio
- Greenstone to be implemented in the resource centre of VivaCell (telecommunication service provider)

## ELCA Activities: OA

- Third Armenian scientific journal 'Proceedings of National Academy of Sciences: Mechanics' is registered in DOAJ (07 Feb. 2011).
- Presentations on OA
- State Linguistic University will implement ePrints (the library director is a 2nd year student in ISEC LIS).
- Failure: absence of Institutional Repositories; (Highest Qualifying Committee is rejecting e-publications as research work for doctoral dissertations.)

## ELCA Challenges

- Lack of visibility of ELCA activities
- Closer cooperation with Universities is needed
- Poor knowledge of English language amongst students, academics, librarians (especially in regions)
- Students are not expected to use e-resources

## ELCA Strategic planning

- ELCA managerial aspects need improvements
  – Create a more active board.
  – Financial reporting must be more transparent.
  – Better promotion of resources, awareness raising, skills development
- Yearly planning for various meetings and trainings
- Activate Web presence with news
  – AUA is maintaining the mailing list of elCA members.
  – ELCA web site is reconstructed.
- Fund raising. Close cooperation with State Agencies

## ELCA Future considerations

- Developing an 'EIFL Local e-Content Network' (something similar with HathiTrust).
- Expert assistance on creating copyright policies for Armenian academic libraries in digital environment
- Introducing mechanisms for developing bibliometric indicators for local content. Similar to 'Scientific Electronic Library Online' &'Publish or Perish'. (SciELO+PoP).

## EULC

Egyptian Universities Libraries Consortium (EULC)

http://www.eul.edu.eg

- Established in 2005, 12 governmental Universities and the American University in Cairo (AUC)
- In 2011, 19 governmental universities besides other academic and educational institutions

## EULC
## Governing structure



## EULC
## Funding

- Government and private funding
- Membership fees (used for central office salaries and activities)

## EULC
## Staff

**9 persons**

- Project coordinator
- Accountant
- Secretary
- License and contract specialist
- Quality Assurance
- Databases & Portal Administrators
- Union Catalogue Coordinator
- Digital repository coordinator
- Digital Library Coordinator

## EULC
## Priority projects

1. **Digital Library Consortia** (The Egyptian University Digital Library) — provides access to the international e-resources including citations, abstracts and full text database; E-journals, books, transactions and engineering standards

2. **The Electronic Theses and Dissertation Database** (The Egyptian Database for Thesis and Dissertation) — The goal is to build a national database for ETDs from the Egyptian universities; a taskforce for ETD metadata standard

3. **Electronic Publication**: An open access initiative for publishing Arabic academic journals through the Egyptian university libraries portal.

## EULC
## Priority projects

4. **Egyptian University Libraries Automation** (The Egyptian Union Catalog for Academic and Research Libraries) — The goal is to automate the Egyptian universities' libraries, (EUL) through building a union catalog.

5. **Future Library System Development** (Future Library Management System)— The ICTC in EL-Mansoura and EL-Zagazig Universities have built and implemented a library automation system. The EULC cooperates with the ICTC. The goals is to standardize the system to cope with the international standards of library automated system and to generalize it in the automation of the EULC.

Learn more : http://www.eulc.edu.eg/

## EULC
## Success drivers

- The position of the Egyptian consortium central office in the main offices of the ministry of higher education gives it a big push and power.

- The activities which the consortium has been implementing are priorities in the universities.

- There was a real need for al the activities executed by the EULC.

## EULC
## Barriers

- Legal procedures for licensing electronic resources which is based on tender procedure requires a lot of paper work.
- This legal procedure impedes/stops the negotiation
- Difficult economic situation during the last few months.
- The lack of decision-making stability and qualified human resources in administration in the last few months.
- Lack of infrastructure in terms of archival data storage and retrieval systems

## EULC
## Strategic planning

- They have a strategic plan for the coming 5 years (in Arabic).
- The plan is part of the master plan of the ministry of higher education and scientific research for information technology and communication.
- It is among the ministry's documents and EULC participated in developing it.

## Thank you

www.eifl.net