

ELECTRONIC PURCHASING IN COLLABORATION – A SHARED INITIATIVE OF NEW ZEALAND LIBRARIES

INTRODUCTION

EPIC (Electronic Purchasing in Collaboration) is the national e-licensing initiative in New Zealand that makes available a package of electronic resources to all New Zealanders through the consortium member libraries.

One hundred and seventy-four libraries have committed to EPIC to date, and the Ministry of Education has funded access for all New Zealand schools for the first two years. As a result of this significant level of collaboration EPIC has provided unprecedented access to electronic resources for New Zealanders.

EPIC operations are funded through an administration component of member libraries' subscriptions. The National Library of New Zealand is currently the lead agency, and hosts the EPIC office. The EPIC Governance Group (EGG), comprising 9 library sector representatives, is responsible for the strategic direction of EPIC. EGG guides the operation of the consortium and works to promote and stimulate expansion of the resources to as wide a NZ library market as possible. There is one full-time EPIC Manager, responsible for supporting EGG and the operational management of EPIC. Her position is funded from the administration fund.

EPIC's vision is to provide access to high quality electronic information for all New Zealanders.

BACKGROUND

In 2002, the National Library surveyed libraries to determine interest in forming a self-funded consortium for the purchase of e-content and to identify the type of content required. A positive response led to the establishment of two multi-sector working groups that developed and made recommendations about possible consortium structure, funding arrangements and content.

To take these recommendations forward the National Library funded a proof of concept project to develop a cross-sector consortium to deliver at least two electronic publications for NZ libraries and their users. This was the PER:NA (Purchasing Electronic Resources: a National Approach) Proof of Concept Project which began in May 2003.

A project manager was seconded from another library and over 60 librarians from across the country were involved in the project working groups. The initial focus was on the development and running of a Request for Proposal (RFP) process that sought to identify and select possible vendors and products.

The following key principles were also emphasised in the project:

- Collaboration - it was an opportunity to demonstrate that the New Zealand library sector can collaborate, in the national interest, through a licensing consortium;
- The model must have the potential to include any New Zealand library
- There should be expanded access to e-Resources for all users
- The consortium should be financially self-sustaining after the set-up phase
- A partnering approach with e-Resource providers



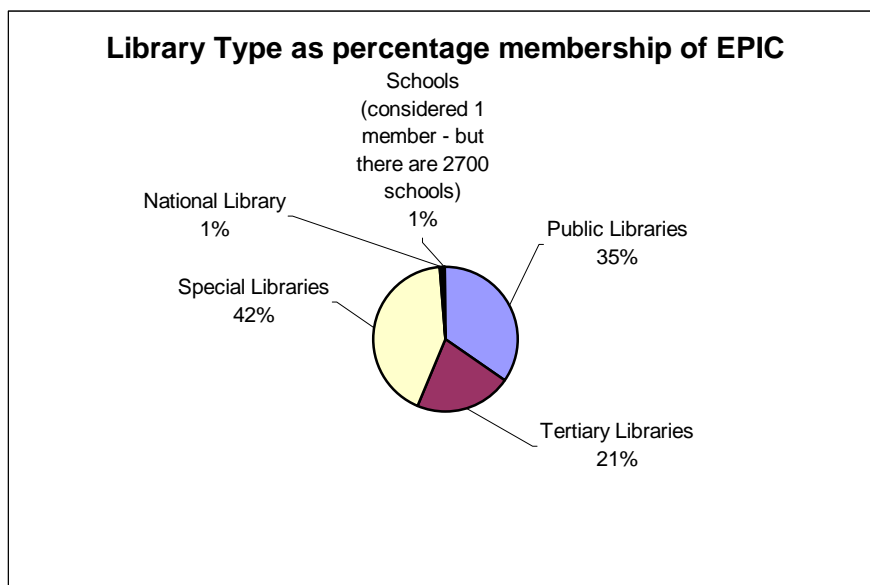
The outcome of the RFP was the selection of a range of EBSCO and Thomson Gale resources (see <http://www.epic.org.nz/nl/eresource.html>). The project team negotiated an ‘all of country’ deal, meaning every person in New Zealand could access the resources through a consortium member library – be it local library, education library, work library or the National Library of New Zealand.

The proposed deal was put to New Zealand libraries in early November 2003 and within a month enough commitment was gained to announce that the consortium could be formed.

EPIC expects a partnering approach between e-resource providers and the Consortium. ‘Partnering’ is a method of operating a contractual relationship to promote prompt, constructive communication and a problem solving approach between the parties. It also includes agreed performance measures and development goals. The use of ‘partnering’ techniques does not in any way imply any fiduciary obligations, partnership or joint venture between the parties. Any contracts include a schedule on an agreed way of working together that promotes prompt constructive communication and a problem solving approach. It requires the delivery of agreed content and service levels and it also enables the setting of future goals and targets.

MEMBERSHIP

Library Type	Percentage of Total in that Sector
Universities, Polytechnics, Wananga, Colleges of Education and other Tertiary institution libraries	95%
Public Libraries (operated by municipal and district authorities)	88% ¹
Special Libraries (includes Company, Charity, Government, Health and other types of libraries)	Approx 30% ²
Schools - The Ministry of Education has provided funding for all registered schools in New Zealand for the first year. Schools must register, and sign licences, before they can access through www.tki.org.nz/epic	Approx 52% ³ registered.



¹ Nine small public libraries have not joined largely due to technology and lack of technology support in their councils.

² There is no definitive information about the actual number of Special Libraries in New Zealand so special libraries percentage may not be accurate.

³ Includes 92% of secondary schools

ACCESS

Each member library manages its own access to the resources so they can customise interfaces and access usage reports as they wish. A wide range of authentication options are supported including IP, Referring URL, ID and Password, barcode pattern, and the use of LibProxy and EZProxy. Libraries are encouraged to set up remote access.

COST ALLOCATION

Aside from the Ministry of Education funding, EPIC is self-funded by its member libraries. A fair and affordable pricing model for all the libraries involved has been drawn up, based on 10 bands ranging from schools and charitable trust libraries at Band A (lowest) to large tertiary libraries on Band I and the National Library at Band J (highest).

Cost allocation depends on a number of factors: for example, population size for the public libraries and collection budget for the special libraries.

The current pricing model includes a contribution towards administrative costs.

BENEFITS

Some of the benefits of EPIC are:

- Nationwide access to electronic resources through all types of libraries
- Affordable subscription costs for most types of libraries
- Libraries that had already subscribed to the EPIC products could now do so for a lower price
- Existing consortia were not negatively affected
- Provision of technical support for libraries
- Increased awareness of the benefits of e-resources by smaller or less well funded libraries
- Higher profile for libraries in general, including at government level
- Greater awareness of the role of libraries and the information resources they make available

CURRENT FOCUS AND THE FUTURE...

EGG is currently focusing on consolidation and growth. This includes the development of a comprehensive training strategy. EGG is also concentrating on new content, funding structures, and strategic relationship building. They are in the process of a second large-scale procurement process seeking new content.

More information on EPIC is available at: <http://www.epic.org.nz/>

Fiona Rigby
EPIC Manager
November 2005