



## **Reciprocal Borrowing across Alma institutions: P2P inter-lending with WHELF**

### **Summary**

1. Since 2018, the Wales Higher Education Libraries Forum (WHELF) has successfully operated a reciprocal borrowing scheme which has delivered cost savings to all partners, maximising resources and building resilience against risks to document supply.
2. The scheme is operated through Alma, with the continuing support of Ex Libris. WHELF is now looking for potential UK and Ireland institutions from the Alma community to join the reciprocal borrowing scheme.
3. Any expanded membership of the scheme will be gradual, to ensure sustainability and adequate resourcing, and based on data which supports mutual benefit.

### **Background**

4. The reciprocal borrowing scheme operates through ISO functionality, which is native to all Alma deployments.
5. Partner institutions do not charge for borrowing; where requests are not met, institutions use other networks, such as BLDS, to satisfy requests.
6. A common policy framework underpins the scheme, supported by analytics on transaction volumes for both borrowing and lending and fulfilment speed.

### **Benefits**

7. Around 20-25% of transactions which would have been routed through BLDS are satisfied from within partner institutions.
8. This generates cost savings for all institutions. Since the scheme moved out of pilot phase in June 2019 more than £30,000 of savings have been made across the 8 participating libraries<sup>1</sup>.
9. Digital and physical fulfilment speeds match or exceed the BLDS SLA.

### **Scheme principles**

10. The scheme is underpinned by the following principles:

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<sup>1</sup> Based on savings compared to BLDS fulfillment, less costs of staff time.

- Delivering benefits – cost savings for all, which are monitored through regular analytics reports
- Equitability – a rota system ensures that no institution receives a disproportionate number of requests
- Flexibility – options for ‘holiday’ periods from the scheme, limiting transactions to digital only or limiting arrangements to specific institutions

## **Governance**

11. Current governance of the scheme is through an oversight group of partner institutions, to which any new partner institutions would be invited. A policy framework and SLA guides the work of the oversight group.

## **Technical set up**

12. Implementing ISO functionality requires minimal resourcing for set up and enables:
  - Digital and/or physical borrowing between institutions
  - Automated workflows or manual intervention from staff
  - Rotas which ensure that the spread of requests is equitable across participating institutions
13. Technical set up and testing usually requires half to one day of staff time and full instructions can be provided.

## **Ex Libris Support**

14. Ex Libris has supported the WHELF scheme and has committed to continued support for the ISO functionality and the borrowing scheme, including where it is expanded to other institutions outside WHELF.
15. Ex Libris recognises that this ISO based scheme is complementary to its RapidILL offering.

## **Next steps**

16. We are holding a webinar at 11am on 11<sup>th</sup> February to describe the scheme in further detail, together with a short demo and an opportunity to ask questions.
17. Any interested Alma institutions within the UK and Ireland are encouraged to contact WHELF to discuss further. Jenny McNally, the WHELF Business Manager, is the primary contact. Please get in touch at [McNallyJ1@cardiff.ac.uk](mailto:McNallyJ1@cardiff.ac.uk) for further information or to register your interest in attending the webinar.