The development of the Finnish knowledge society is a new challenge to the universities, polytechnics and research institutes. The libraries of these institutions have a crucial role in the teaching and learning processes. There are many key factors influencing the development of future knowledge society in Finland. In this, the Finnish National Electronic Library - FinELib has been assigned a crucial role. The target of evaluation was customer services provided by FinELib. In a broad sense, the focal point was electronic information sources, their availability, and use. In this evaluation, the user was understood as a library using the services of FinELib. The publication at hand is the report of an evaluation of FinELib services and cooperation between its stakeholders.

The Finnish Higher Education Evaluation Council - FINHEEC is responsible for conducting different evaluations in higher education. The main principle underlying the evaluations organised by FINHEEC has been to develop the institutions or the organisations concerned, not to rank them, in which the FinELib evaluation is no exception. The evaluation follows the established practices of the Council. One of the principles is that recommendations for development are made independently by the External Evaluation Team. The recommendations concern all parties responsible for ensuring access to electronic materials. In addition to FinELib, the report also contains recommendations to the libraries of the universities, polytechnics and research institutes, as well as to the higher education institutes themselves, and to the Ministry of Education.

The evaluation of FinELib has many concrete results improving conditions for higher education. Self-evaluations and feedback at different levels by the external evaluation may lead to better quality of services in the long run. It will be a key challenge for this kind of an activity.

From the perspective of FinELib, the users are mainly the consortia libraries. From the perspective of the consortium, users are the end-users: teachers, researchers and students - nowadays also increasingly the general public. The decisions made within the national electronic library project will have a direct impact on the effectiveness and efficiency of Finnish higher education. In the European and international contexts, electronic library services and national portals are also important in terms of international competition.

We would like to thank FinELib, all the other libraries and stakeholders involved in the evaluation. We would also like to express our sincere thank to the Steering Group, to the Evaluation Team and especially to its Chair, and to the editors of the report.

We would highly appreciate if the recommendations of the evaluation will be useful and will be adapted in the FinELib consortium, in the institutions concerned, and in the Ministry of Education.

Tapio Huttula
Secretary General

Raija Sollamo
Chair of the Steering Group
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Steering Group

Chair

Sollamo, Raija, Professor, Vice-rector, Helsinki University

Members

Kytömäki, Päivi, Head, Oulu University Library
Laitinen, Sauli, Head of VTT the Information services, Technical Research Centre of Finland
Malm, Kaj, Secretary General, Rectors Conference of Polytechnics – ARENE
Salo, Mika, Member of the Board, Information Affairs, The Union of Finnish Polytechnic Student – SAMOK
Taskinen, Hannu, Project Manager, Helsinki City Library
Tuominen, Ilkka, Secretary of Academic Affairs, Student Union of the University of Helsinki – HYY

FinELib staff

Hormia-Poutanen, Kristiina, Head of National Electronic Library Services, Helsinki University Library, The National Library of Finland

Secretaries

Kangasniemi, Jouni, Senior Adviser, Finnish Higher Education Evaluation Council
Saari, Seppo, Project Manager, Finnish Higher Education Evaluation Council
External Evaluation Team

Chair

Varis, Tapio, Professor, University of Tampere
email: tapio.varis@uta.fi

Members

Collier, Mel, Library Director, Professor, Tilburg University, University of Northumbria
Dörr, Marianne, Director, Hessische Landesbibliothek, Wiesbaden
Fabritius, Hannele, Library Director, Joensuu University Library
von Hertzen, Maria, Head of Polytechnic library – ARCADA
Paavilainen, Elisa, Manager, Information services, Finnish Environment Institute/Data and Information Centre
Vauhkonen, Jussi, Student of Social Sciences, Helsinki University
Summary

FinELib was started as a project, and therefore it has had only a short time to establish its work. Regarding the developmental phase of FinELib, the evaluation took place in a critical time although in a positive sense. The structures of the organisation are still flexible, and the working of FinELib is yet open to discussion.

In addition to the Steering Group the Head of FinELib was involved in the planning of the self-evaluation questions, which might have affected the relevance of the questions. From the perspective of the consortia libraries, the self-evaluation questions consisted a lot of questions concerning their own working, and only a few questions concerning the working of FinELib. The self-evaluations, however, produced information necessary to the Evaluation Team. It is desirable that it has helped also the consortia libraries to develop their own work according to their own strategy and also to become conscious of a national strategy of the knowledge society.

The interviews consisted of groups of 40 interviewees. There were 36 visiting persons in the interview meetings altogether. The number of the interview meetings were ten. The interviews gave a comprehensive description of the situation of FinELib and its stakeholders.

In addition of self-evaluations of FinELib and stakeholders, the findings in the interviews by the Evaluation Team indicated that FinELib had very high quality in its services. In general, FinELib was regarded as an institution and an organisation in a key position in the Knowledge Society progress. Although the work of FinELib was considered very successful, there are, however, some aspects where further development is still needed.

The main part of the evaluation are the recommendations for the Ministry of Education, FinELib, other libraries, and their home institutions. The main areas in the recommendations are strategy, funding of the actions, roles of the stakeholders, need for a portal, size of the packages, usefulness of the statistics, cooperation between FinELib and stakeholders, and customer service. Part of the recommendations address the broad aim of making Finland a knowledge society and discuss the role FinELib may have within this process. To develop such a broader strategy cooperation and work of all partners or institutions under the tutorship of the Ministry of Education needed, this task cannot be assumed by FinELib.
Structure of the Report

The report consists of four main parts. The first part – chapters from two to five – describes the background to the FinELib evaluation, and the context of the evaluation project including also the evaluation process.

The second part – chapter six – mainly consists of the self-evaluation report of FinELib, which is necessary background information for the reader of the report.

The third part comprises the findings of the Evaluation Team – chapters from seven to twelve, and the fourth part – chapter thirteen – the conclusions written by the chair of the Evaluation Team. The report ends – chapter fourteen – with an article written by the chair of the Evaluation Team concerning the knowledge society development and e-learning. The appendices at the end present vital background data.
Introduction

It is widely known that higher education has profoundly changed in the past two decades, and those involved in the academic enterprise have yet to grapple with the implications of these changes. Also research and educational information services have changed. Academic institutions worldwide stem from common historical roots and face common contemporary challenges. While it may not yet be possible to think of higher education as a global system, there is considerable convergence among the world’s universities and higher education systems.

Telecommunicated learning neither respects state lines nor requires any physical presence within a state. National information infrastructures cover a major portion of the cost of expanding telecommunications networks linking educational institutions, health care providers, libraries, museums and government offices and enhance the utilization of those networks, including direct access for the users of the services. The traditional higher education community needs to learn how to compete in this new electronic marketplace.

Technology has made possible the revolution in distance education and new learning solutions that have important implications for the accreditation of educational institutions and assurance of quality in such circumstances. New technology has also made possible the effective information and data services of institutions like FinELib in the fields of technology and medicine with reasonable financial expenses. In some other fields, including the humanities and theology, the situation is different. It seems obvious that effective service in some fields may seem irrelevant in other fields, and servicing the general public through public service libraries may also cater for the specific needs of advanced scientific users.

FinELib was launched to support higher education, learning and research in Finland as part of the Information Society Programme. In the 21st century, the challenge is global knowledge society. In this new century, information and knowledge matter more than ever, and the ability to use them effectively rests on a set of abilities that extend beyond the traditional base of reading, writing and maths. Teachers, students, employees and citizens must now incorporate the new components to enhance their knowledge and critical thinking skills. These include technology literacy, the ability to use new media such as the Internet to access and communicate information effectively and information literacy which means the ability to gather, organize and evaluate information, and to form valid opinions based on the results.

All traditional institutions of higher learning, research and related services like libraries are under the process of change. There are Virtual Universities,
centres and networks of excellence, transnational and transdisciplinary research and learning centres. As a global forum, UNESCO promotes the idea of “Open Educational Resources” initiative as a cooperation mechanism for the open, non-commercial use of educational resources.

The globalisation of society and the rise of a knowledge-based economy have combined in the past decade to impose drastically raised expectations upon higher education institutions and related library services. Governments and corporations look to universities for innovative uses of new information technologies in teaching and administration, while also expecting that universities will make their students sufficiently technology-literate to participate in a global economy. This vision of the new university emphasizes more than before the role of market forces in shaping the institution, the need to respond to users’ needs, and the need to deliver knowledge continuously through distance learning and lifelong learning. However, the vast majority of universities as well as the public and private organizations they work with are unprepared to reorganize themselves to address these new demands.

A true revolution in e-learning requires high-speed access to the World Wide Web, and the flexibility to offer a variety of media. The new services are revolutionising the professional research and educational work when it is possible to retrieve and save articles and other materials, search all kinds of information from images and animation to texts, and receive e-mail alerts and have access to sources not conceivable before.
2

Background and Context of the Evaluation Project

On May 23rd 2001, the Steering Group of the National Electronic Library requested FINHEEC to organise an evaluation of FinELib in 2002. The evaluation was jointly financed by the Ministry of Education and FinELib.

The aim of the evaluation organised by FINHEEC was to evaluate FinELib in terms of the present situation and future challenges, and get feedback for further development of the National Electronic Library.

The FinELib consortium defined the object of the evaluation as follows:

• to find out the use and usefulness of FinELib for teaching, learning and research in Finnish higher education;
• to evaluate how well present activities match the future visions of consortium members;
• to develop the Library according to the evaluation findings;
• to determine the success of the organisational and governmental choices made when FinELib was established on a permanent basis after the initial pilot project phase.


The evaluation project was coordinated by FINHEEC project managers. Senior Adviser Jouni Kangasniemi was the first Project Manager of the evaluation from 02/03/01 to 02/05/15, after which Project Manager Seppo Saari has been responsible for the evaluation process.
Objectives of the Evaluation Project

The objectives of the evaluation were decided by the Steering Group of the evaluation. The purpose of the evaluation was to improve FinELib’s performance by helping its personnel to manage the process of developing, implementing current procedures and services, and piloting new ones. Another aim was to analyse the usability, effectiveness and added value of FinELib services, make current services conscious to FinELib’s stakeholders, contribute to constant development of FinELib, support the development of FinELib’s own quality assurance systems, and provide feedback for future work.

The focus of the evaluation was to assess the relevance of electronic library services to libraries and their owner organisations: universities, polytechnics and research institutes. It was also expected to lay a foundation for efficient and effective electronic library service for Finnish teaching, learning and research more widely.

The evaluation analysed how FinELib services meet the current needs of its consortium members and main stakeholders; how well FinELib services respond to the customers’ current visions and strategies, and how well the diverse needs of FinELib’s customers are being met; how efficient FinELib’s organisational and administrative arrangements are; and how suitable the current funding and steering mechanisms are.
The evaluation method comprised self-evaluations and an external evaluation. In addition to FinELib, altogether 16 stakeholders carried out self-evaluations, fifteen of which were in writing and one orally. The self-evaluation questions for both FinELib and other libraries were planned by the Steering Group in collaboration with the Head of FinELib.

The stakeholders involved in the self-evaluations were determined by the Steering Group. In self-evaluations, each of the stakeholders evaluated their own actions in a written form. At the end of the questionnaire there were questions concerning the services of FinELib.

The Steering Group decided to limit the evaluation themes and exclude all technical solutions from it. Especially the technical facilities of the consortia libraries and end-users were outside the scope of the evaluation. The Steering Group concluded that the technical solutions are the responsibility of the libraries themselves. The technical prerequisites differ according to the library. Also, the end-users are in an unequal position as regards access to materials and the equipment available. The standard of the equipments depends on the infrastructure, which is the responsibility of the institutions. There were no site visits to FinELib or stakeholder libraries. The self-evaluation reports written in English constituted the information source that were complemented with interviews.

The self-evaluation questions were divided into two sections: the description of the subject matter and the evaluation of it. Generally the major evaluation objects were as follows.

**The self-evaluation topics were:**
- evaluation context and framework
- staff profile and staff development
- main services and interaction with the stakeholders
- general user support and guidance
- cooperation and networking
- assessment of services and quality management
- practical arrangements.

**The main questions to the stakeholders related to:**
- the library context and framework;
- the library’s services and central processes
- the staff profile and human resource budgeting in the library
- general user support and guidance in the library
- quality management in the library
- evaluation processes in the library
- FinELib context and framework.
External Evaluation Team

The steering group of the evaluation nominated candidates for the External Evaluation Team, which was appointed by FINHEEC at a meeting on May 30th 2002. The selection of the candidates followed certain principles: the team should represent libraries (universities, polytechnics and research institutes), researchers, both main language groups in Finland, the regions of Finland, foreign digital library experts, and students. The membership of the team embodies all these aspects.

FinELib's self-evaluation was mailed to the External Evaluation Team a month before the interviews. The self-evaluation reports of the stakeholder libraries were mailed to the external evaluators a week before the interviews. The evaluators had therefore only a short time to peruse all the evaluation material. The external evaluation interviews were made from 02/10/10 to 02/10/12.

Before the interviews, the Evaluation Team had an orientation meeting where it discussed the main findings of the self-evaluation reports. At the meeting, the team chose the main themes for the interviews.

The Evaluation Team interviewed FinELib staff, members in FinELib consortium organisation, Ministry of Education, students, and researches (Appendix 5). The interviews lasted for two days. At the end of the interviews, the Evaluation Team gave the FinELib staff verbal feedback concerning their first impressions, observations and tentative suggestions for development. The general impression was very positive and some main findings were discussed with the FinELib staff.

On the third day, the team put forward the main recommendations and conclusions for the evaluation report. After the meetings, the Evaluation Team discussed and prepared the report via e-mail.

Writing and Editing the Report

The Chair of the Evaluation Team, together with the Project Manager, edited the report. Based on the self-evaluation material and personal evaluation reports submitted by the members of the Evaluation Team, the editors compiled
four draft reports of the outcome and conclusions of the evaluation. The drafts were sent via email for comments to the members of the Evaluation Team. The editors of the report had six meetings together.

Before the final version, FinELib has commented the evaluative part of the report.

The contribution of the team has been crucial to the writing of the report. The Evaluation Team represented several views and expertise areas. The cooperation in the team was very constructive.

The External Evaluation group was independent in reporting and responsible for the evaluation part in the report.

Schedule of the writing and publishing process

<table>
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<tr>
<th>2002</th>
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The evaluation report will be published at a seminar for the representatives involved in the evaluation project. The purpose of the seminar is to collect feedback on the evaluation from the perspectives of FinELib and stakeholders.

The Chair of the Steering Group will present the background of FINHEEC and the evaluation project. The Chair of the Evaluation Team will give a lecture on the main findings and recommendations in the evaluation. FinELib representatives will then comment on the results of the evaluation. The stakeholders also have a chance to comment on the evaluation. There will be a possibility for general discussion at the end of the seminar. The seminar will be closed by the Chair of the Steering Group.
6.1 Historical background of the FinELib Programme

Ministry of Education 1995 drew up outlines on information and communication policy for education, training and research into the 21st century. The strategy contained opinions and proposals on how the standard of education and research can be raised by applying information technology.

The aims of the strategy were implemented through the Ministry of Education’s Information Society Programme (1995–1999). Almost FIM 1 billion (EUR 167 million) of earmarked budget funding was used to this end. Most of the appropriations granted for the information society were targeted at equipment acquisition and network building in educational establishments, universities, libraries and archives. As a consequence, the Finnish academic network FUNET is today one of the most powerful data communication networks in the world, universities have fairly good information technology equipment and libraries are being developed as learning centres.

To begin with, the emphasis of the Information Society Programme was on infrastructure. However, it was soon realised that infrastructure is not enough; high-quality content is needed, too. Today the focus is on easy access to appropriate information.

In addition to the Information Society Programme, a Programme for Additional Research Funding was launched for 1997–1999. This Programme raised the level of research funding in Finland to 3.1% of GNP. One part of the funding was allocated to the Ministry of Education. The Ministry nominated a working group of university librarians to plan the Finnish Electronic Library. A report was published in 1997 and the project was started the same year.

The National Electronic Library Programme was started to improve conditions for research, learning and education in Finland. The aim was also to augment the collection of high quality resources throughout the country. There had been severe budget cuts during the early 1990s and the comprehensiveness of the collections was deteriorating.

The main objective of the National Electronic Library Programme is to support higher education, research and learning in Finland. The means chosen to realise this objective are:

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1The Chapter six is mainly based on the self-evaluation report prepared by FinELib. It is available as a whole on the net: http://www.lib.helsinki.fi/finelib.
• to increase the amount of electronic information available to users on the net,
• to improve information retrieval from the net,
• to develop a graphical user interface/portal to give access to heterogeneous information resources.

The purpose of FinELib was outlined by a committee on the national electronic library set up by the Ministry of Education in 1997. The committee published a report in 1997, called The National Electronic Library. The purpose of FinELib has been discussed and defined in more detail since the report was published and the project started. The main objective has, however, been the same since the beginning of the project.

During the period 1997–1999 activities were carried out as a project, but since the beginning of 2000 the programme has been a permanent part of the work of Helsinki University Library, which is also the National Library of Finland. During the first years of operation the principles that guide the activities were formed. These principles cover such topics as licensing policy, share of central funding, selection of resources to be licensed, development activities and co-operation.

The organisation of the Programme was strengthened early in 2001 when a formal FinELib consortium was set up and a Memorandum of Understanding spelling out the procedures of and responsibilities for the FinELib operations was signed. During the first years of operation, 1997–1999, the consortium consisted mainly of universities. In May 2001, the consortium comprised a total of 97 organisations including all Finnish universities, polytechnics and regional libraries as well as several research institutes.

Table 1. Milestones in FinELib development, 1997–2002

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<tr>
<td>FinELib project started 11/1997</td>
<td>1st Plan of Action</td>
<td>FinELib project completed</td>
<td>FinELib established as part of National Library</td>
<td>Renegotiations with financiers on central funding</td>
<td>Cost division model produced</td>
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<tr>
<td>1st steering group meeting</td>
<td>Cost-sharing model adopted</td>
<td>Licensing policy adopted</td>
<td>New steering committee</td>
<td>97 members in FinELib consortia</td>
<td>102 members</td>
</tr>
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<td></td>
<td>Resources-selection model formed</td>
<td>14 licence agreements</td>
<td>26 licence agreements</td>
<td>31 licence agreements</td>
<td></td>
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<tr>
<td></td>
<td>First licence agreements (5)</td>
<td>Formal FinELib consortium formed</td>
<td>Portal under development</td>
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<tr>
<td>Development projects put out to tender</td>
<td>VESA web thesaurus opened</td>
<td>20 licence agreements</td>
<td></td>
<td>EU tender organised to choose portal software</td>
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The number of licence agreements and the number of consortium members has grown significantly. Today there are about 6000 foreign scientific journals, 90 reference databases, law resources, dictionaries and other material that is freely accessible on the Web. The consortium comprises 97 organisations covering all universities in Finland, polytechnics, public libraries and several institutes.

### 6.2 Current Vision and Key Strategies of FinELib

There is no single vision statement, but the FinELib vision is distributed over several documents, the most important ones being the National Electronic Library report and the letter from the Ministry of Education establishing FinELib as part of the National Library.


A plan to cover the next budgetary term 2004–2006 will be written in early 2003.

The vision of FinELib is outlined in the following:

*FinELib, the National Electronic Library, is being developed into a national service with central funding to cover the costs of resources according to a pricing model developed with the consortium, the Ministry of Education and other organisations funding the programme. Central funding also covers staff costs to provide universities, polytechnics, public libraries and research institutes with high-quality services.*

FinELib, the National Electronic Library, is one of the elements forming the infrastructure for research, learning and higher education in Finland. Other elements of the infrastructure consist of the academic network FUNET, supercomputing services and specific science database services offered by CSC (the Finnish IT centre for science), the national citizen identification system, the services provided by the Virtual University and the Virtual Polytechnic. Content on the net is of equal importance to the information technology itself.

FinELib is expanding the usability of electronic resources all over the country. The programme is being developed in cooperation with the consortium and the consortium participates in decision-making.

FinELib increases the international competitiveness of Finnish research. The availability of and easy access to high-quality resources also increases the quality of research and the number of research articles published, and improves the efficiency of research and studying.
A centre of excellence is being formed to provide the consortium with high-quality services. The expertise of the personnel is appreciated not only nationally, but also internationally.

The programme is an active player in international cooperation and contributes to the cooperation of libraries and library consortia. The programme also participates in projects to develop scientific publishing.

### 6.3 FinELib’s Customers and Main Stakeholders

FinELib’s main stakeholders are the FinELib consortium, the Ministry of Education, the major national development programmes, international library consortia, publishers and information providers as well as organisations and projects playing a key role in IT development.

The consortium comprises universities, polytechnics and government-funded research institutes and their libraries, and regional public libraries, 102 organisations altogether. Each library sector has its own organisation for cooperation. The cooperative organs also belong to the stakeholders.

The most important national programmes are the Virtual University and Virtual Polytechnic programmes and the national student identification system at universities and polytechnics. Active cooperation has been developed with all these programmes.

Nordic cooperation has been intensive and useful for FinELib. FinELib has been active in developing Nordic and international cooperation. Even more cooperation is forecast for the future. The international library consortium has grown to be an important channel for influencing the pricing and licensing policies of commercial publishers.

In the electronic environment, cooperation with IT developers is essential. Easy access to electronic resources is a key issue from the user’s point of view. IT development, especially of portal software and linking systems, is crucial for FinELib users. Standard-based development of individual services and the capability to provide FinELib with usage statistics data is also important.

### 6.4 Main Services Provided by FinELib for the Consortium Members and Other Stakeholders

The FinELib consortium’s Memorandum of Understanding describes the responsibilities of FinELib and the consortium members. According to the agreed division of labour, FinELib supports the libraries with certain services and the libraries support the users. The set of services FinELib provides for the consortium is developed to meet the needs of the consortium and according to the resources of FinELib.

The main services FinELib provides for the consortium are:
Licensing (expansions of current agreements, renewals of agreements, licensing of new resources).

Invoicing the consortium members. The publishers invoice FinELib and FinELib divides the cost within the consortium according to the agreed guidelines.

Annual cost estimates/organisation to help budgeting.

Maintenance of IP (Internet Protocol), contact, price information etc.

Coordinating training for library personnel with publishers and information providers.

Organising special courses and seminars for librarians on topics such as licensing, legal aspects of licensing, development of FinELib services etc.

Providing the consortium with promotional materials such as brochures, posters, web pages, training materials.

Running annual user surveys and twice-yearly consortium surveys and organising the evaluation of FinELib to develop the service to meet the needs of users and the consortium in the future.

Collecting usage statistics covering the whole consortium and publishing the information on the web.

Cataloguing the journals licensed to the union catalogue Linda centrally.

Running the portal development project and eventually maintaining the portal application to give users easy access to the resources.

The main services FinELib provides for end-users are:

- Supply of electronic resources on the web (24x7) throughout the country;
- Development of the usability of the resources (portal);
- User surveys to analyse user satisfaction;
- Information about resources and user rights on web pages.

The main services FinELib provides for publishers are:

FinELib is a single negotiating point for publishers. This means savings of time for publishers as they do not need to contact each potential customer individually. FinELib staff and the publishers also use the same “language” when discussing the licences. When the criteria for licence terms and conditions as well as pricing are met, the licence can be signed fairly quickly. FinELib supplies publishers with information about the Finnish library field.

### 6.5 Organisation of the FinELib Programme

FinELib was run as a project from November 1997 to the end of 1999. Since 2000, FinELib has been a permanent activity at the National Library. The Finnish Ministry of Education launched the FinELib project, specified the organisations responsible for its activities and nominated the steering committee. The programme was started in accordance with the Government’s Information Society Programme.
The National Library of Finland was responsible for the practical implementation of the project. CSC, the Finnish IT centre for science was responsible for technical solutions in collaboration with the National Library.

The steering committee at that time consisted of members of universities, university, polytechnic and research institute libraries, CSC, the National Library and the Ministry of Education.

**Permanent activity since 2000**

FinELib became a permanent activity at the National Library in 2000. The consortium members can now participate in the work of FinELib through three different groups, the Steering Group, the Consortium Group and a third group comprising 8 science-specific groups of experts.

The Steering Group consists of representatives of top management of universities and university libraries, polytechnics, research institutes, public libraries, the National Library and the Ministry of Education, plus users’ representatives. The Steering Group is responsible for policy making and drawing up the Plan of Action. The board of the National Library nominates the Steering Group.

The Steering Group has 2–3 meetings annually. More practical issues are discussed in the Consortium Group, whose members are directors of university libraries, polytechnic and research institute libraries, and public libraries. The Consortium Group prepares pricing models, discusses licences, drafts marketing plans and discusses other important practical issues. The consortium Group has 4–5 meetings annually.

The Council for Finnish University Libraries, the Rectors’ Conference of Finnish Polytechnics ARENE, the research institutes and provincial libraries have appointed their own representatives to the Consortium Group.

The expertise of the various academic disciplines and the interests of the end-users and the public libraries are represented more directly in the expert groups, which have been set up for research in the fields of culture, economics, engineering, health science, the humanities, the life sciences and the social sciences. Consequently, there are eight expert groups at the moment, whose main task is to submit proposals for new resources to be licensed.

In the three groups described above, the four sectors forming the consortium (universities, polytechnics, research institutes and public libraries) are all represented.

**6.6 FinELib Financial Resources and Budget Allocation**

FinELib funding consists of central funding from the Ministry of Education and separate funding from the various organisations themselves. Total funding for 2002 will be EUR 9.3 million, one-third of it central funding and two-thirds organisation funding.
The major share of central funding is allocated for universities. The sum has been the same since 1999, EUR 3 million, which covers both central subsidies for resources, development projects and staff costs.

The Ministry of Education also allocates funding for the polytechnics. For 2002, the sum is EUR 275 000. This funding covers staff costs for one planner and some of the costs of the resources.

The public libraries also receive funding from the Ministry of Education. This funding covers some of the staff costs and 50% of the cost of the EBSCO Masterfile for all Finnish public libraries. There will be no funding for the EBSCO Masterfile after 2002.

The research institutes cover all their costs from their own budgets.

Table 2. Budget allocation in 2002

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<th>Central funding</th>
<th>Self funding</th>
<th>Total</th>
<th>Central funding</th>
<th>Self funding</th>
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<td>EUR</td>
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<td>Universities</td>
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</tr>
<tr>
<td>licences</td>
<td>2 400 000</td>
<td>4 300 000</td>
<td>7 300 000</td>
<td>36</td>
<td>64</td>
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<tr>
<td>development</td>
<td>320 000</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>staff</td>
<td>130 000</td>
<td></td>
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<tr>
<td>other</td>
<td>160 000</td>
<td></td>
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</tr>
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<td>Polytechnics</td>
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<tr>
<td>licences</td>
<td>220 000</td>
<td>560 000</td>
<td>560 000</td>
<td>28</td>
<td>72</td>
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<tr>
<td>staff</td>
<td>60 000</td>
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<td>Public Libraries</td>
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<tr>
<td>licences</td>
<td>40 000</td>
<td>180 000</td>
<td>240 000</td>
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<tr>
<td>staff</td>
<td>20 000</td>
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<td>Research institutes</td>
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<td></td>
</tr>
<tr>
<td>licences</td>
<td>830 000</td>
<td>870 000</td>
<td>100</td>
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</tr>
<tr>
<td>staff</td>
<td>40 000</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>9 300 000</td>
<td></td>
<td></td>
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</table>

Funding model for universities:
The programme is based on shared financing. Universities receive a common subsidy of about EUR 3 million, which today is included in the National Library’s annual budget. About 20% of this grant is used to finance joint operations including staff costs and development projects. The main part of the grant, about 80%, is spent on universities’ licences for electronic resources. Licences for universities are not, however, fully covered by central funding. Universities participate in the financing of acquisitions according to a funding model that has been approved by the Finnish Council of University Rectors.

The funding model is based on the Ministry of Education’s centralised funding and commitment from the libraries to the acquisition of electronic material,
by requiring them to provide their own share of the funding. Electronic materials are divided into two groups: general and multi-disciplinary materials, and materials from specific scientific fields. The centralised funding share is different, depending on the type of material involved.

The centralised funding share for general and multi-disciplinary material is a large one. The universities have to fund only a 20% share of the total. For material from specific scientific fields, a 50% share of the funding is required from the universities. This model has been used since 1998 and will continue to be used when renewing the existing licence agreements. Within the central funding budget there is not much flexibility to finance new licences. In the future, libraries will have to be prepared to cover most of the costs of new resources themselves.

Division of costs within the consortium:
In the division of costs within the consortium FinELib has used the model given by the publishers. The consortium has not been satisfied with this solution, however. In early 2002, a special working group was formed of representatives from universities, polytechnics and research institutes. The working group has drawn up a proposal for the consortium, which has been accepted.

The elements forming the basis for new calculations are the number of FTE (Full Time Equivalent) students, the number of researchers and usage. The new model will be used from the beginning of 2003.

One of the first decisions in the project was to apply the licensing principles published by a coalition of Dutch and German libraries in 1997 and later adapted by LIBER. Licensing principles laid down by the international library community form the backbone for the licensing negotiations. These principles are now also well known to publishers, who are mostly well prepared to answer any questions raised during licence negotiations.

### 6.7 Self-Evaluation of the Central Services and Interaction with Stakeholders

How subsidised materials are selected and offered for university and polytechnic libraries, public and research institute libraries:

**Selection**

There is no difference in the selection of subsidised or non-subsidised resources. The 8 science-specific groups propose resources to be licensed. The proposals are made by sector, which means that, for example, universities list resources according to their needs and the other sectors do the same. FinELib summarises the proposals and creates a list of resources to be licensed. The FinELib list of resources is discussed by the consortium group, which decides which resources will be on the agenda for negotiation.
Decisions on which resources are to be subsidised are made differently for universities and polytechnics. On the basis of the funding model, universities have received a subsidy if there have been at least 6 organisations willing to join the agreement for a certain electronic resource. For 2003 there is unfortunately no central funding left to subsidise new resources. When acquiring new resources, universities have to cover the costs entirely from their own budgets.

A cooperative forum for polytechnic libraries decides which resources will receive a 50% subsidy for the polytechnics, but the subsidy does not cover all resources.

**Forming the consortia**

When the selection of resources to be licensed has been made, FinELib begins licence negotiations. During the first contacts with publishers, the licensing policy and the most critical points are highlighted. When an acceptable price proposal is received, the information is put on a password-protected web site. A test on that resource is opened simultaneously with the pricing information.

Forming the consortia takes place in two phases. In the first phase, consortia members inform FinELib of their interest in joining a certain agreement. When the size of the consortium is known, FinELib renegotiates the pricing. The final decision on joining the consortium is made by filling in a form on the web, which contains the final price information. The main terms and conditions of licences are negotiated before asking the consortium for its final decision.

**Mechanisms for different problem-solving situations concerning services**

Major issues related to the aims and policy of FinELib are discussed in the steering committee and the consortium group. Many tools to help everyday tasks have also been developed.

Problem-solving situations can be divided into several categories, namely IT-related, content-related or pricing/licensing-related problems.

**Interaction between commercial suppliers – content providers, publishers**

The primary cooperation between FinELib and the publishers is related to licence negotiations and setting up the services. The main issues in these negotiations are the terms and conditions of the licence agreements and the pricing for the consortium. FinELib has adapted the licensing principles of LIBER and ICOLC and stresses the need for standard-based solutions for the services and the importance of usage statistics.
FinELib cooperates with the publishers over problem solving as well as exchanging information on changes or new features etc. concerning the resources. FinELib is the coordinator between the consortium libraries and the publishers.

The publishers offer training sessions for librarians (train the trainer system) as part of their licence agreements. Training is arranged in cooperation with FinELib. The content of the training follows the requests of FinELib and the libraries.

6.8 General User Support and Guidance

FinELib’s assistance to higher education institutions to develop learning support services

At the national level it is the task of the Ministry of Education to draw up the strategic guidelines for the development of learning and education in Finland. Universities and polytechnics implement the national strategies in practice. The virtual university programme, as well as the universities and polytechnics themselves, runs projects related to the development of learning support services.

FinELib provides the consortium with high-quality electronic resources, emphasises cost effectiveness and develops the accessibility and usability of the resources. The selection of resources in FinELib is based on user needs and user satisfaction is monitored in user surveys. The content available on the net supports both problem-based and project-based learning.

In the licence terms FinELib takes care that the resources can be used in many ways and, for example, course packs can be produced on the material.

FinELib supports consortium libraries and end-users in various ways.

Support services to consortium libraries:

- Day-to-day support via e-mail, telephone (IP problems, other problems related to IT, etc.);
- Support on the web (terms of use, information about resources, statistics, etc.);
- Training courses for librarians on resources;
- Specialist courses for librarians;
- Guide to use FinELib resources;
- Marketing and promotional materials (brochures, posters, PowerPoint slides, web-pages);
- User surveys.

Support services for end-users:

- Portal application implementation and maintenance;
- Information about resources and user rights on web pages.

Consortium libraries support their own users in various ways.
6.9 Cooperation and Networking

Cooperation with other educational/research institutions and organisations – national and international

Cooperation is one of the key elements in FinELib activities and one of the factors lying behind the success of the programme. FinELib’s main cooperation partners are as follows:

**National cooperation:**
- The consortium, 102 organisations;
- The organs responsible for decision-making in different library sectors;
- The Ministry of Education;
- CSC, the Finnish IT centre for science;
- The Virtual University;
- The Virtual Polytechnic;
- TietoEnator, a large IT company involved in the portal project;
- National programmes;
- Others.

**International cooperation:**
- Nordic corresponding programmes/projects
- ICOLC and E-ICOLC
- eIFL
- SPARC / SPARC Europe
- Individual countries (Estonia, Spain, Greece)
- Publishers
- IT developers
- Others.

6.10 FinELib’s Self-Evaluation of Services and Quality Management

Description of the main elements of the current evaluation system

Elements of the current evaluation system consist of annual user surveys, twice-yearly consortium surveys, collection of usage statistics centrally and feedback from consortium members and the Ministry of Education.

**User surveys**

User surveys are run to evaluate user satisfaction and determine how well the service meets user needs. User surveys have been run since 1998 and a lot of data has been collected. Since 2000, the web questionnaire has been connected to a statistics system, which permits additional research on the surveys. An example of the questionnaire is contained in an appendix 5: FinELib User Surveys.
Consortium surveys

Consortium surveys are run to evaluate whether the set of services FinELib provides the consortium with is the correct one and how satisfied consortium member libraries are with the services. The first survey was run in 2001.

Usage statistics

Usage statistics form one important indicator of the importance and impact of the resources licensed. Usage statistics have been collected centrally since 1998. See appendix 2: FinELib Usage Statistics.

Feedback

FinELib staff members and members of consortium libraries meet frequently and there is an open environment for discussion. Feedback is given to FinELib through various channels (e-mail, phone, meetings, seminars).

6.11 Self-Evaluation of the Context and Framework

FinELib evaluated the strengths and weaknesses of its current services and opportunities and threats in the operating environment in the near future.

Table 3. Evaluation of the strengths and weaknesses of FinELib's current services and opportunities and threats in the operating environment in the near future

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>extensive selection of resources</td>
<td>usability of resources (lack of portal)</td>
</tr>
<tr>
<td>strong negotiation power</td>
<td>lack of resources in humanities and social sciences</td>
</tr>
<tr>
<td>centralised decision-making</td>
<td>lack of Finnish resources and mechanisms to</td>
</tr>
<tr>
<td>transparency</td>
<td>encourage domestic publishing</td>
</tr>
<tr>
<td>customer orientation and willingness to develop services</td>
<td></td>
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<tr>
<td>communication</td>
<td></td>
</tr>
<tr>
<td>staff</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>OPPORTUNITIES</th>
<th>THREATS</th>
</tr>
</thead>
<tbody>
<tr>
<td>increased competitiveness of research</td>
<td>changes in funding both centrally and locally</td>
</tr>
<tr>
<td>increased opportunities for product development</td>
<td>reaction to market changes can be slow due to</td>
</tr>
<tr>
<td>new pricing models</td>
<td>consortium structure</td>
</tr>
<tr>
<td>new publishing models</td>
<td>market fluctuations and risks for FinELib and the</td>
</tr>
<tr>
<td>rapid development of IT</td>
<td>consortium are very difficult to foresee</td>
</tr>
<tr>
<td>savings in manpower at libraries</td>
<td>new pricing models</td>
</tr>
<tr>
<td></td>
<td>capability for managing change varies among the stakeholders</td>
</tr>
</tbody>
</table>

| capability for managing change varies among the stakeholders |
General Findings of the External Evaluation

The findings are based on the self-evaluations of the libraries and on the interviews with the stakeholders made by the Evaluation Team.

FinELib is an ambitious activity. It was created to serve the broad aims of the FinELib programme – supporting Finland to transform into an information and a knowledge society, improving the availability of information in electronic form, widening and facilitating access to scientific information for researchers and thus improving the output of Finnish research and improving the economic strength of Finland. FinELib has given new tools for better competitiveness in research and learning. Also the new e-learning and information culture has changed because of FinELib. A vital part of knowledge acquisition is the accessibility of international sources of academic and other information. In improving accessibility the role of FinELib is crucial at the moment.

FinELib has made substantial progress for the Finnish scientific community by delivering e-material like journals and databases, introducing new e-materials, conducting negotiations and making agreements. FinELib has promoted appropriate cooperation structures in order to license the material that is really needed and has informed libraries about this very well. FinELib has also contributed to the new learning culture of the Virtual University by facilitating global access to the research sources and by providing new teaching materials. FinELib has also affected the status of libraries and information services in Finland in a positive way.

FinELib has become an important service centre for libraries and a competence centre in the field of licensing negotiations. FinELib has been successful in its core aim of extending access to published research information throughout Finland. The core task of serving the scientific information retrieval has been conducted very well. FinELib has a good reputation among librarians. FinELib has developed well and is functioning well especially within the hard sciences by providing databases for research and teaching. The situation within other fields like humanities, theology, social sciences and education is less distinct. In these fields combining electronic materials with teaching seems more complicated, partly because there has been no serious attempt to review the needs and expectations of the under-graduate students and their teachers.

FinELib has achieved well in the following goals: widening access to scientific electronic information, becoming a service centre for libraries, becoming a competence centre for negotiating with publishers and content providers, and improving the cooperation and information structures in the Finnish library world. The past six years period has been successful in relation to science and
research but there is a further opportunity to broaden the activities to include citizens through the network of public libraries.

The interviewees were satisfied with the work FinELib has done although improvements and further development still are expected. Until now the emphasis has been more on technical advancement creating new solutions and options for the end-users and partner libraries rather than on contributing to the knowledge society in the broadest sense.

### 7.1 Strategy

Finland has a general national strategy for the knowledge society, but the role of FinELib in it has yet to be defined. FinELib serves already the public libraries to some extent, but the role of FinELib is not precise enough. Although at the beginning the FinELib project did not have an explicit strategy it has worked well. But now there is a need for a further longer term strategy and vision. Within the strategic planning framework of FinELib and the National Library of Finland, a medium term strategic plan should be developed. This would include goal setting, analysis of opportunities and challenges, resource requirements, and human resource development, all in the context of national policies for the knowledge society, learning and developments in the global information industry. The network of Finnish university libraries is the major provider of essential information resources and information services for research and learning. The roles and responsibilities of FinELib and the libraries themselves need to be clarified within this planning framework.

The process of strategic planning within the National Library structures appears to be clear enough, as indicated in the self-evaluation:

The Library is responsible for all its core functions and the decisions concerning them. FinELib prepares the strategy (harmonised with other middle managers and administration) and FinELib’s steering/guidance group will submit it.

Naturally, the libraries themselves have different missions and, as far as we know, there are no strategies for e-learning. Future aims should be defined by the Ministry of Education in cooperation with the steering committee of FinELib, other stakeholders and experts in order to establish a strategic plan for the next five years.

### 7.2 Funding

The existing funding model contains inconsistencies and universities, polytechnics and research institutes are all concerned about the funding. The dual model of the financing by the Ministry of Education is a problem from the perspective of the customer libraries.

The self-evaluation reports indicated that every library institution is worried about the future funding. Therefore funding arrangements should be more
distinct by clarifying and confirming central funding. University libraries in particular agree that they cannot continue without central funding. All libraries would prefer transparency in the budget of FinELib. To improve this, more time for negotiations and more resources will be required. The Ministry of Education is in a crucial position in making solutions about the central funding. The e-library financing requires continual central finance and the customer libraries should know how FinELib fits into the funding framework. E-journals need stable bases of funding, but in the existing result-based funding the budget will go up and down.

The total funding package, including development projects and staff costs, has been the same since 1999. The share of ministry funding for FinELib should be increased, especially for licences for electronic resources. Funding for new licences, which is presently excluded, should be included in order to avoid disadvantage to newer members. So far funding has mainly supported natural sciences while humanities have lagged behind. This has happened because of the lack of humanities databases and journals but the situation is rapidly changing. In the future, there will be greater amount of humanities resources available. Fine-tuning the work currently being done and expanding it, will demand further central funding from the Ministry of Education.

### 7.3 Roles

Within the national knowledge society policy division of roles and responsibilities is unclear between FinELib, the National Library of Finland and the Finnish Virtual University. The role of the National Library of Finland and the role of FinELib in the National Library is also unclear to the libraries. Furthermore, the role of the public libraries in the future strategy of FinELib is not properly addressed. If FinELib will assume other roles – for the citizen in general – it would require more resources and these new roles ought to be made known. The librarians may think that FinELib is known by all people, but the end-users are really unaware of the role of FinELib in the process.

One of the basic questions is who is the customer of FinELib – the library or the end-user. The stakeholders regard the library as a primary customer of FinELib. The relationship between FinELib – library – end-user ought to be clarified. FinELib should focus on libraries and offer services and information to them, not to the end-users. Depending on the development of the Virtual University – and depending on the role FinELib will assume for the Virtual University, FinELib may in the future in this context also offer services directly to the end-users without any intervention from the libraries, but this is not the case now. This is not to say that feedback and analysis of user needs are unimportant. Researchers are very good partners in evaluating the scientific information. Analysis of the current needs of undergraduate students is needed, too. But the current needs of the under-graduate students are the primary concern
of the libraries and a vast majority of these needs are at the moment not in the e-field. This fact has to be kept in mind when planning the future. A conclusion to be made of this is to focus on the usability of e-materials in teaching.

It is also unclear how well the rectors, professors, teachers, researchers and students are aware of FinELib. In order to build up its public profile, FinELib should initiate PR-campaigns together with the libraries in order to promote the use of electronic information by students and researchers. For the end-user it is not important to know about the organisation, the staff etc. of FinELib, but he or she should know that there is a lot of electronic information which he or she can access via his university or polytechnic library, and that part of the costs of these e-materials are sponsored with central means by the government via the programme.

For their part, the libraries need to work out how to combine FinELib with their everyday services, e.g. combining library services and teaching. Library policy must bring together FinELib services, their own services and institutional policy in order to provide coherent relevant services.

7.4 Portal

The FinELib portal is urgently needed. It will solve many practical problems provided that a wide access to the portal is guaranteed, including the polytechnics and the research institutes. Also public libraries should be able to use the portal if Finland is going to develop towards a real knowledge society. Enough resources must be provided for creating and maintaining the portal.

The National Library of Finland has a view how to guarantee that the future FinELib portal will meet the user needs and requirements:

There is a general plan how to develop the national portal and the user needs are guaranteed by a steering group, directors of the libraries, co-operation with the local and partner libraries. The users will have a freedom to personalise it. So in a way there will be not a portal but many FinELib portals that guarantee the development and diversity. Naturally FinELib carefully listens to the consortia.

Easy access and optimal usability of scientific databases are needed in order to ensure equality in access between citizens. More flexible use and access from home are necessary in the near future. In the interviews with the consortia libraries, it was mentioned many times that metadata is needed by the libraries. Metadata refers to any data used to aid the identification, description and location of networked electronic resources. There are different metadata formats ranging from simple to complex and rich in their description.

There is an emerging concept of the European Academic Area which requires deeper and more effective research services. The gap between the scientific world and the people at large is growing. More investment in access to knowledge is needed. Research plays a central role in the implementation of public policy and is also at the heart of the policy-making process.
7.5 Packages

The packages provided by FinELib are mainly multidisciplinary and they cover broad areas. It is recognised that many libraries welcome the wider coverage that the big deals offer but some libraries consider that some of the packages have been too big and contain material that is not relevant for all the libraries in the same consortium. Some of the customer libraries have more or less been forced to buy e-journals that are not needed, since they are included in a certain package. This is probably more of a problem for smaller libraries with smaller budgets, as they cannot afford to spend money on items outside the core subject. With a better representation model of the libraries and more initiatives of the expert groups there might be a better response concerning database testing, content in general and package size.

Evaluation of content therefore needs to be more focused and libraries evaluating the packages on offer need to have more time. Finding the balance between major deals and satisfying minority interests will be an important issue for the future. FinELib should continue the work on major deals that deliver content on a large scale but also concentrate on minority interests even if this will consume both time and money.

Content in the disciplines of social sciences, theology and humanities is very limited. However this is mainly because e-publishing in those areas is not so profitable and therefore underdeveloped. Feedback also suggests that applied science is not well covered although it is not clear whether this is because of non-availability or because of FinELib selection policy. It has also been suggested that FinELib materials are too biased towards pure science and fundamental research, which is less appropriate for use in undergraduate learning programmes and for the vocational programmes in polytechnics. Again, this may be more to do with the market than with selection policy, but it is an important issue for some member libraries and needs to be specifically addressed in future policy development.

7.6 Statistics

FinELib already made useful efforts to get feedback from users through surveys, but existing methods of collecting user statistics would benefit from review and re-design by professional experts. Questionnaire design needs specialised attention to formulation of questions so that they are clear, unambiguous and obtain the intended information.

The customer feedback to FinELib and statistics give a positive picture but there is also a need to develop the system of feedback to member libraries. The libraries would very much appreciate getting all information about the FinELib user surveys as well as management and statistical information concerning their own organisations.
7.7 Consortium Libraries

The university, polytechnic, research institute and public libraries are the real customers of FinELib. As the information oriented service centres of their core organisations their task is both to give their end-users access to relevant information and to improve information literacy within their organisations.

University Libraries

FinELib’s role in the national network of Libraries according to the National Library is:

*to strengthen FinELib’s role in serving and developing new services (as the portal) for the whole national library network. It is a demand and natural development to formalise the ad hoc contracts with single libraries. The core task of FinELib is to negotiate user-rights agreements for electronic resources for its member organisations.*

*Helsinki University Library’s role is to develop to a broad customer service organisation which is clearly stated in the new strategy of the National Library. In that context FinELib will have a crucial service role that will be endorsed. New services like the portal will support the whole nation’s information supply. The National Library highlights the scaling of the services to the whole national library network.*

Although university libraries have a good record in co-operation in the provision of academic information, development of access to e-learning materials is in its early days. Analysis of student needs in relation to new learning methods is not well developed, but in this respect Finland is not different from other countries.

The core tasks of universities are research and higher education. All university libraries, the National Library and the National Repository Library belong to the university libraries network, which has a long tradition of co-operation. The guidelines for network activities for the period 2003–2007 are set forth in a strategy document, completed in 2002.

The network of Finnish university libraries is the major provider of essential academic information resources and information services for university research and teaching. It plays a major role in the quality and reputation of research activities, and student performance. University libraries engage in and develop co-operation in order to strengthen the ability of the libraries to produce services directed to the needs of the universities. As a part of the services in the information society, the network ensures the availability of published information to all.

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2 [http://www.lib.helsinki.fi/kirjastoala/neuvosto/Verkoston_strategia.htm](http://www.lib.helsinki.fi/kirjastoala/neuvosto/Verkoston_strategia.htm)
The requirement for information literacy and source criticism abilities is in the increase, as web-based education becomes more common and the virtual university develops. Everyone graduating from a university has to be able to use printed and electronic information sources plus to work within net or web surroundings.

Teaching, education and learning, e-learning included, are considered very important, and these form a large part of the daily work of university libraries. Many of them have initiated the founding of learning centres to help e-learning. University libraries lay emphasis on user education. Information seeking skills modules have been prepared and integrated into studies within certain disciplines3.

The network of Finnish university libraries takes part in the development of the Finnish Virtual University. It can develop as an agent for promoting e-learning as well. See Library and information services in the Virtual University portal 4.

Polytechnic Libraries

Polytechnics are enthusiastic participants in FinELib, but a number of issues are rising as a result of the fact that FinELib was set up in the first instance to serve universities. As FinELib develops into a service with a truly national and inter-sectoral role, the different missions and student needs of Polytechnics will have to be adequately addressed in FinELib programmes.

Content is often too much orientated towards pure science for the Polytechnics. More e-material on applied sciences is needed and also material in the domestic languages Finnish and Swedish. There is a Library strategy for the Polytechnics Libraries5 for the years 1998–2003 and also a strategy paper about the cooperation between the University libraries and the Polytechnic libraries from 19986. In both these strategies the co-operation between the universities and polytechnics is explicitly stressed.

In order to create a real Finnish knowledge society there should be cooperation both between the new FinELib portal, the Finnish Virtual University and the Finnish Virtual Polytechnic. At the end of the year 2001 the Polytechnics libraries released a strategy for the Virtual Polytechnic Library7. In this strategy, the new FinELib portal was also recognised as important.

5 http://lib.stadia.fi/sailtyys/arene/strategia.htm
6 http://www.tokem.fi/kirjasto/amyli/
7 http://www.arene.fi/files/pages/89/Virtuaalistrategia.doc
Co-ordination of these important national initiatives will require effort at a high strategic level. Although FinELib should be involved at the technical and professional level, it may be advantageous for the National Library to represent information sector interests.

Research Institute Libraries

Research Institutes have an official role in national information services, but they do not have equality in central funding, because they belong to many sectorial ministries. The focus of research institute libraries is on research and development projects. The strategy in respect of e-content for research institute libraries appears to be unclear. In addition to research libraries, this group also comprises other special libraries, e.g. archives, museums, agencies and societies. These libraries and information services have very active common network. They have strategies of their own, but not a common strategy. Referring to the knowledge society it is important that these institutes have an equal access to the electronic materials. The small institutes need central funding of packages which are expensive.

For the same reasons mentioned above, subject content and package is a problem for this sector also. Some subject areas have limited representation e.g. humanities. Special libraries would also like to choose only some areas of the packages. Backfiles of the materials are needed. Consortia size, minimum six members, is too high for special libraries. Special libraries require special access and services and in this sense FinELib is not the only e-library. Beside this, special libraries are particularly interested in the portal and it is important for them to participate along with other sectors. The crucial issue concerning the portal will be the expenses because libraries have to pay for their participation. Research institutes are very specialized in high quality research in every country. It is vital to create appropriate coordination between them. There is a common need for additional centralised funding.

Public Libraries

Since no public library directors were interviewed the only source of information is the evaluation done by the Helsinki City Library, which, however, acts as a Central Library for all public libraries in Finland.

The public libraries are quite well organised and they are also planning cooperation with the FinELib-portal if the National Library agrees on this. A report8 was published in Nov. 8th 2002. However, there is no clear policy regarding the citizen rights to information.

The comments by the National Library to the question “How does the National Library try to develop concepts which might better fit the needs of public libraries”, are as follows:

8 Tiedonhaun portti-Suomen kirjastoselvitys 8.11.2002
To endorse the digitisation and purchasing of domestic materials. There should be a special group of collection specialists to advise a new collection strategy to FinELib in that area. The only problem is that the public libraries are not yet at the same service level as university libraries and there are not the same readiness for consortia.

The National Library has to make the choice, whether it is sensible to enlarge their services to the public libraries.

There is a need for an action plan in order to clarify the needs and possibilities of public libraries.

**7.8 Summary of Findings**

1. The development of FinELib has been rapid and enabled customers of FinELib to undertake radical change concerning their electronic information offer and their information services. Speed of change sometimes means that libraries have not received enough information in time about new content to allow them to inform their users and give them time to evaluate it. Consortia libraries would like to have more comprehensive information on which to base their choices and also more management information in order to evaluate usage and performance.

2. FinELib is well advanced and is functioning especially well within the hard sciences by providing databases for research and teaching in these fields. The situation within other fields like humanities, theology, social sciences and education is less well developed, but that reflects the state of the e-content market.

3. The number of libraries needed for forming a consortium can be a barrier to participation by some libraries.

4. FinELib has not achieved the objective in becoming a competence centre for the public libraries and reaching the general public or the citizens. FinELib’s role has not been expanded to the civil society in general.

5. Although development of learning was mentioned as a goal of FinELib, progress in this area has been limited. In this respect, Finland is at the same stage as many other countries. The usability of e-materials in teaching should be considered by the partner libraries in cooperation with FinELib and academic staff.

6. Considering the prominence of the National Strategy for the Information Society, the role of FinELib in this strategy is not clear and FinELib’s objectives are not yet defined. Now it is time to draft a specific strategy for FinELib.
8

Recommendations to the Ministry of Education

Knowledge Society
The Ministry of Education is in a central position with regard to the universities, polytechnics, research institutes, and public libraries. Issues have arisen during this evaluation which show that some sectors are unequally represented and unequally funded in respect of new e-content. The question arises as to how policy should be developed in an integrated way. It could be considered whether the Ministry of Education should encompass an overarching role as a Ministry of Knowledge, for instance. The Ministry of Education could oversee the information society of Finland as a whole and take the responsibility of the funding of the whole area. If Finland aims to become a real knowledge society, then there should be a vision of public broadband access to FinELib material for every citizen. Finland is already in the forefront of these trends. Such a vision would further differentiate the Finnish information society from other countries.

Funding
- The Ministry of Education should continue with central funding. This is the most cost-effective and least bureaucratic method.
- The Ministry of Education should sponsor a study to investigate how minority interests can be supported and at what cost.
- The Ministry of Education should the review the central funding allocation and ensure that there is adequate budget to libraries and to FinELib according to changing needs, changing membership and market conditions.

Strategy
- The Ministry of Education should define the national strategy for the knowledge society and e-learning.
- The Ministry of Education should sponsor a study about how FinELib could develop its strategy in wider areas including access for the general citizen and development of e-learning.
- The Ministry of Education should consult with relevant parties in order to decide, which tasks belong to FinELib and which ones to other departments of National Library. Different approaches may then be necessary for the different sectors.
• The Ministry of Education should coordinate library and information activities that are now divided between different departments and ministries. In particular, research institutes have an official task of offering information services, but they do not have equality of central funding for e-content.

• The Ministry of Education should bring together the stakeholders and projects (Virtual University, Virtual Polytechnic, National Library, Research Institutes and FinELib) and encourage debate by consortium partners.

• The Ministry of Education should sponsor a study on the role of FinELib or library sector on content management and metadata in e-learning.
9

Recommendations to FinELib

After the self-evaluation and interviews the Evaluation Team had a very positive picture about the work FinELib has done. In spite of the fact that some recommendations have been recognised:

**Strategic Objectives**

- FinELib should define together with its consortia members its forward strategy with respect to its broader contribution to the national knowledge strategy e.g. the role in life-long learning and access by citizens. FinELib should develop a strategic plan or what options would best fit in the FinELib competences. Within its own strategy and operational plan, FinELib should set distinct priorities and deadlines.
- FinELib will need to plan how much staff and what specialisations are needed for continuation of current work and also for innovation.
- The roles of FinELib, the National Library and the Finnish Virtual University should be reviewed in order to ensure co-ordination. The implementation of the portal will make this even more important.
- FinELib should clarify roles and responsibilities of stakeholders within its own organisation (FinELib staff – special-groups – local universities and polytechnics – end-users).
- FinELib should review its processes of quality monitoring.

**Flexibility in Packages and Consortia**

- FinELib should work out mechanisms for greater flexibility for packages and consortia. The size of the packages ought to be flexible and the minimum size of consortium smaller than now i.e. six libraries. Content packages should be deeper including backfiles, and more sophisticated content management service is needed.
- FinELib should pay attention to disciplines, like theology, humanities, and social sciences which do not have much e-material. FinELib should consider the development of a content programme for applied sciences for polytechnics.
Cooperation with the customers

- FinELib should work out surveys, statistics and feedback mechanisms that are recognised as valid by all members. This includes development of better monitoring tools improving user statistics and policy control (e.g. comparison with results of other consortia).
- FinELib should give know-how help for libraries in negotiating their own consortia.
- FinELib should improve the communication process during the negotiation processes (more feedback, why something is done and conditions).
- FinELib should in an active way listen to the customers e.g. libraries and also end-users and read seriously user statistics. FinELib should also be receptive to critical comments.
- FinELib should make budgeting more transparent, and deliver more budget information in due time to libraries so that they can do their own budgets.
- FinELib should define by discussion with members responsibilities for end-users relations.
10
Recommendations to the Consortia Libraries

Strategy

• Consortia libraries should develop a strategic plan as part of the strategy of their institution for an information society.
• In these plans consortia libraries ought to define clearly their needs and wishes in relation to e-content and discuss them with FinELib.

Co-operation

• Consortia libraries should commence a debate within the consortia about how to manage inequalities and practical approaches and then work out a coherent plan.
• Consortia libraries should discuss how to co-operate within FinELib. Opportunities exist for the following:
• Training and training materials
• Subject specific groups and teaching materials
• Shared cataloguing and content descriptions
• Expert groups, steering mechanisms and feedback to FinELib.

Customers

• It is the duty of the consortia libraries to define customer relationships, to train their end-users and to promote their interests.
• The feedback from end-users ought to be based on the relevant questions and the feedback system ought to be regular.
Recommendations to the Universities, Polytechnics and Research Institutes

- The role of the universities, polytechnics and research institutes in the emerging global knowledge society should be defined.
- The cooperation between library-staff and academic teachers and researchers should be promoted.
- The problems of the present borderlines and traditions ought to be examined openly.
- The universities, polytechnics and research institutes should understand the importance of their libraries in the new learning culture, and this should affect on their budgets, too.
Part of the recommendations address the broad aim of making Finland a knowledge society and discuss the role FinELib may have within this process. To develop such a broader strategy cooperation and work of all partners or institutions under the tutorship of the Ministry of Education is needed, this task cannot be assumed by FinELib.

Even some of the more concrete problems mentioned cannot be solved by improving the work FinELib is doing. For example, there is lack of electronic information in the field of humanities and in the Finnish language. Because commercial publishers offer inadequate databases in the field of humanities a possibility would be:

a) to initiate more projects of retrospective digitisation (researchers in the humanities do often use and consult older materials – but naturally it is important to make the right choices in cooperation with the scholars).

b) to encourage scholars by offering project financing to create reviewed publication structures for e-publishing in the humanities.

Sometimes problems are multidimensional and database-related, sometimes language related, which go beyond the mandate of FinELib. In order to develop the Finnish vision of the knowledge society and the possibilities for e-learning for all citizens it is desirable to organise a major brainstorming program (seminars, external experts) within the consortium.
Conclusions – Chair of the External Evaluation Team

The present evaluation work of FinELib was an attempt to define the performance of the Finnish National Electronic Library in this process and help it determine the long-term strategy and vision in the rapidly changing eWorld. The problem is not only how best to serve traditional university and polytechnic libraries and research institutions but also how to deal with the whole new learning culture. In Finland the high performance in learning outcomes and general literacy is largely due to the advanced network of public libraries. Not only institutions but the citizens are main users of information and knowledge.

The work of the present Evaluation Team followed the normal procedure of studying the written self-evaluation reports, interviewing all relevant parties, discussing and debating issues, and finalising a joint report. This work itself has been enlightening and inspiring.

The different recommendations to the Ministry of Education, FinELib, and different kinds of libraries are brief but clear. The Ministry of Education could broaden its role to become the Ministry of Knowledge. The challenge of new literacies should be elaborated in a National Media Education Programme also to promote information literacy supported by electronic library services.

In general, institutional and organizational changes always face resistance and the existing library structures may not be an exception. But in the strategy of a national and global knowledge society traditional university and polytechnic libraries should see their role not as working alone but more as part of a larger consortium, in which FinELib has a special role. This is an essential part of the process of creating a new kind of National Virtual University and larger global university structures. The new learning culture implies innovative applications of e-learning and e-services, virtual arrangements and cooperation across institutions and disciplines. At the same time specific needs of different disciplines and problem areas should be effectively met.

There is an urgent need to focus on the digital content services of different disciplines and fields of applications in order to avoid biased e-library services. Learning technology standards are critical because they will help us to answer a number of open issues. Whether it is a question of creating content libraries or learning management systems, accredited standards will reduce the risk of making large investments in learning technologies because systems will be able to work together like never before. Accredited standards assure that the investment in time and intellectual capital can move from one system to the next.

There is now a need for common European virtual education and common European degree system. The content of a European virtual university gateway
service would be a portal to net-based or net-supported courses and programmes, information search, collaboration and exchange, common denominators, ownership and endorsement label. The quality issues include transparency, benchmarking, meta-data structure, user and peer reviews, sharing of models and best practise, sharing system and tool description, and user experiences.

Virtual education in Europe has so far been mainly taking place at national level and there is not much transnational collaboration yet. National consortia with centres of expertise has been formed in many countries, like in Finland, while some single e-universities and project-based national initiatives also exist. Public-private partnerships are also evolving, and there are new providers of content from corporate and media linked sources. The issues of quality assurance and accreditation as well as international strategic alliances are widely discussed.

The role of the FinELib is central to this process. It can be seen as part of a world-wide initiative to create a telecommunications infrastructure for access to educational resources across national and cultural boundaries. Learners, students and their professors from participating institutions will form a global forum for exchange of ideas and information and for conducting collaborative research and development.
The “World Declaration on Higher Education for the Twenty-first Century: Vision and action”, adopted in the UNESCO World Conference on Higher Education in 1998 (ED-98/CONF.202/3, UNESCO, Paris 1998) recognises that there is an unprecedented demand for and a great diversification in higher education, as well as an increased awareness of its vital importance for socio-cultural and economic development. Higher education includes all types of studies, training or training for research at the post-secondary level, provided by universities or other educational establishments that are approved as institutions of higher education by the competent State authorities.

The UNESCO 1998 Declaration gives three characteristics for qualitative evaluation:

• Quality of higher education is a multidimensional concept, which should embrace all its functions, and activities: teaching and academic programmes, research and scholarship, staffing, students, buildings, facilities, equipment, services to the community and the academic environment. Internal self-evaluation and external review, conducted openly by independent specialists, if possible with international expertise, are vital for enhancing quality. Independent national bodies should be established and comparative standards of quality, recognized at international level, should be defined. Due attention should be paid to specific institutional, national and regional contexts in order to take into account diversity and to avoid uniformity. Stakeholders should be an integral part of the institutional evaluation process.

• Quality also requires that higher education should be characterised by its international dimension: exchange of knowledge, interactive networking, mobility of teachers and students, and international research projects, while taking into account the national cultural values and circumstances.

• To attain and sustain national, regional or international quality, certain components are particularly relevant, notably careful selection of staff and continuous staff development, in particular through the promotion of appropriate programmes for academic staff development, including teaching/learning methodology and mobility between countries, between higher education institutions, and between higher education institutions and the world.
of work, as well as student mobility within and between countries. The new information technologies are an important tool in this process, owing to their impact on the acquisition of knowledge and know-how.

The UNESCO Declaration also addresses the potential and the challenge of technology. It notes that the rapid breakthroughs in new information and communication technologies will further change the way knowledge is developed, acquired and delivered. Among the recommendations to ensure quality and maintain high standards for education practices and outcomes in a spirit of openness, equity and international co-operation it realises that institutions of higher education are using information and communication technologies in order to modernise their work, and that it is not information and communication technologies that are transforming institutions of higher education from real to virtual institutions.

Globalisation is consolidated by the extraordinary invasion of higher education by new technologies, especially the Internet. The development of communication and information technologies makes it possible for distance teaching institutions to strengthen their position in the educational landscape. They also pave the way for lifelong education for all and at the same time are spreading the traditional universities, more and more of which use distance teaching methods in their activities, thereby making the distinction between the two types of institutions virtually meaningless. There are an increasing number of university networks of this kind all over the world, and the use of computers in the learning process, access to the Internet by students as a vehicle for self-directed learning, educational broadcasting and video-conferencing are all being stepped by.

Higher education has to aim at quality and that internal and external evaluation methods should be more generally applied, thereby enabling it to be accountable to society. Higher education institutions are expected to train citizens capable of thinking clearly and critically, analysing problems, making choices andshouldering their responsibilities. The ethical role of universities is becoming more and more important.

Higher education cannot, however, be visualised any longer in purely national or regional terms. Future graduates have to be in a position to take up the complex challenges of globalisation and rise to the opportunities of the international labour market. The equitable transfer of knowledge and the mobility of students, teachers and researchers, and with also the mobility of learning environments with the e-learning applications are crucial to the future of world peace.

By e-learning we understand best practices for learning in the new economy, implying but not requiring benefits of networking and computers such as anywhere/anytime delivery, learning objects, and personalization. It often includes instructor led training. History shows that revolutionary changes do not take off without widespread adoption of common standards. For electricity, this was the standardisation of voltage and plugs; for railways, the standard gauge
of the tracks; and for the Internet, the common standards of TCP/IP, HTTP, and HTML. Common standards for metadata, learning objects, and learning architecture are mandatory for similar success of the knowledge economy. The work to create such standards for learning objects and related standards has been going on around the world for the past few years.9

Learning technology standards are critical because they will help us to answer the following issue clusters:

- How will we mix and match content from multiple sources?
- How do we develop interchangeable content that can be reused, assembled, and disassembled quickly and easily?
- How do we ensure that we are not trapped by a vendor’s proprietary learning technology?
- How do we ensure that our learning technology investments are wise and risk adverse?

Whether it is the creation of content libraries, or learning management systems, accredited standards will reduce the risk of making large investments in learning technologies because systems will be able to work together like never before. Accredited standards assure that the investment in time and intellectual capital can move from one system to the next.

The European Union has decided to deal with education on a transnational level which has not been done in the past. The European response is e-Europe and e-learning. The European e-learning initiative groups together specific measures within an education-oriented framework (The e-learning Action Plan, EC COM (2001)172 final, Brussels 28.3.2001). The key measures on services and content include an inventory of quality certification systems. Special attention will be paid to recognition of qualifications and validation of knowledge acquired by new methods. Also the development and promotion of standards adapted to education and training, and the definition of metadata, taking into account needs that are linked to maintaining quality and to collaborative learning processes, are given priority. Matters concerning intellectual property rights and conditions governing payment of authors will also be examined with a view to developing economic conditions conducive to content development and distribution, especially where teachers and trainers are involved in defining future content and services.

The methods to reinforce the European education and training networks include the development of the PROMETEUS partnership, a discussion forum for matters of common interest concerning the use of educational and training services, based on information and communication technologies, and concerning multimedia access to education and training in Europe.

Telematics, knowledge content, and multimedia-based tools are widely considered central ingredients for evolving new ways to provide learning and train-

9 http://www.learnativity.com/standards/html, 10 July 2001
ing. PROMETEUS is a permanently open forum which seeks to build, express, and voice consensus views on relevant issues that may be presented for its consideration. In particular, it deals with the following issues:

- Optimal strategies for multicultural, multilingual learning solutions,
- New instructional and training approaches and new learning environments,
- Affordable solutions and platforms based on open standards and best practices,
- Publicly accessible and interoperable knowledge repositories.

The consensus building actions will seek to bridge the gap between research and actual use of learning technologies, content, and services.

When opening the World Forum of Unesco Chairs on the 13th November, 2002, Mr. Koichiro Matsuura, Director-General of Unesco, emphasized the need to make educational materials freely available on the web and the real possibilities to do so. As a result, the Open Educational Resources initiative has been launched as a cooperation mechanism for open, non-commercial use of educational resources.

However, the successful implementation of these new learning possibilities requires new literacies and e-learning competencies which are central challenges both world-wide and regionally. In Europe the goal of achieving an e-Europe and social justice and avoiding the digital divide demand that the challenge be met by working to ensure that all sectors of the European society are able to benefit from the employment, educational and development opportunities offered by information and communication technologies.

Definitions of literacy relate, at their core, to an individual’s ability to understand printed text and to communicate through print. Most contemporary definitions portray literacy in relative rather than absolute terms. They assume that there is no single level of skill or knowledge that qualifies someone as literate, but rather that there are multiple levels and kinds of literacy. In order to have bearing on real-life situations, definitions of literacy must be sensitive to skills needed in out-of-school contexts, as well as to school-based competency requirements. Media literacy is multidimensional while digital literacy may refer to the ability to understand and use information in multiple formats from a wide range of sources when it is presented via computers. Digital literacy can simply be a new way of thinking.
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http://www.lib.helsinki.fi/kirjastoala/neuvosto/Verkoston_strategia.htm
http://www.tokem.fi/kirjasto/amyli/
http://www.uku.fi/kirjasto/TieDot/, Akateemiset verkkotaidot.
Tiedonhaun portti – Suomen kirjastoselvitys 8.11.2002

**Self-evaluation reports**

EVTEK – Espoo–Vantaa Institute of Technology Library
FinELib
Finnish Institute of Occupational Health – not written
Helsinki City Library
Helsinki University Libraries
Helsinki University Library, The National Library of Finland
Jyväskylä University Library
Lappeenranta University of Technology Library
Seinäjoki Polytechnic Library
STAKES – National Research and Development Centre for Welfare and Health Library
Swedish Polytechnic Library
Swedish School of Economics and Business Administration Library
Tampere Polytechnic Library
Tampere University Library
The Tritonia Academic Library, Vaasa
Turku Polytechnic Library
University of Art and Design Helsinki – UIAH Library
Appendix 1:
FinELib Evaluation Seminar 14.6.2002

Auditorium at Helsinki University Library

Programme

13.00–13.15 Presentation of Finnish Higher Education Evaluation Council
Project Manager Seppo Saari

13.15–13.40 Presentation of FinELib
Head of Services Kristiina Hormia-Poutanen, FinELib

13.40–13.55 The objectives of the evaluation
Chair of the Steering group, Professor, Vice Rector Raija Sollamo

13.55–14.15 Coffee break

14.15–15.15 Working Groups of Themes — the focus in self-evaluation
Groups are composed from wide range of different libraries

15.15–16.00 Panel discussion — implement the process of self-evaluation in libraries

The seminar is planned for the consortia libraries and the Steering Group.

Participants

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<th>Vacations</th>
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<tr>
<td>Anttonen, Marja</td>
<td>johtava informaatikko</td>
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<td>Frilander, Ulla-Maija</td>
<td>hankintapäällikkö</td>
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## APPENDIX 2:
Libraries and the Staff Responsible for the Self-Evaluation

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<td><strong>EVTEK — Espoo-Vantaa Institute of Technology</strong></td>
<td>Kivikoski, Kaija, Information Specialist</td>
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<td>Sinikara, Kaisa, Director of Information and Library Services Development, University of Helsinki, Central Administration</td>
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APPENDIX 3:
Guidelines for Self-Evaluation – FinELib

THE NATIONAL ELECTRONIC LIBRARY PROGRAMME

This document provides guidelines for the writing of self-evaluation report for the evaluation of the National Electronic Library Programme (FinELib). The use of these guidelines is encouraged where relevant. The respondents will be asked to justify alternative or competing choices, if alternative structure or description is used.

The purpose of the evaluation is to:
• improve FinELib’s performance by helping its personnel to manage the process of developing, piloting and implementing on-going and new procedures and services,
• provide evidence as to the usability, effectiveness and added value of FinELib services,
• make current services visible for FinELib’s stakeholders,
• contribute to the continuous development of FinELib,
• support the development of FinELib’s own quality assurance systems,
• provide feedback for future work.

The focus of the evaluation is to assess the relevance of electronic library services for higher education institutions’, general and research institutes’ libraries and their home organisations. It is also expected to lay the foundations of the efficient and effective electronic library service support for Finnish teaching, learning and research arrangements in a broad context.

The evaluation will analyse:
• how the FinELib services meet the current needs of its consortium members and main stakeholders;
• how well do the FinELibs services cover its customers current visions and strategies;
• how well the diverse needs of FinELib’s customers are being met.
• the efficiency of FinELib’s organisational and administrative arrangements;
• the suitability of current funding (sponsoring) and steering mechanisms;

Different stakeholders are interested in different aspects of FinELib. Often, the views might be different or even competing of what is important, what constitutes good practice and how good practice might be identified and measured. However, all information provided will be useful and studied carefully.

The questions consist of evaluative information about: users (käyttäjäkuva/palvelujen käytön saavutukset), profession (asiantuntijakusa), environment (edellytyskiva) and statistics (volyymiukuva). According to Vartiainen (1994) multidimensional evaluation (monitahoarviointi) provides the best method for evaluating the efficiency and effectiveness of service organisations.

The questionnaire is two-folded: Firstly, it contains descriptive information about the different operations and services of FinELib (questions from 1.1. to 7.3.) and secondly, questions for self-study (questions marked from A to R). All evaluative questions will be used only by the external evaluation team and information provided, will be confidential and not to be distributed without the permission of the respondents.

Thank you for your cooperation.

On behalf of FinELib Evaluation Project, Steering Group

Additional information: seppo.saari@minedu.fi & jouni.kangasniemi@minedu.fi

Finnish Higher Education Evaluation Council, P.O. Box 1425, 00101 HELSINKI, Tel. (09) 1607 6920
DESCRIPTION AND SELF-STUDY – QUESTIONS FOR FinELib

1. CONTEXT AND FRAMEWORK
1.1. Describe the main purpose of the National Electronic Library (FinELib).
1.2. Describe the current vision and central strategies of FinELib.
1.3. Describe shortly, who FinELib’s customers/main stakeholders are (such as university and polytechnic libraries, public libraries, teachers, researchers and students etc.).
1.4. Describe the main services provided by FinELib programme for the Consortium Members or other stakeholders.
1.5. Describe the organisation of FinELib programme
1.6. Description of FinELib’s facilities.
1.7. Describe shortly financial resources and budget allocation of FinELib.
1.8. Write a short historical background of the FinELib programme.
1.9. What major development projects has FinELib funded during the past five years (since 1997)

2. STAFF PROFILE AND DEVELOPMENT OF PERSONNEL
2.1. Staff profile (between 1997–2002)
2.2. Description of FinELib’s staff development (plans vs. implemented?)

3. CENTRAL SERVICES AND INTERACTION WITH STAKEHOLDERS
3.1. Describe how subsidised materials are selected and offered for university and polytechnic libraries, public and research institute libraries
3.2. Mechanisms for different problem solving situations concerning services
3.3. Interaction between commercial suppliers (content providers, publishers)
3.4. Extension of FinELib services beyond the consortium members.
3.5. Describe shortly the main results and impact of FinELib services?

4. GENERAL USER SUPPORT AND GUIDANCE
4.1. FinELib’s assistance to higher education institutions to develop learning support services
4.2. Describe the general support and guidance for FinELib’s main customers (e.g. strategy for support and guidance, support services (e.g. pedagogical: manual, lectures for users, individual support etc., technical: telephone, fax, email, help desk etc.)
4.3. Describe access to electronic services (by students, teachers and researchers)
4.4. Describe the classification/organisation of electronic materials
4.5. Describe the additional information and training services available for the libraries (e.g. Information specialists, electronic courses, special instruction for employees) by FinELib.
4.6. Describe the development of the knowledge network of the university and polytechnic libraries. How new forms of scholarly and scientific communication are enhanced?
4.7. Successful delivery of electronic library services contains common agreement on specific technical standards. Please write a short description of agreed standards or types of projects aiming towards it.
5. CO-OPERATION AND NETWORKING
5.1. Co-operation with other educational/research institutions and organisations (national and international)
5.2. Describe the process of the sharing of information resources and services among libraries (coordination of collection development, non-bibliographic resource sharing, greater leverage of the HE library’s purchasing power, enhancing the inter-library loan processes)
5.3. There are a number of ways in which technical assistance for FinELib may be provided. Please describe the cooperation with the technical suppliers.
5.4. Other than technical interaction between industry and commerce (e.g. advisory groups, projects)
5.5. Describe the process of securing Intellectual Property Rights and Third Party Copyright.

6. ASSESSMENT OF SERVICES AND QUALITY MANAGEMENT
6.1. Briefly describe the main elements of the current evaluation system (If you have any documentation on your evaluation plans, besides what is contained in the project proposal, please attach copies)
6.2. Describe the process of developing criteria which is used in evaluation (e.g. clarity, mutual understanding and development of criteria and assignments)
6.3. The use of customer feedback
6.4. Internal arrangements for monitoring and evaluating strategies.
6.5. Recognition of service requirements for university, polytechnic and public libraries & research institutes.

7. PRACTICAL ARRANGEMENTS
7.1. Organisation and design of the self-assessment process (timetable, methods, names and positions of participating persons)
7.2. Are there any comments you would like to make about these Guidelines or about evaluation of FinELib more generally?
7.3. How do you plan to utilise the results of this evaluation?
APPENDIX 4:  
Guidelines for Self-Evaluation – Stakeholders

THE NATIONAL ELECTRONIC LIBRARY PROGRAMME

This document provides guidelines for the writing of self-evaluation report on the National Electronic Library Programme (FinELib). The use of these guidelines is encouraged where relevant. The respondents will be asked to justify alternative or competing choices, if alternative structure or description is used.

The purpose of the evaluation is related to how evaluation is to be used and who are the intended users of the evaluation’s findings and results. The purpose of the evaluation of FinELib is to:

• improve FinELib’s performance by helping its personnel to manage the process of developing, piloting and implementing different procedures and services,
• provide evidence as to the usability, effectiveness and added value of FinELib services,
• contribute to the overall development of FinELib,
• provide feedback for future work.

The overall goals of the evaluation are described more in detail as follows:

The purpose of this evaluation is to contribute to the long term improvement of FinELib Programme. The focus of the evaluation is to assess the relevance of electronic library services for higher education institution, public and research institute libraries and their ‘home organisations’. It is also expected to lay the foundations of the efficient and effective electronic library service support for Finnish teaching, learning and research arrangements in a broad context.

The evaluation will analyse

• how the FinELib services meet the current needs of its consortium members and main stakeholders;
• how well do FinELib’s services cover its customers’ current visions and strategies;
• the efficiency of FinELib’s organisational and administrative arrangements;
• the suitability of current funding (budgeting) and steering mechanisms;
• how well the diverse needs of FinELib’s customers are being met.

Also, the evaluation provides feedback for continuous development of FinELib’s services, illustrates the current service processes and supports the development of its own quality assurance systems.

The questions set in these guidelines consist of evaluative information about: users (käyttäjäkuva/palvelujen käytön saavutukset), profession (asiantuntijakkuva) and environment (edellytyskuva) and statistics (volyymikuva). According to Vartiainen (1994) multidimensional evaluation (monitahoarviointi) provides the best method for evaluating the efficiency and effectiveness of service organisations.

Stakeholders are interested in different aspects of FinELib. Often, the views might be different or even competing of what is important, what constitutes good practice and how good practice might be identified and measured from the project’s point of view.

This resulting evaluation report consists of a ‘multidimensional’ picture of the present situation in the National Electronic Library Programme and will provide a mirror/a tool for developing further the services of FinELib. In addition to this the report will describe and evaluate the profile of stakeholders and the ability of FinELib to respond to these needs.
The questions marked with numbers (1.1.–9.2.) are mostly descriptive. The questions marked with letters (A to T) are self-evaluative.

All evaluative questions will be used only by the external evaluation team and information provided will be confidential and not to be distributed without the permission of the respondents.

Thank you for your cooperation,

FinELib Evaluation Project, the Steering Group
Additional information: seppo.saari@minedu.fi,
Finnish Higher Education Evaluation Council, P.O. Box 1425, 00101 HELSINKI

Instructions for answering:
Since the libraries differ noticeably from one another, the questions should be applied suitable for each. Please answer the questions in English.

1. CONTEXT AND FRAMEWORK OF YOUR LIBRARY
1.1. Describe shortly the size, amount of units and user statistics of your library that you have collected.
1.2. Describe shortly the future perspectives (2–3 years) of your library (e.g. the future vision and strategic planning)
1.3. Describe shortly the budgeting structure and the financial status of your library. Who decides upon the financing of your library?

2. SERVICES AND CENTRAL PROCESSES OF YOUR LIBRARY
2.1. What are your central services?
2.2. Which are your main customer groups?
2.3. Which part of your customers uses electronic services? How is the data collected?
2.4. What is the relation between the use of electronic and traditional material? How is the data collected?
2.5. In the near future, in what relation will the traditional and electronic materials be developed?
2.6. How does the library divide the budget between traditional and electronic material? What is the policy with it?
2.7. What will the policy be in the future?
2.8. Which part of the electronic materials comes through FinELib (also free-of-charge material)?
2.9. What is the reason for purchasing electronic materials apart from the FinELib supplies?
2.10. Describe the acquisition process of electronic material in your organization.
2.11. How are the services of FinELib mobilized — are there sub-services connected to them?
2.12. In your library, what action is taken to reinforce the use of electronic material?
2.13. How much does your library use electronic services charged on the base of the amount of usage rather than subscription, and how will this kind of usage develop in the future?
Evaluation:
A) Evaluate the main results and impact of your work in the field of electronic services (i.e. consultation and publication in the internet)?
B) Evaluate the effects of the virtual university and virtual polytechnics to the needs of electronic services and your cooperation with virtual higher education.
C) Evaluate the organisation of funding acquisition in your library.
D) How would you like to improve the resource allocation process in terms of subsiding the purchasing of electronic materials?

3. STAFF PROFILE AND HUMAN RESOURCE BUDGETING IN YOUR LIBRARY

3.1. What is the total amount of your staff?
3.2. Regarding your staff, who takes part in the selection of electronic materials, in the teams and training? How often?
3.3. Regarding your staff, who works mainly for the electronic library. How often?
3.4. Regarding your staff, who works in the usage training of the electronic material? How often?
3.5. How much of the staff time is spent on the electronic material compared to the traditional work?

Evaluation:
E) What is the adequacy of the competence in your staff to give and to develop the electronic services?

4. GENERAL USER SUPPORT AND GUIDANCE IN YOUR LIBRARY

4.1. Describe the general support and guidance for users (e.g. strategy for support and guidance (incl academic guidance), support services (e.g. pedagogical: manual, lectures for users, individual support etc., technical: telephone, fax, email, help desk etc.))
4.2. How have you organized and developed your own electronic services such as group based ‘electronic bookshelves’?
4.3. Describe any additional information management consultation and training services that you offer.

Evaluation:
F) Which library user-support services are most useful/used by
   a. teachers?
   b. students?
   c. researchers?
   d. others?
G) Please, describe and assess the way in which the users may influence the development of support and guidance services concerning the electronic library.
H) Describe and evaluate your cooperation with other libraries in exploitation of electronic material and service innovations connected to it.

5. ASSESSMENT OF SERVICES AND QUALITY MANAGEMENT IN YOUR LIBRARY

5.1. How does your library monitor the use of electronic services?
5.2. How does your library take use of customer feedback (e.g. examples of how the needs of eLibrary users will take account).
6. EVALUATION PROCESS IN YOUR LIBRARY

6.1. Describe the organisation and design of your library’s self-assessment process (timetable, methods, names and positions of participating persons)

6.2. Are there any comments you would like to make about these Guidelines or about evaluation of FinELib more generally?

6.3. How do you plan to utilize the evaluation results?

7. CONTEXT AND FRAMEWORK OF FINELIB

7.1. How do you perceive the purpose and mission of FinELib according to your needs?

   Evaluation:

   I) Evaluate how the principles of FinELib support the needs and goals of your library.
   J) Evaluate the service ability and professionality of FinELib staff in the following matters:
      a. agreements
      b. training
      c. informing
   K) Evaluate how well FinELib informs the final-stage-customer about its services and conditions.
   L) According to your experience, evaluate how your feedback has affected the functioning of FinELib.
   M) Please indicate how you would like to improve the technical solutions within FinELib.
   N) What kind of new services are expected of FinELib?
   O) Other feedback you will to give about FinELib.
APPENDIX 5: Programme of the External Evaluation

FinELib evaluation

Programme 10th, 11th and 12th of October

<table>
<thead>
<tr>
<th>Thursday 10th of October</th>
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<tbody>
<tr>
<td><strong>am.</strong></td>
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<tr>
<td>8.30–9.45</td>
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<tr>
<td>Introduction to evaluation project, Chair, Professor Tapio Varis</td>
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<tr>
<td>— roles of interviewers</td>
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<tr>
<td>— expectations of interviewees</td>
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<tr>
<td>— some principles</td>
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<tr>
<td>9.45–11.30</td>
</tr>
<tr>
<td>Interviewees — FinELib staff</td>
</tr>
<tr>
<td>Kristiina Hormia-Poutanen, Head, FinELib services</td>
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<tr>
<td>Ari Alkio, Planning Officer, FinELib services</td>
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<tr>
<td>Arja Tuuliniemi, Planning Officer, FinELib services</td>
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<tr>
<td>11.30–12.15</td>
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<tr>
<td>Lunch</td>
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<tr>
<td><strong>pm.</strong></td>
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<tr>
<td>12.15–1.45</td>
</tr>
<tr>
<td>Interviewees — Researchers</td>
</tr>
<tr>
<td>Antti Arjava, Docent, Helsinki University</td>
</tr>
<tr>
<td>Mikko Lammi, Senior Research Assistant, Kuopio University</td>
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<tr>
<td>Eero Sormunen, Professor, Tampere University</td>
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<tr>
<td>Kai Öörni, Researcher, Oulu University</td>
</tr>
<tr>
<td>1.45–2.45</td>
</tr>
<tr>
<td>Interviewees — Libraries</td>
</tr>
<tr>
<td>Seija Pohjalainen, Head of Library and Information Services, Tampere Polytechnic Library</td>
</tr>
<tr>
<td>Eila Rämö, Information Specialist, University of Art and Design Helsinki Library</td>
</tr>
<tr>
<td>Iris Tahvanainen, Head of Library and Information Services, Espoo–Vantaa Institute of Technology</td>
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<tr>
<td>2.45–4.30</td>
</tr>
<tr>
<td>Interviewees — combination of users, Libraries and Virtual University</td>
</tr>
<tr>
<td>Anneli Ahnola, Library Development Officer, Tampere University, Library</td>
</tr>
<tr>
<td>Antti Auer, Co-ordinator, Virtual University of Jyväskylä</td>
</tr>
<tr>
<td>Mirja Niemelä, Assistant, University of Art and Design Helsinki</td>
</tr>
<tr>
<td>Miia Suoranta, Student, Helsinki University</td>
</tr>
<tr>
<td>Anu Wulff, Co-ordinator, Learning Centre, University of Kuopio</td>
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<tr>
<td>4.30–5.15</td>
</tr>
<tr>
<td>Collecting the discussions</td>
</tr>
</tbody>
</table>
Friday 11th of October

am.
9.00–10.30 Consortia Libraries
Toni Alhainen, Chief of Department, University of Jyväskylä Library
Ulla-Maija Frilander, Head of Acquisition University of Jyväskylä Library
Pirjo Vatanen, Director, University of Jyväskylä Library
Kaisa Sinikara, Director of Information and Library Services Development, Central Administration, University of Helsinki Library
Päivi Pekkarinen/Sinikka Luokkanen, University of Helsinki Library
Terttu Turunen/Marja Hirn, University of Helsinki Library
/Theodora Oker-Blom, University of Helsinki Library

10.30–12.00 Consortia representatives
Kai Ekholm, Head University of Helsinki Library; Finnish National Library
Kristiina Hormia-Poutanen, Head, FinELib Services
Päivi Kytömäki, Head, University of Oulu Library
first of the previous Chairs of the Steering Group of FinELib
Matti Uusitupa, Rector, University of Kuopio, Chair of the Steering Group of FinELib

pm.
12.00–12.30 Ministry of Education
Sakari Karjalainen, Director Science Policy Division
Barbro Wigell-Ryynänen, Counsellor for library affairs, Culture and Media Division

12.30–1.30 Lunch

1.30–3.00 Libraries /Researchers
Kaija Kivikoski, Information Specialist, Espoo–Vantaa Institute of Technology, Library
Tarja Koskimies, Chief Librarian, Seinäjoki Polytechnic Library
Katri Kärkkäinen, Professor, Finnish Forest Institute
Maria Schröder, Director, Swedish School of Economics and Business Administration Library
Anja Ukkola, Director, Lappeenranta University of Technology Library

3.00–4.00 FinELib
Ari Alkio, Planning Officer, FinELib Services
Kristiina Hormia-Poutanen, Head, FinELib Services
Arja Tuuliniemi, Planning Officer, FinELib Services

4.00–4.30 Evaluators discussion

4.30–5.00 FinELib — First impressions about the evaluation
Ari Alkio, Planning Officer, FinELib Services
Kristiina Hormia-Poutanen, Head, FinELib Services
Arja Tuuliniemi, Planning Officer, FinELib Services

Saturday 12th of October – Evaluation Team’s working day

am.
9.00–12.00 The main results of the evaluation

pm.
12–1.00 Lunch

1.00–3.00 Recommendations to the report
How to continue, deadlines
APPENDIX 6: FinELib Organisation

The National Electronic Library is part of the National Library’s online services for libraries. The Consortium members can participate in the work through three different groups. The Steering Group is responsible for policy making and evaluates annually the results and the economy. The Consortium Group makes proposals about the work to the National Library and the Steering Group. Science-specific groups of experts propose to the National Library the resources to be licensed to the corresponding field of science.
APPENDIX 7:
Major Development Projects FinELib has Funded
— Self-Evaluation of FinELib

PROJECTS FINELIB HAS FUNDED DURING THE PAST FIVE YEARS – SINCE 1997

FinELib has organised two tenders (1998, 2000) to fund development projects related to the purpose of FinELib. As a result of the first tender in 1998 four development projects were funded. These projects are:

**KAKS Project — the standard base for the National Library network**
The KAKS Project created an application guide to the international information retrieval standard Z39.50 and to the interlibrary lending standard ISO ILL to promote the development of interoperability of the National Library network. Special applications tested were the research databases and the subject gateways. The aims were extended to include the development and testing of existing tools.

**Guide to building subject gateways**
Finnish university libraries have been active in creating subject gateways. With FinELib funding a web-based guide on building subject gateways was published to help libraries in this work.

**Guide to help end-users to use FinELib resources**
In collaboration with the Institute of Data Processing, Jyväskylä University Library has created a multimedia course pack on FinELib resources and how to use them. The course pack was aimed at end-users and librarians.

**Language technology projects related to the development of the Nordic Web Index**
A language technology project has been funded to develop information retrieval of web resources.

All these projects have been successfully concluded and guides and reports are available. During 2000 a tender was organised to select an organisation or a consortium to study and analyse which portal software would best meet the needs of the FinELib consortium in giving access to heterogeneous information resources. TietoEnator, a large Finnish IT firm with good knowledge of library standards and protocols was chosen. In 2002, an EU tender was organised to choose a commercial portal application. The selection of the portal application will be made in October 2002 and the portal software should be running in early 2003.

In addition to these projects started through tenders, a couple of other projects of smaller scale have been financed:

**Production of a web thesaurus**
A thesaurus compiled of the multidisciplinary thesaurus YSA, the corresponding Swedish language version ALLARS and the music thesaurus CILLA are currently in use as a web database to serve both end-users and librarians. The production of the database software and the implementation of the work was financed by FinELib.

**Guide to electronic publishing**
A survey of publishing practices at Finnish universities was carried out in X. A guide to electronic publishing was written on the basis of the survey to give universities and other research organisations a distinct idea of the different options available.
APPENDIX 8:
Staff Profile and Development of Personnel
– Self-Evaluation of FinELib

Staff profile (1997–2002)

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of staff</th>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1997</td>
<td>1</td>
<td>Project manager</td>
<td></td>
</tr>
<tr>
<td>1998</td>
<td>1.3</td>
<td>Project manager and a part-time planner</td>
<td></td>
</tr>
<tr>
<td>1999</td>
<td>2</td>
<td>Project manager and planner</td>
<td></td>
</tr>
<tr>
<td>2000</td>
<td>3.5</td>
<td>Head of services</td>
<td>Planner, part-time planner, cataloguer</td>
</tr>
<tr>
<td>2001</td>
<td>4</td>
<td>Head of services</td>
<td>2 Planners, cataloguer</td>
</tr>
<tr>
<td>2002</td>
<td>6</td>
<td>Head of services</td>
<td>3 Planners, cataloguer, secretary</td>
</tr>
</tbody>
</table>

The FinELib team has analysed the main skills needed to run FinELib activities successfully through describing various work processes, for example the licensing process and listing the skills needed in various phases. This has proved to be a very efficient training method and a training programme for 2002 and the first half of 2003 has been developed on this basis. Examples of the skills considered to be important are:

- Good knowledge of the libraries network, funding mechanisms for various sectors, cooperative organs among the sectors etc.
- Language skills
- Knowledge of contract law and licensing principles
- Negotiating skills and ability to interact with various stakeholders
- Teamwork skills
- IT skills
- Teaching skills
- Organisational skills

Staff development is considered of the utmost importance and new means of motivating the staff and supporting them in learning are actively being sought.


