

Briefing Paper

SUBJECT	6 month review of BONUS+
FILE REFERENCE	Ref number
DATE	14 th December 2017
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Background

BONUS+ is a resource-sharing initiative of the Library Management System company iii, which enables unmediated borrowing by students and staff of member universities who in the Australasian area can access over 7 million books from participating university libraries. The ANU Library uses iii's Sierra as its in-house library management system therefore ANU Library was eligible to join the BONUS+ consortium for resource sharing with other iii Sierra and Millennium university libraries throughout Australia and New Zealand.

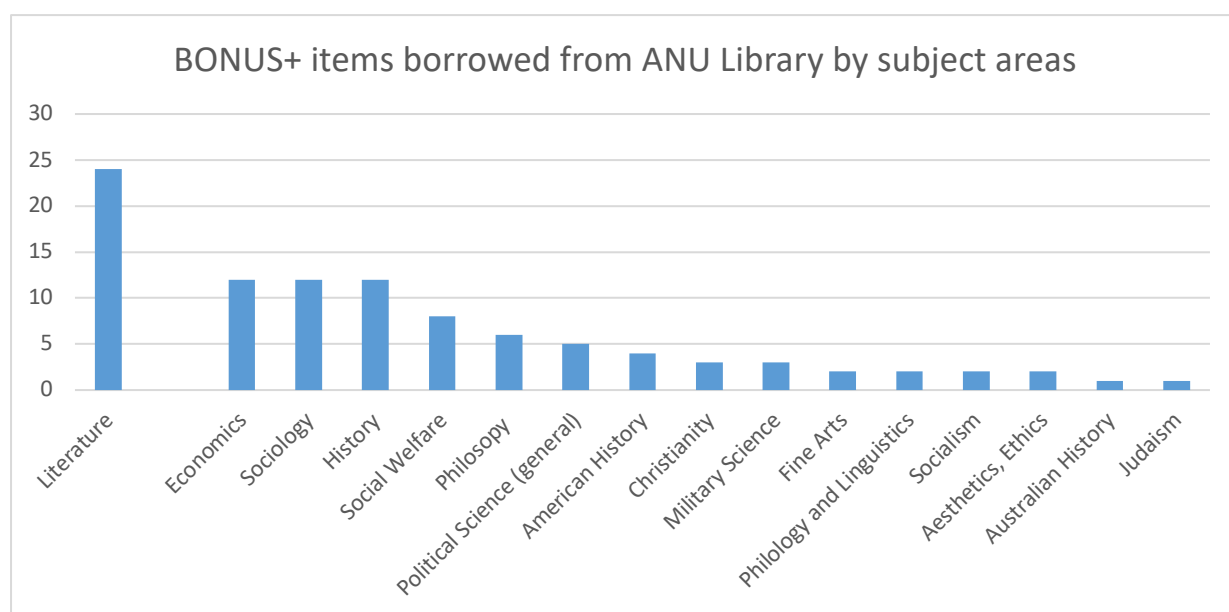
The ANU Library purchased the BONUS+ module in September 2016 and worked towards a December 2016 go live date. Due to various issues (see the Implementation of BONUS+ <http://anulib.anu.edu.au/files/document-collection/Briefing%20PaperBonus%2B%20impelmentation2016.pdf>) this date was not achieved however the ANU Library was live on 11th January 2017 for requests only and from 1st February 2017 for both requests and supply.

The ANU Library set up BONUS+ for the use of academics, researchers and post-graduate students. External students and undergraduates were excluded from the agreement.

The implementation of BONUS+ has provided another tool which allows ANU staff and Post Graduates to access resources for their research, teaching and learning. Traditionally, print resources not held by the ANU Library have been accessed through Document Delivery (Doc Del) services and in 2017 (January to July) through Doc Del services, the ANU Library has received 1,466 loans and supplied 2,879 items to other libraries. During this time BONUS+ supplied an additional access point for ANU staff and Post graduates with the requesting

and delivery to the ANU Library of 633 items. This when viewed alongside the Document Delivery received figure for the first 6 months of 2017 shows that there was a 43% increase in the print resources accessed by ANU staff and Post Graduate students with highly efficient workflows. During this first 6 months of operation with BONUS+, ANU Library provided 2454 print items to other universities, which is an 85% increase when viewed alongside the Doc Del supplied figure.

In depth analysis of discipline areas within the collection of the ANU Library that have been loaned, and the items that ANU staff and Post Graduate students have received will be available in the following report looking at the service in the first 12 months. Looking at a sample of 100 books loaned from that Chifley Library supplied, the most requested subjects were 24% Literature, 12% Finance, accounting and economics, 12% Sociology, 12% General History, 8% Social Welfare and 6% Philosophy.



The ANU Library set up BONUS+ for the use of academics, researchers and post-graduate students. External students and undergraduates were excluded from the agreement.

Vanessa Galloway was appointed as the BONUS+ Coordinator for the ANU Library. The ANU Library has been an active participant in the BONUS+ consortium since going live.

Review of the first 6 months of BONUS+

A meeting was held on 7th September 2017 to provide feedback, both data and perceived responses, concerning how BONUS+ has been received by our users as a service offered by the ANU Library, what has changed within the Library in order to include BONUS+ as an offered services, what needs to change to ensure it is a highly valued and used service, what do we need to think about for the future in order to ensure that BONUS+ delivers an excellent library service, what would help the ANU Library better understand what library users want in terms of access to print resources.

Heather Jenks and Vanessa Galloway had prior to this meeting sent out emails to ANU academics and Library staff seeking their thoughts on this new service.

This report analyses these solicited responses and the responses from those who attended the meeting together.

Has BONUS+ increased the Library staff workload?

One areas where the ANU Library expected there to be changes with the introduction of BONUS+ was in the DocDel area. The expectation was that the DocDel statistics would decrease, both in terms of requested items for ANU Library users from other universities and the amount that other universities were requesting from the ANU Library. BONUS+ activity was then expected to expand and reduced the mediated service offered through DocDel. That has not been the result to date.

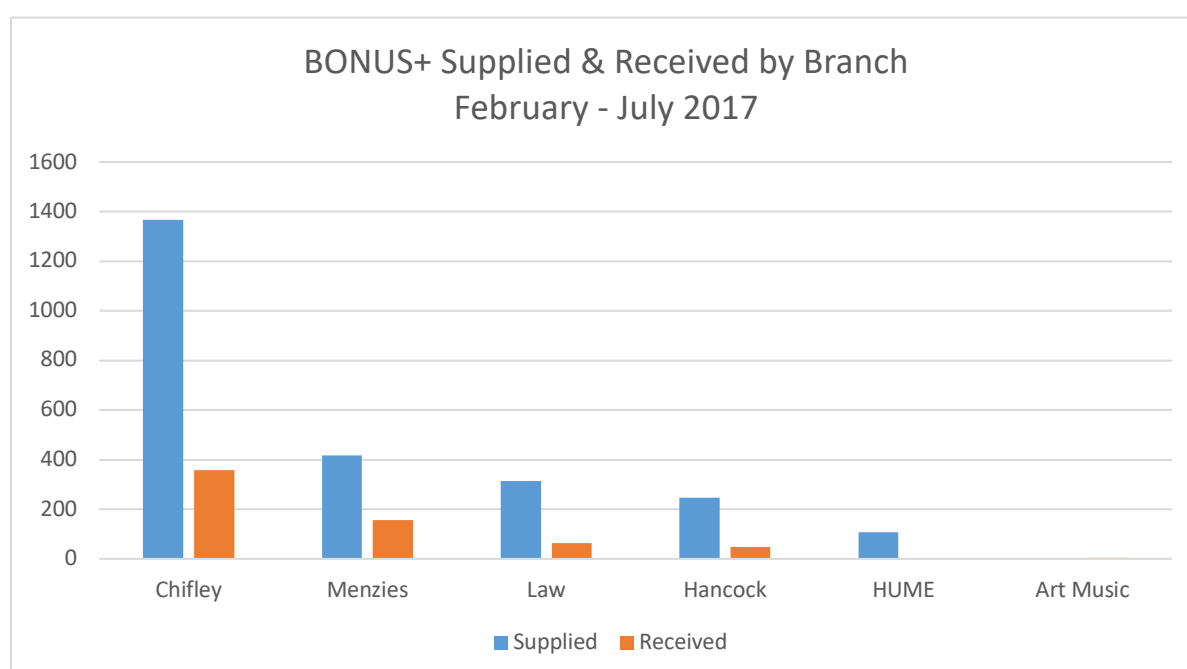
During Feb-July 2017 staff in the branches spent more time processing Inter Library Loan (ILL) requests (including DocDel and BONUS+ requests). The DocDel statistics displayed below for this period show a significant increase in the incoming requests from other universities compared to the same period in 2016.

DocDel Stats: Feb – July 2017

Year	ANU Requests	Other universities from ANU
Feb-July 2016	1,626	1,535
Feb-July 2017	1,466	2,879

In the 6 month period February to July 2017 ANU Library has supplied 2454 items to other consortia members, and has received a total 633 items for our patrons. That is a total of 3,087 books.

Workload in the branches



- Chifley processes 60% of the requests made to ANU (including HUME items)
- Menzies 17%
- Law 13%
- Hancock 10%

Other comments collected included –

- Hancock Library staff noticed a decrease in workloads for Document Delivery
- Other Branches commented that their workloads have increased with the BONUS+ workload (exception Art & Music).
- There has been very little effect on Hume, Chifley is processing the few requests that Hume has received to date, as Hume does not have access to the postal system and processing the items out at Hume then sending them to Chifley would cause a delay in delivery.
- When reporting on workloads the Library also needs to factor in the running of reports, working through these reports and reporting back to the appropriate people in the Branches and the wider Library. Most of this workload falls on Chifley staff, with the BONUS+ Coordinator and the Reserve Officer (branch BONUS+ supervisor) spending on average 8 hours per week following up on problems across ANU branches and the consortia.
 - Noted that when processing the requests; the Circulation Supervisor needs to follow up the expired holds, overdue books etc., for BONUS+ as well as ILL and normal ANU holds.
- The impact in the Law Library was not inconsiderable. DocDel staff based in Law Library processed 9.8% less requests from the ANU students however they also noted that they answered many enquiries about BONUS+ requests. Students obviously don't differentiate between BONUS+ and ILL and they contact DocDel staff with any queries about obtaining print materials held in other libraries.

Overall, Chifley Library has carried the biggest workload across the libraries for BONUS+ to date. This has been offset to some degree by the reduction in loans and therefore in shelving, and the staffing hours that were previously required by these activities. In Chifley Library the number of loans fell -10.4% between 2015 and 2016 and loan statistics to date are showing a further decline for 2017. Anecdotally, staff had thought that Hume collections would be drawn upon by other borrowing libraries, however that has not been the case. Historical material is not being heavily requested, in fact one area of concern has been the number of requests made to the Law Library for their newly acquired and newly published text book materials.

Chifley statistics

Chifley BONUS+	FEB	MAR	APR	MAY	JUN	JUL	TOTAL
Supplied requests – non-ANU	189	274	228	299	164	213	1367*

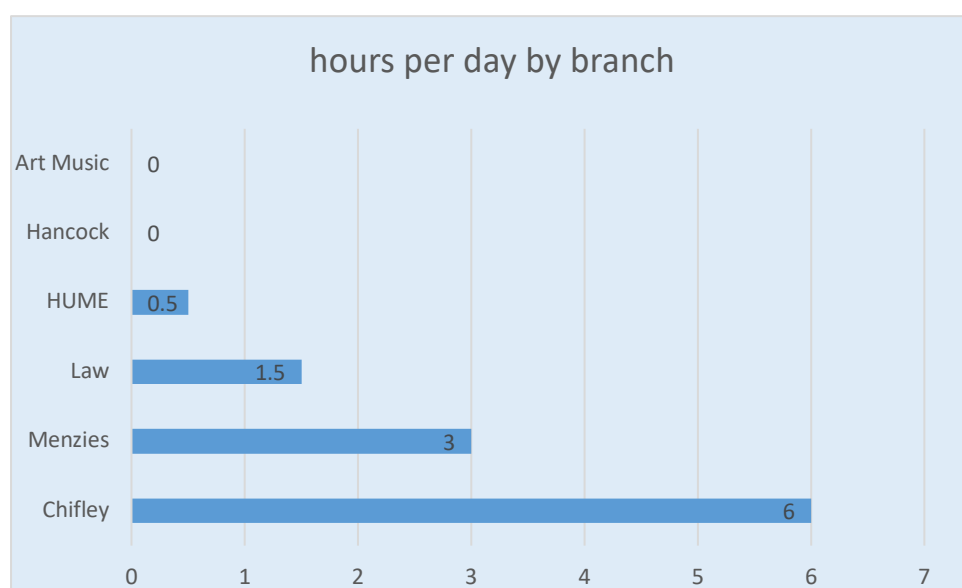
Items received for ANU patrons	53	75	72	75	37	47	359
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Note: The busiest time to date has been March and at the point of assembling this graph it is noted that the statistics for August are also high. Many of the other institutions allow Undergraduates to borrow via BONUS+.

** does not include the 107 items Chifley Library processed for HUME*

How much time is each branch spending on BONUS+?

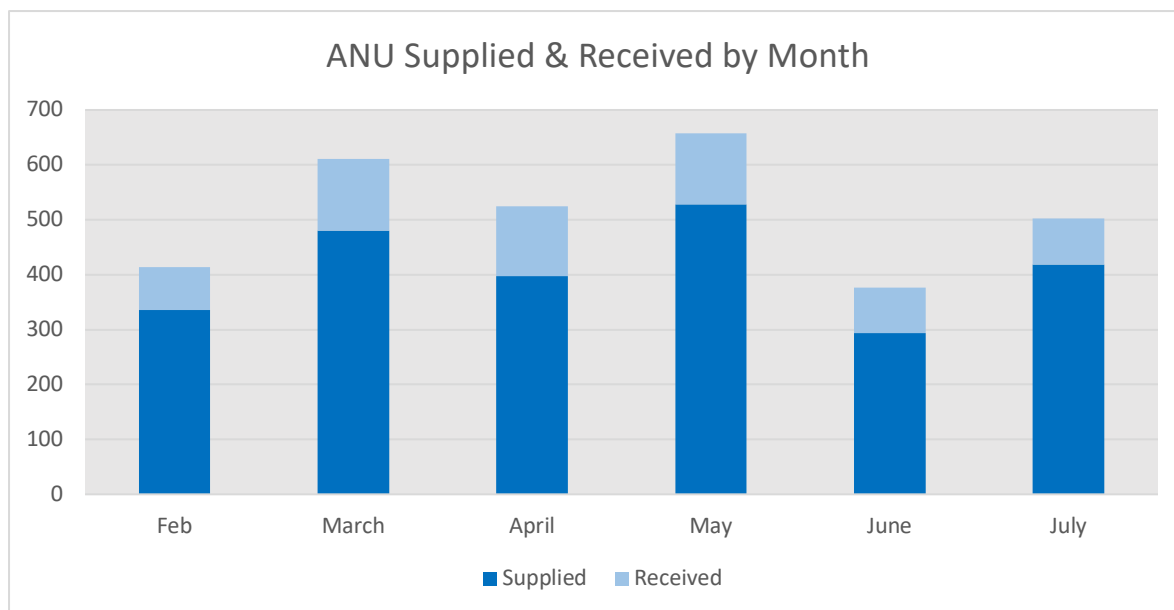
Vanessa Galloway asked library staff to estimate how much time they are spending on BONUS+ work per day. The daily total for each staff member has been collated, and Chifley staff are spending around 6 hours per day undertaking BONUS+ work.



Time spent by supervisors chasing up books and time spent by after hours staff collecting books in the evening is not yet quantified and therefore not represented. Hancock reported a decrease in ILL requests leading to a null increase in the overall workload when taking into consideration the processing of BONUS+ items.

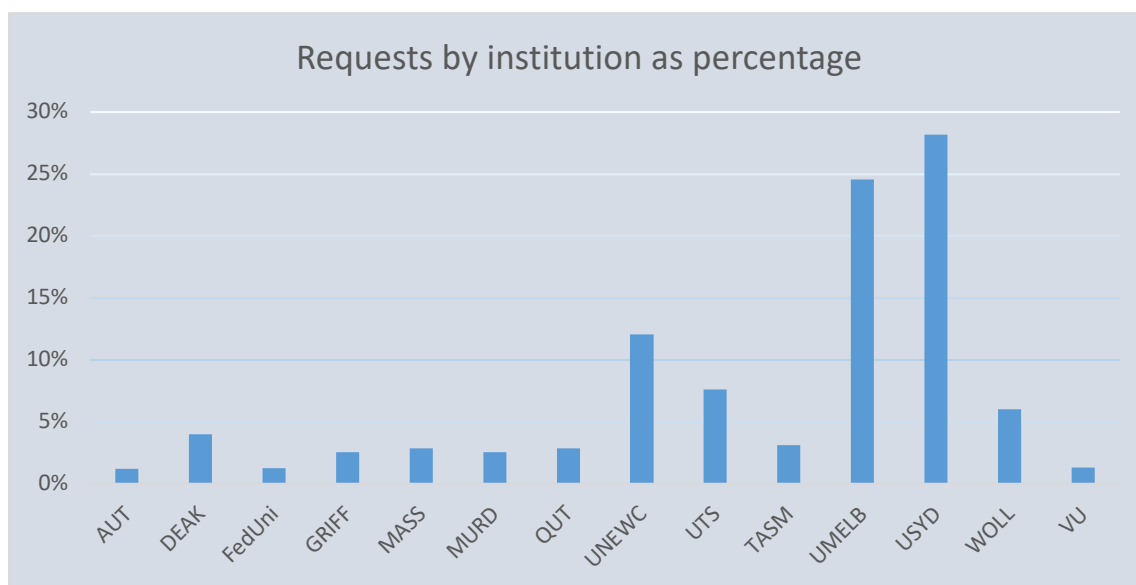
Number of requests received and items supplied

The number of requests received and supplied each month was also looked at. Noting as before that May was the busiest month. Up to July 2017, the combined activity has not exceed 700.



Which institutions are requesting our books?

The University of Sydney (28% of the requests) and the University of Melbourne (24% of the requests) have been the top two institutions borrowing from the ANU Library. Also noted previously, these institutions allow their undergraduates to borrow via the BONUS+ scheme. The University of Newcastle comes in at third place with 12% of loans from the ANU Library. The Library of Congress classification numbers most requested are



La Trobe University in Melbourne and Edith Cowan University in WA have not requested anything from ANU in the past 6 months and are not included in this table.

Does the Sierra INN-Reach module provides a seamless service?

Yes-for users

No-for staff

While it is great that users don't need to leave the Library catalogue and log into another portal to submit their requests this seamless BONUS+ workflow is not available for the Library staff. From staff point of view there are a lot of inefficiencies and staff need to flick between modules and services to complete all of the processes for BONUS+ supply and receipt.

Some of the common problems:

1. Multiple holds on a single item creates problems with the due date
2. Being unable to read the book barcode from BONUS+ lenders with the barcode reader used by the ANU Library
3. If there are multiple copies of a book available and the particular requested copy is missing, it is not possible to check out another available copy on behalf of the requestor

While there are work arounds for dealing with the above issues, it needs to be noted that these work arounds all depend on the competency of the staff member not the Sierra INN-Reach module capabilities to succeed.

Recommendation: That the iii Users Group, BONUS+ Group and ANU directly advocate for improvements to fix these issues by communicating with iii and logging requests.

At the point of implementation ANU Library chose not to allow UG's to access the service

The question asked of Library staff was - at this point would you say "yes" or "no" to adding Undergraduates to this service and why?

The group strongly supports the idea of adding Undergraduates to the service, if the outcome of the 12 month review of BONUS+ is a positive as the 6 month review.

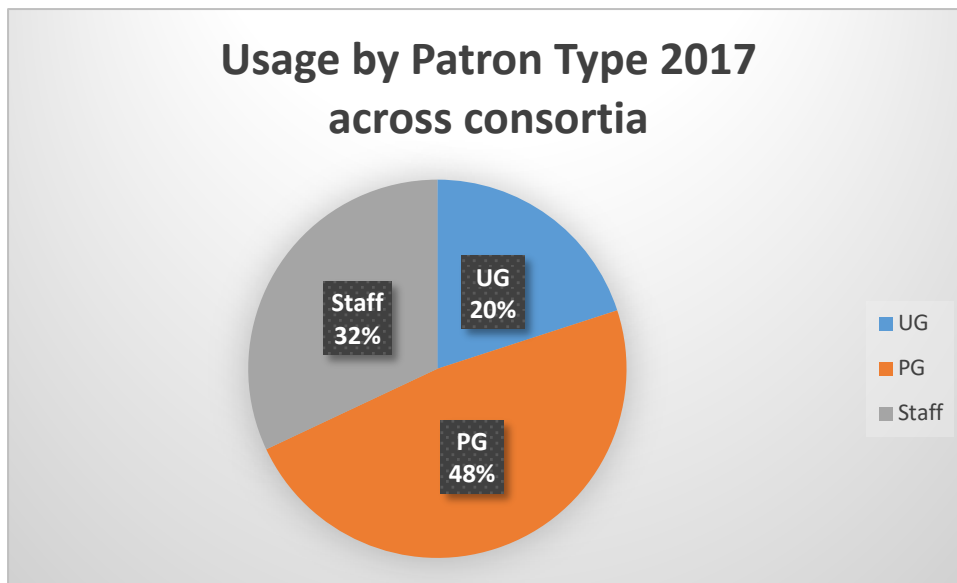
- The majority of Library staff attending the meeting were in favour of continuing through to the 12 month period and reassessing offering the service to undergraduate students from 2018,
- However there was a proviso to this recommendation that ANU Library creates a new BONUS+ profile for newly purchased books and books purchased specifically for reserve or short term loans.

Recommendation: That the service be assessed again after it has been offered for 12 months i.e. March 2018

Recommendation: That the undergraduates be added to those receiving the BONUS+ service if the outcome of the 12 month review of BONUS+ is a positive as the 6 month review.

Implications for including undergraduates

- Vanessa Galloway contributed the following to this point to the discussion - for the past 3 years consortia statistics consistently report Undergraduates borrowing at 20% of their borrowers The ANU Library could therefore assume if we included the undergraduates to those able to use the BONUS+ service, an annual increase in transactions of 20%. Would be expected.



The *insignificant* decrease in DocDel requests from ANU users proves that the impact of the BONUS+ service has not reached the impact level that ANU Library staff expected. Partly this is because of the timeframe that is often required by undergraduates (for example short timeframes for assessments). The items available through the BONUS+ catalogue are beneficial for all on campus Library users.

Noted that in terms of

- staff workload, receiving items is not as time consuming as processing requests and does not take up as much staff time
- postage costs have not blown out as it was expected they would as the number of BONUS+ request has not been as high as anticipated
- 20% increase expected if undergraduates become part of the service, the agreed BONUS+ postage budget and the existing staffing structure in the Branches should suffice

Did ANU Library allow access to the right items?

After discussion the group believes the ANU Library have the right mix of items available for loan, with one exception. Other BONUS+ libraries allow access to recently purchased resources, however the timing of Law courses at other universities has caused newly purchased ANU Law Library resources to be heavily used by students from these institutions. These items are purchased the previous semester in readiness for them becoming part of the ANU Law Library short term loan collection. Eagle eyed law students at other universities are requesting them as soon as they arrive and this is causing issues when the material is required to go onto the short loan shelves in readiness for use by ANU students. The group fully supported a recommendation to create a new grouping on Sierra

that would allow the ANU Library to hold back newly purchased items for 12 months before allowing loan to BONUS+ members.

ANU Library has ensured that items excluded from BONUS+ are not able to be requested by other members of the consortia.

The group also discussed the issue of whether the ANU Library should broaden or tighten the types of items we allow to be borrowed?

- The group agreed that it did not wish to broaden or narrow the items available for borrowing – the one exception is noted above.

Has anything happened that you didn't expect would be an outcome of offering this service?

- Undergraduate textbooks are being requested from ANU by other BONUS+ members. The ANU Law Library in particular has noticed that books which have been purchased for use in Semester 2 were being requested for BONUS+ loans and now books ordered for Semester 1 2018 which are coming into the Library are being requested for BONUS+ loans.
- Other than this issue, no body reported any issues arising that they had not expected to arise.
- Recommendation 3: That the decision to exclude textbooks be confirmed as a permanent decision.

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How do you feel the students have reacted to the service?

- Hancock Library reported that they have more Postgraduate students using the service than they have academics/researchers.

Feedback from users

In a nutshell I love it. LOVE IT. It is a great supplement to the ANU library collection and is so easy to use. I also love the way that I can select a library to collect the books from. I used to choose Chifley but soon realised that Menzies was easier to access quickly for someone who is not on campus much.

ANU Postgraduate student

How do you feel the academics/researchers/professional staff have reacted to the service?

- Overall there has been very positive feedback from the ANU academics and researchers

- Concern about the length of the loan, not being long enough for some of our academics. Library staff do point out that they have the right off renewal which does extend the loan period.
- Noted that some academics are having a “try before they buy” service i.e. having the book for a period of time and deciding if they want the title in the ANU collection.
- Professional staff are using the service to help augment the resources that they require for their Professional Development.
- Promotion and advertising of the new services was limited, due to the service going live in two stages. It was agreed a concerted marketing and promotional push may ensure more ANU academics, researchers and post-graduate students would become aware of the service. Posters and other promotional resources are available through the Australasian BONUS+ group and would require only minor changes to be branded for our library. The group agreed that this would be a worthwhile activity to help get the message out that BONUS+ was part of the ANU Library.

Recommendation: That ANU Library utilise the marketing and promotions kit already trailed and tested by the Australasian BONUS+ group during Semester 1, 2018.

Feedback from users

I just used it—brilliant and seamless! I looked up a book we don’t have (the Landmark Herodotus) and there it is at the U of Wollongong. I’m assuming this will replace doc del (at least for those at Unis within the consortium).

Senior Lecturer, Classics and Ancient History

As part of my professional development I was advised to source books on RDA and descriptive cataloguing. I was pleased to be able to access the books via BONUS+ instead of having to go to another university library or purchase them at my own expense. It was very convenient to be able to pick them up at my own branch.

ANU Library staff member

I know that Interlibrary loans cost quite a lot so I have always been careful to order only those books by ILL that were absolutely essential. With Bonus Plus I have ordered books that sound like they may be relevant to my studies, but that I would have hesitated to put the University to significant expense to obtain. Knowing that Bonus Plus is cheaper for the uni has made me a lot bolder in my Bonus Plus orders. The interesting aspect of this is that every book I have ordered has turned out to be useful. The downside is that 21 days is a relatively short period of time for the use of a book such as a text commentary but I shall resort to interlibrary loans for books that require longer use.

ANU Lecturer, ANU College of Arts and Social Sciences

I found BONUS+ very easy to use, and with the exception of one item that could not be sourced, it was a very efficient and fast service.

ANU Library staff member

I'm very happy with BONUS+. I've found it easy to use, efficient and the books usually arrive within 2-3 days of being ordered, which is great. This is especially helpful when a book in the ANU library is already loaned out as the recall can take quite some time. It's very useful to be able to renew the item once. I studied and worked in the United States for some time and the development of integrated borrowing systems between multiple academic libraries had become the standard there, and I'm very pleased to see it happened here as well.

ANU Lecturer, ANU College of Arts and Social Sciences

I can see BONUS+ being useful for teaching staff who are considering whether to request a purchase for the ANU library. I borrowed one fabulous book via BONUS+ that I am going to recommend our library purchase because it covered such a wide range of subjects so well. From the book review I read before requesting this book through BONUS+ I would never have realised what an interesting, useful book it would be.

ANU Lecturer, ANU College of Arts and Social Sciences

What services, if any, have declined in the last 6 months?

Print items consulted in the library are not counted therefore they are unable to be cited statistically, however anecdotally there appear to be fewer print items that are collected for re-shelving. The number of print items borrowed continues to decline –since 2013 there has been a 43% decrease in the use of print resources.

As a consequence of fewer loans, there is also a decline in the amount of items that require re-shelving.

Issues identified

The following issues were identified and were considered significant enough to for recommendations to be made –

1. The iii Users Group, BONUS+ Group and ANU directly advocate for improvements to fix these issues by communicating with iii and logging requests.
2. Reassess the service once BONUS+ has been an active service for 12 months, report to follow.
3. Undergraduates included in the ANU Library community being offered the service in 2018, if the 12 month BONUS+ report is as positive as the 6 month report is.
4. Law textbooks that were ordered throughout the Semester 1 were being scoped up by watchful students from other universities, ensuring that they

were able to access the latest copy of a Law textbook before it even go to the shelves in the Law Library. A very quick fix was put in place once we realised that this issue was happening and a new category of items to be excluded from the BONUS+ profile was created which ensured that this practice has ceased. How and why this was happening was because ANU Law courses are being run on a different schedule to other universities and enterprising Law students realised this and were eager to get hold of items destined for the Reserve shelves before they were placed there as these resources are excluded from the items borrowable in the BONUS+ scheme.

5. Market and promote the BONUS+ service to ANU academics, researchers and postgraduates utilising the kit of resources created by the Australasian BONUS+ group.

Recommendations and assigned areas to work on these recommendations

Recommendation 1: That the iii Users Group, BONUS+ Group and ANU directly advocate for improvements to fix these issues by communicating with III and logging requests. (BONUS+ Coordinator and Library Systems & Web Coordinator)

Recommendation 2: That the service be assessed again after it has been offered for 12 months i.e. March 2018 (Associate Director, Library Services, BONUS+ Coordinator and Branch teams working with BONUS+ items)

Recommendation 3: That undergraduate access be reviewed as part of the assessment of the BONUS+ service at the 12 month review. (Associate Director, Library Services, BONUS+ Coordinator and Branch teams working with BONUS+ items)

Recommendation 4: That the decision to exclude textbooks be confirmed as a permanent decision. (Associate Director, Library Services, BONUS+ Coordinator and Branch teams working with BONUS+ items)

Recommendation 5. That ANU Library utilise the marketing and promotions kit already trailed and tested by the Australasian BONUS+ group during Semester 1, 2018. (Associate

Director, Library Services, BONUS+ Coordinator and Branch teams working with BONUS+ items)

Heather Jenks

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and

Vanessa Galloway

User Services and ANU Library BONUS+ Coordinator