IT'S A BONUS PLUS! COLLABORATING TO SHARE LIBRARY RESOURCES ACROSS AUSTRALASIA

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ABSTRACT

This paper discusses BONUS Plus http://bonus.newcastle.edu.au, an international resource sharing consortium that traverses two countries, covers more than one sixth of the globe, and operates across four time zones. Eleven academic partner libraries in New South Wales, Victoria, Western Australia, Queensland, and New Zealand share monograph resources. The primary goal of the BONUS Plus consortium is to share seamlessly material from member library collections among their clientele. Launched in October 2007, BONUS Plus provides access to more than 6 million items through a central online catalogue. Almost seventy percent of the catalogue titles are unique to one library. Individual member libraries have seen an expansion to their local collections through access to the shared material, in a climate where resources are limited and clients expect fast results.

1. BACKGROUND

BONUS Plus began in 2004 as a two year research project that aimed to investigate access to scholarly information resources for students and staff of participating university libraries via a user-initiated interlibrary borrowing system. Four academic libraries in the state of New South Wales participated in the project, named BONUS (Books of NSW University librarieS). A central catalogue of shared monograph resources using consortial software enabled online unmediated requesting by member library clients. Results from the project indicated that by providing unmediated access to a distributed collection across several university library collections, BONUS offered ease of use and access to broader collections. It demonstrated that such a resource sharing scheme complemented traditional interlibrary loan services and supplemented individual library monograph collections. Costs were lower than for interlibrary loans primarily because of reduced staff intervention. Statistics showed decreases in interlibrary monograph loans at member libraries.

1.1. BONUS PLUS

Following the successful BONUS trial, four academic libraries from Victoria - Deakin University, University of Ballarat, University of Melbourne and Victoria University - joined the University of Newcastle and the University of Technology Sydney and BONUS Plus http://bonus.newcastle.edu.au/ was launched in October 2007. Murdoch University, Western Australia, joined in 2008, followed by Massey University, New Zealand, in 2009, and Edith Cowan University, Western Australia, La Trobe University and Queensland University of Technology in 2010.

BONUS Plus covers one sixth of the globe, four time zones, and is the first implementation of a consortial borrowing scheme that crosses national boundaries. As a union catalogue it offers some unique features. The material contributed by participating libraries, primarily low use monographs, is available for loan, and the requesting process is online and unmediated. In this way it differs from other union catalogues which may provide information about member collections for cataloguing or inter-library loans, but with mediated requesting. As of July 2010 the BONUS Plus central catalogue offered over 6 million volumes for loan and more than 3 million titles. Approximately seventy percent of the titles are owned by one library, with only fifteen percent being held by two libraries. BONUS Plus has extended the benefits of the original BONUS project, with more libraries offering resources to complement and supplement local monograph collections.

1.2. Usage

Clients made 143,605 requests from October 2007 to July 2010, 128,655 of which were fulfilled, an overall fulfillment rate of eighty-nine percent. The primary reason for requests not being filled is that items are not on the shelf at the point of retrieval, some hours after a request has been made. The average cost for a fulfilled request is under ten dollars, made up of staff costs and postage. Costs are absorbed by the member libraries and there is no charge to clients for the service. Statistics provide lending and requesting figures between libraries and a ratio of lending to borrowing for each library. A request balancing table manages the order in which libraries are queried for loans. The priority order can also be adjusted by the central system administrator to reduce demand for new BONUS Plus member libraries.

2. MEETING CLIENT EXPECTATIONS

2.1. Seamless access to resources

A recent paper on digital information seekers from the Joint Information Systems Committee (JISC) and OCLC [1] stated that library systems must do better at providing seamless access to resources. Client expectations in the current online environment are for immediate access to information with a minimal amount of time and effort. BONUS Plus achieves ease of use for clients in a number of ways. Library clients search their local catalogues, and for items that are not held, or unavailable for loan (checked out, missing), select the BONUS Plus icon to carry the search across to the BONUS Plus central catalogue, without the need to rekey search terms. Online requesting with immediate authentication against local systems enables inter-library borrowing without additional registration, creating a global lending environment. The consortial system software selects items for lending, fulfilling requests first from within priority regional lending groups for New South Wales, Victoria and Western Australia. This can shorten the delivery time between libraries to one day.

All staff and students are eligible to request, including undergraduate students, internal and external clients. Postgraduate students have the highest requesting rate (forty percent), followed by undergraduates (thirty-seven percent) and staff (twenty-two percent). Local holdings and circulation data as well as changes to bibliographic records are uploaded from member library catalogue systems to the central BONUS Plus catalogue using the INNReach consortial borrowing software, automatically and in real-time, delivering constant catalogue accuracy. Current circulation status for all items is reflected immediately in record displays in the BONUS Plus catalogue.

Lorcan Dempsey [2] from OCLC emphasises that it is not sufficient to make resources available on a network. They need to be integrated into client workflows and library workflows. BONUS Plus achieves this by providing seamless access to searching, client authentication and requesting. Within libraries BONUS Plus functionality is integrated into document delivery and circulation processes, operating in a similar way to intercampus requests and inter-library loans.

2.2. Communicating the message

Email communication provides quick information to clients about availability of items for pickup and loan. At any time clients can view the status of their requests, cancel requests and request one renewal, through personal client record facilities in local library catalogues.

Online surveys of clients conducted in 2007 and 2008 indicated that clients could not always find information about BONUS Plus. Publicity and promotion are vital to ensuring maximum usage of the service. Marketing campaigns have included a BONUS Plus success story competition with prizes; posters, bags, t-shirts, mouse mats, pens, and green sweets distributed at circulation desk points. Such campaigns are supplemented by ongoing promotion via library websites, information literacy sessions, targeted email and online news, printed postcards distributed to clients and available at library catalogues, posters, library displays, publications in campus newsletters, plasma screens in library foyers and information common areas. An example of website promotion from Massey University, incorporating the features and geographical coverage of BONUS Plus, is shown in Figure 1.

Figure 1: Massey University Library BONUS+ promotion (Design Russell Hewitt)

2.3. Client satisfaction

Feedback from two online surveys indicated that a majority of respondents strongly agreed that BONUS Plus is a good way to obtain materials not available from local libraries, and support the sharing of materials. Clients also provide feedback through a link on the BONUS Plus catalogue. Some sample comments received are:

"More unis should be participating in this sharing scheme as bonus benefits everyone involved."

"Fantastic service. Makes sense to pool university library materials to provide collective greater access to students. Well done."

3. RETURN ON INVESTMENT

One of the major benefits of the BONUS Plus consortium is access to an extended collection with the increased availability of locally held resources. An examination of the University of Newcastle's fulfilled BONUS Plus requests submitted in May 2010 indicates that from a total of 1,195 requests, fifty percent (599) were for titles not held locally. Requests for held titles which would normally be blocked were processed through BONUS Plus because twenty-five percent (303) of the local copies were on loan, sixteen percent (190) were in high demand collections (Short Loan or 3 Day Loan status), and two percent (22) were on order, withdrawn or missing. Interestingly, 92 requests (seven percent) were for titles which had a copy available in electronic book (ebook) format, suggesting that the client preferred a print copy from a partner library over an electronic version of the requested title. This requires further examination.

The University of Newcastle loads ebook records into its local catalogue but they are not included as available items in BONUS Plus. The surprisingly high number of requests for a print copy when an electronic version is available has a number of possibilities:-

1. BONUS Plus catalogue used to locate the item. If the client used the BONUS Plus catalogue as the preferred search tool (rather than initiating a search in the local catalogue) the client would not be aware of the availability of an ebook as eresource records are not loaded into the BONUS Plus catalogue.

2. Client prefers a print copy. If the local library catalogue was used to initiate a search, electronic resource records are prioritised and displayed before print holdings. Although it is possible that a client may have difficulty interpreting the record information, statistics indicate that ebooks are an acceptable format by the majority of clients with usage statistics now exceeding print loans. Therefore a client's preference for obtaining a print copy from another library rather than use a locally available electronic copy is a possibility.

The relatively high number of BONUS Plus requests for copies of locally held titles on loan, on restricted loan status, missing or on order (515 copies, or forty-three percent of total requests submitted) indicates a major advantage of the BONUS Plus consortium. Providing access to copies in other libraries for high demand titles not in the BONUS Plus catalogue provides an alternative to obtaining more duplicate copies, especially when it is difficult to anticipate demand in advance or purchase additional copies quickly. A close examination of the requests also indicates that the level of duplication within these collections is high (10 plus copies) with BONUS Plus providing supplementary copies for short periods of high demand.   The University of Newcastle conducted a similar study in April/May 2006 when results also indicated a high number of requests for titles which were locally held but not available: thirty-five percent (330) of a total of 939 requests.

Another advantage of BONUS Plus is the ability for clients to locate, request and borrow titles not held locally, accounting for fifty percent of requests at the University of Newcastle. Through the ENCORE discovery catalogue interface that integrates all searches, clients can view BONUS Plus results instantly because the search is run simultaneously across the University and BONUS Plus catalogues. Library clients have access to millions of titles to support their teaching, learning and research activities with BONUS Plus becoming an alternative to the traditional interlibrary loan system. From October 2007, the number of traditional interlibrary monograph loans at the University of Newcastle has declined with a substantial increase in the number of BONUS Plus requests, as indicated in Table 1 below.

Year	Interlibrary loans - Books	BONUS Plus
Oct – Dec 07	402	1025
2008	1907	9246
2009	1342	11322
2010 YTD	421	5154

Table 1: University of Newcastle interlibrary loan and BONUS Plus requests

The ease of placing requests, availability of more items as new libraries join, and the relatively quick turnaround time of four to five days from the time of request to delivery makes BONUS Plus a popular choice. A major difference between BONUS Plus and mediated interlibrary loans in many academic libraries is the availability of BONUS Plus to undergraduate students. Although postgraduate students are the largest cohort of BONUS Plus users, the large number of requests for high demand teaching and learning resources by undergraduate students is evident. This in turn leads to increased use of university library collections and ongoing return on investment on a national and international level.

Comparisons for three BONUS partners in 2007 showed a unit cost of $8.16 for a BONUS request against $14.97 for a traditional interlibrary loans monograph request. The cost of processing BONUS Plus requests at the University of Newcastle in July 2010, including postage costs for sending an item to the closet and most distant partner, are shown in Table 2. The costs cover the process of reading the request, retrieving an item, to packaging and mailing.

BONUS Plus requests	Sydney	Perth
Labour costs @ HEW 3 $1.33-$1.97 per request	$1.97	$1.97
Postage per item	$2.12	$3.43
Total cost per item	$4.09	$5.40

Figure 2: BONUS Plus costs at University of Newcastle 2010

4. COLLABORATION

A welcome outcome of the project is the collaboration and networking among library staff that has been facilitated around library system technology. Member libraries appoint a local BONUS Plus site co-ordinator and together with the BONUS Plus Project Co-ordinator and BONUS Plus System Administrator, the "BONUS Plus buddies" maintain and monitor the service, develop procedures, share information and workflow procedures. Regular meetings and communication among the coordinators, both in person and by email, ensure shared understandings and efficient practices. A Steering Committee of member University Librarians and Library Directors provide overall management of BONUS Plus.

5. FUTURE DEVELOPMENTS

In an age of electronic resources is there still a place for sharing print material? BONUS Plus demonstrates that libraries with considerable investments in print collections continue to have a demand for a range of such material to complement electronic resources. The consortial software used for BONUS Plus interfaces successfully with Millennium library management system software. Similar consortial borrowing implementations in North America incorporate other library software systems and types of libraries, and this is a possible future exploration for BONUS Plus.

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