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From: Bebbington, Sonia <sonia.bebbington@bibliottawalibrary.ca>
Sent on: Friday, February 28, 2025 7:24:56 PM
To: adam@adamjohnsmith.com
CC: Ginther, Craig <Craig.Ginther@bibliottawalibrary.ca>; Macintyre, Sarah <sarah.macintyre@bibliottawalibrary.ca>; Tremblay, Julie <julie.tremblay@bibliottawalibrary.ca>; Basile, Anna <anna.basile@bibliottawalibrary.ca>
Subject: RE: Inquiries
Attachments: 20250228 Trustee Smith informal inquiry reply.pdf (95.71 KB)

Follow up:

Dear Adam,

Thanks for your inquiries. Please find attached some information compiled by Sarah, Craig, and their teams which provides general context for services like ILL and STP, and addresses the specifics of your questions.

Wishing you an excellent weekend,
S.

From: adam@adamjohnsmith.com <adam@adamjohnsmith.com>
Sent: February 11, 2025 11:49 AM
To: Bebbington, Sonia <sonia.bebbington@bibliottawalibrary.ca>; Basile, Anna <anna.basile@bibliottawalibrary.ca>
Cc: Tremblay, Julie <julie.tremblay@bibliottawalibrary.ca>
Subject: Inquiries

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Dear Sonia and Anna,

I hope you're both doing well.

As part of my work to better understand the OPL brand, I've been reflecting on how the user experience and the depth of our collection contribute to overall brand perceptions. In that spirit, I'd like to submit a few informal inquiries related to how users engage with the collection—particularly around book availability, requests for new materials, and the user experience of these processes.

I've outlined a few specific inquiries below and would appreciate answers to these questions. Based on the responses, I may consider submitting additional questions formally through the board meeting inquiry process.

1. Book Availability & Search Metrics

- Does the library track how often users search the online catalogue for a book?
 - What percentage of searches results in a book that is unavailable in the OPL collection?
- If this data is not currently tracked, has there been any discussion or consideration of tracking it to assess demand for unavailable books?

2. Book Purchase & Interlibrary Loan Requests

- How many book purchase requests and interlibrary loan requests are submitted annually?
 - Does the library track how many users begin the request processes (either for purchase or interlibrary loan) but do not complete it?
 - Can you share any insights into how often this happens?
- Are there any observations or insights on why users abandon these requests (e.g., complexity of process, long wait times, lack of awareness)?
- What is the mean average length of time between submitting a purchase request or interlibrary loan, and fulfilling that request?
 - How frequently are their outliers to these submission timelines?

3. Approval & Rejection Rates

- What percentage of book purchase and interlibrary loan requests are approved versus rejected?
 - Please provide a breakdown of the most common reasons for rejection, including the number of rejections attributed to each category (e.g., budget constraints, availability elsewhere, specific policy restrictions, duplicate holdings)?

4. Process Improvement

- Has the library conducted any assessments on the user experience of the book request process? If so, are there any findings or planned improvements?
- While the request process is already digitized, are there any discussions or plans to further streamline or improve it to enhance the user experience?

I appreciate your time and any information you can provide. Please provide a timeline on when I can expect answers. Looking forward to your thoughts.

Best,
Adam

Hello Trustee Smith,

Thanks again for taking an interest in our clients' user experience when they engage with the collection, specifically with regards to searching the catalogue, Inter-Library Loans (ILLs), and Suggestions to Purchase (STPs). In addition to answering your questions below, we will try and provide context and background information to help present a fulsome picture of our services.

The OPL online catalogue is powered by BiblioCommons – this is the most popular “discovery layer” used in public libraries in North America; it connects to the underlying Integrated Library System (ILS), which holds both client data and the metadata about OPL collections. BiblioCommons is the interface that OPL clients use to search for books, place holds, submit Suggestions for Purchase (STPs), and manage their accounts.

Catalogue Search Analytics

Catalogue search metrics are provided by BiblioCommons through Google Analytics. This tool provides a comprehensive set of canned and ad hoc statistics reflecting a myriad of search types and categories. For example, number of searches by keyword, author, title, series, subject, etc. over a requested period of time. These statistics are anonymized and aggregated to protect the privacy of clients. We can set up tracking against specific search terms if necessary, although we have little reason to do this type of tracking as a matter of course.

The percentage of searches that result in zero results is not currently tracked by OPL, but this could be retrieved upon opening a ticket with BiblioCommons. However, the validity of this metric would be highly dependent on the search term(s) input by the user. For example, they might use an incorrect search type (e.g. searching for a book title through an author search), use incorrect spelling, etc. That said, if a user searches for a valid title using a title search and that book is not in the OPL collection, the zero results page includes a ‘Did you mean’ function to catch simple spelling mistakes, and also offers suggestions to try a different type of search, to suggest a title for purchase, or to request an Inter-Library Loan.

In this way, OPL provides clients with several ways to access items not in our collections. We encourage them to suggest items to purchase, and we work with the Ontario Library Service (OLS) to provide Inter-Library Loans to our clients, and other clients throughout Ontario and elsewhere. As well, we have a partnership with libraries in the National Capital Region to support access to materials in each other's collections, called SmartLibrary. With SmartLibrary, unlike as with the ILL process, we do not coordinate movement of the collection items between institutions – instead, the SmartLibrary card acts as a membership card and gives access to the client to visit the partner locations, browse, and borrow eligible books directly. It is a much more self-directed service.

All said, OPL clients have a variety of ways to access collection items:

- OPL staff buy collection items according to the Content Services Framework and make them available to clients in the online catalogue at <https://ottawa.bibliocommons.com/>
- If a book is not in the collection, clients can get access supported by OPL by submitting an ILL request, submitting an STP request, or using SmartLibrary.

How does ILL work? ILL is a reciprocal service that supports all Ontario libraries and broadens access to the range of materials that Ottawans can borrow. Items borrowed via ILL represents a very small amount of our overall circulation; in 2024, ILLs were 0.05% of our total items borrowed (11,569,445). ILL is a

valuable service that allows us to meet client needs for items that may be out of print, not available for purchase, outside of the scope of our collection (perhaps an academic title, or a very niche title that does not have wide appeal, etc.). OPL is part of a wider shared ILL network based on a shared software run by the Ontario Library Service, and delivered through agreements with Canada Post. Clients from other library systems borrow items from our collection, and we borrow items from other systems on behalf of OPL clients. The ILL network includes public and academic libraries; some libraries charge for some ILL items (generally to recover their own costs such as shipping), but most do not. The extent of our agreement is not limited to Ontario – we borrow and lend material around the world – mostly to and from Ontario, but also Canada, the US, and sometimes Europe and elsewhere. With ILL requests, we do not “reject” any submissions – the only questions are whether the item is available in another participating library, and whether the client is willing to pay a small fee if the loaning library charges one. In some cases, we cannot get the item at all – other libraries do not have it, or are unable to lend it, or the loan/postage fees exceed the amount the client is willing to pay (often the case with international academic libraries), the item might be too new (items published in the last 12 months often do not get lent), non-circulating (reference only), or the format is not one that lends via ILL (DVD, Book on CD, eBook).

- How many interlibrary loan requests are submitted by OPL clients annually?
 - In 2024, a total of 5844
- How many ILL requests are books vs other formats?
 - Books = 5800, Microfilm = 12, Articles = 32
- What is the mean average length of time between the client submitting an interlibrary loan request, and responding to that request?
 - In 2024, 3 weeks.
 - Response here is presumed to mean the time it takes between the client submitting their request and the time they receive a notification that it’s ready for them to pick up at their branch. Fulfillment time varies, as we are dependent on the responsiveness and proximity of partner libraries and Canada Post.
- How frequently are there outliers to these timelines?
 - 25% of the requests take longer than the mean average, as some are complex. This means that the search may involve international libraries, the initial copy located is unavailable, or there were other complications in the request fulfillment process (either on the part of the lending library or OPL, the borrowing library).
- What percentage of interlibrary loan requests are filled versus unfilled?
 - OPL was able to fulfill 84% of ILL requests in 2024. 16% of requests went unfilled (we tried but could not get the item from another library, generally for one of the reasons outlined above).

How do STPs work?

Clients can submit Suggestions to Purchase (STP) when they would like an item added to the OPL collection. The STP form is a module within the BiblioCommons software. The STP function is intended to capture recent missed selections that would enhance the collection. Since the collection is a shared resource for all Ottawans, it's important that items added to the collection do not represent very narrow or niche interests – we always look at what items will be of interest to as many clients as possible. As well, it is not intended for users to flag pre-publication items (e.g. “not yet published or distributed in Canada” or items reviewed in the media that will be published later this year, for example). It is also not intended for items older than 2 years, for which ILL is more appropriate (“publication date older than limit”). Staff use the Content Services Framework to evaluate STPs, the same way we would when buying

other items for the collection. Unlike with ILL, OPL staff will reject STPs that do not conform to our Content Services Framework. In 2024, we received 14,858 STPs – these are all kinds of formats, not just books (DVDs, CDs, eBooks, eAudiobooks, etc.) and in 2024, 54% were approved. The reasons for not approving STPs are varied, per the chart below:

Common reasons suggestion was not approved:	Instances in 2024:
Publication date older than limit (clients re-directed to ILL)	2458
Not yet published or distributed in Canada	1397
Does not conform to our Content Services Framework	1251
Material is out of print or not available from our vendors	526
eBook that is not available for libraries to license	392
No Canadian Rights	216
Lack of resources to process (as of May 2024, reason no longer in use)	165
Already available at OPL in another format	121
Incomplete/inaccurate information on form	30

It is difficult to determine a clear mean average time frame for STPs; Sometimes, an STP can be reviewed quickly, and the client can get a reply within a week. But sometimes they can take as long as 6 months. Factors determining time to process requests include:

- Titles we are planning to purchase as part of our regular selection process receive quick responses – this happens frequently as we review weekend newspaper book reviews on Monday and add any items that meet our selection criteria but were not yet purchased to the catalogue.
- Material with a publications date older than our limits—these get an instant auto response when the date is entered correctly by the client. The message the client receives directs them to the more appropriate avenue of ILL.
- Material that is not yet published—these are responded to quickly as there is no further staff assessment to make yet. The STP page indicates this.
- Material with reviews—these will usually be responded to in one or two months.
- Material with no reviews/unknown publisher/lack of information—sometimes these will take a long time to process, as staff must research the title to determine whether it meets the selection criteria in the Framework.
- The volume of requests also affects processing time. We receive more requests for Adult Fiction and Non-fiction in English than other collections. As these are the specializations of specific members of staff, requests in these collection areas may take longer to work through.

ILL and STP Analytics

We do not track how many clients start an ILL request or STP request and then abandon them (meaning, they begin filling out the form and do not complete it). Based on the experiences of staff interacting with clients in branches, there may be any number of reasons why a client has chosen not to submit the form – maybe they found the book in the catalogue, maybe they found a related title, chose to buy it, etc.

Process Improvements

The sector standard BiblioCommons platform which we use for catalogue searching and STP requests is continually refined through additional user experience testing – e.g., there is a process for member libraries to request process or interface changes where user or staff feedback warrants. The STP module is a smaller component of the overall discovery layer function, and so more development energy is

devoted to general discovery functionality. For pages that are within the OPL web domain (e.g. ILL request form), staff typically conduct user experience testing as part of website redesign work and are always receptive to feedback. Staff also receive regular feedback from colleagues, particularly those working in the branches, regarding usability, based on their interactions with clients. The underlying ILL process, however, relies on common software inclusive of the network of participating libraries (noting that this process is internal and not visible to the public).

We would be happy to meet to discuss this further or answer any follow-up questions you may have.

Take care,

Sarah & Craig