Interlibrary Loan and Scan & Deliver
The Interlibrary Loan and Scan & Deliver unit is responsible for the lending, borrowing, and scanning of OSU materials to/from institutions across the globe.

- *Interlibrary Loan:* ILL services lend and borrow physical and electronic materials both to/from domestic and international institutions. ILL has an average turnaround time of 5-7 days for physical items. ILL also has an average turnaround time of 13 hours for articles and electronic items. This unit also supports Scan & Deliver, a document delivery service.
- *Scan & Deliver:* Scan & Deliver is a document delivery service which provides scans of articles or book chapters from materials owned by OSU Libraries.

Fiscal Year
The fiscal year starting July 1, 2021 through June 30, 2022 is covered by this report. It is noted as FY22 below.

Overview
ILL moved away from primarily a purchasing model established to meet service needs during the pandemic back into a borrowing model this year. As institutions and libraries opened, materials were more readily available via ILL once again. However, with solid purchasing experience under their belts, ILL staff were able to revamp the purchase on demand workflow to include the newly created queues, request routing, and ILS data entry workflows utilized during the pandemic.

With classes and services returning to campus, and the Libraries open to patrons, materials no longer needed to be shipped to patron's homes, as they were coming to campus and picking up materials directly from Circulation's hold shelf. The temporary Home Delivery service that Resource Sharing established and utilized during the pandemic to ship materials to patrons, was reduced.

Summit services were reinstated as soon as we had onsite staffing to support the print-based service. OSU's Summit service's return, after a year and a half hiatus, was highly anticipated by OSU patrons, library staff, and Alliance members alike. As Summit service started, OSU Summit's lending and borrowing levels were adjusted to lower levels than pre-pandemic. This allowed Summit staff to ease back into Summit workflows and processes.

During this same time, an LT2 staff member in Resource Sharing was reclassed as an LT3, which provided additional decision making and workflow support when working with both purchasing and requesting materials, supporting the reduction of Home Delivery service, and the resumption of Summit services.

Strategic Significance:
Interlibrary Loan and Scan & Deliver services connects with Strategic Goal 1, "Emphasize High Quality Services and Expertise" in that it provides the OSU community with high quality resource sharing services and expertise in obtaining and borrowing materials owned

by institutions worldwide. By providing materials not owned by OSU, ILL and Scan & Deliver staff are able to meet and impact the research, teaching, and learning needs of the OSU community. The ILL and Scan & Deliver service also connects with Strategic Goal 4, "Practice Active and Respectful Stewardship". By sharing our materials with the world, we are able to maintain the transference of information while supporting the continued growth of OSULP's local and unique collections through identified material purchases and subscription recommendations.

Takeaways:
- Takeaway 1: With materials being more readily accessible via partner institutions as pandemic restrictions lessened, Interlibrary Loan transitioned away from purchasing every physical request to borrowing them instead. With the decrease in the number of items purchased, ILL staff were able to focus on and reassess materials that constituted a purchase on demand. Additionally, with more Summit member institutions opening borrowing and lending, OSU's Summit borrowing and lending services were reinstated.
  - o Since ILL requests switched to borrowing requests rather than purchases, there is a decrease in ILL purchase numbers when looking at FY22 ILL Scan & Deliver statistics compared to the previous FY statistics. As noted above, that decrease in numbers is due to more institutions opening their services and lenders filling physical requests.

- Takeaway 2: Summit services returned Fall '21. When the pandemic hit, Summit services were shuttered across all Alliance members, including OSU. With Summit shuttered, materials out on loan were renewed, and patrons were asked to hold materials until institutions began resuming services. As more institutions opened, OSU's Summit staff monitored Alliance member's resumption of services to better plan what it would take to re-start both Summit lending and borrowing services. With courier deliveries, student support, and workflows in place, Summit staff moved forward with resuming Summit borrowing and lending services.
  - o It is important to note that while Summit services were shuttered, it was anticipated that the number of ILL requests would increase drastically since that was the alternative service patrons could use to request non-OSU owned materials. As statistics show (in Appendix noted below), that was not the case. With Summit shuttered, ILL numbers did not increase as anticipated.
  - o It is also important to note that Summit services could not happen unless Home Delivery services were reduced. Summit staff were coordinating and processing Home Delivery materials and preparing them for shipping, which was a time-consuming process. Summit staff did not have capacity to do both the Summit service and the Home Delivery service in tandem. Once Home Delivery service was officially reduced, Summit staff could focus solely on providing Summit services.

- Takeaway 3: During the pandemic, all physical materials requested (including laptops and hotspots) were sent via Fed-Ex to individual's homes. In the early fall of 2021, this service was reduced back to support only Ecampus students and faculty. With patrons returning to campus for classes, it was time to discontinue the full Home Delivery service. Rather than shipping requested materials, items were placed on the hold shelf for patrons to pick-up. The last Home Delivery packages went out late summer '21, and the temporary Home Delivery service was discontinued early Fall '21.

- o It is important to note that Home Delivery services is a service the Libraries provide for E-Campus and Remote patrons.
  - o As the temporary Home Delivery service was discontinued, the Home Delivery FAQ webpage was retired as well.

- Takeaway 4: ILL implemented new patron-facing webpages. When patrons place ILL requests, they request materials via a set of forms, depending on the type of material requested (i.e., physical book, electronic article, thesis/dissertation, etc.). The older ILL webpages and request forms were "straight out of the box" with some customization, but they were not accessibility friendly. Working with Atlas-Systems and staff from the Emerging Technologies and Systems (ETS) department, ILL completely revamped and implemented more modernized, visually accessible, and mobile friendly ILL pages. The ILL staff reviewed and consolidated the number of request forms. Additionally, once the forms went live, ILL worked with ETS staff to implement the dark mode version of the pages, and additional modern screen reader accessibility features.

Next Steps:
Next steps for the ILL and Scan & Deliver unit include:

- Continuing to build in additional cross training between ILL staff to better ensure coverage and continuity of service. When moving to a new ILL system, this will be even more critical, as all ILL staff would be learning completely new workflows and creating new documentation from scratch.
- Begin targeted investigatory work on alternative Resource Sharing programs, such as ReShare and/or Rapido to see what workflows and processes would need support if transition from ILLiad were to happen. A new ILL program could potentially improve budgetary costs, turnaround times, and provide better workflow integration with Alma.
- Begin investigation and cost estimations of resuming an expanded Home Delivery service for requested materials. Having provided Home Delivery services during the pandemic, Resource Sharing has a workflow in place in addition to a baseline budgetary projection.

Assessment:
In preparing this assessment, I consulted with Interlibrary Loan staff, reviewed documentation, ILL workflow procedures, and Resource Sharing statistics.

Respectfully submitted,

Laura Ramos   August 5, 2022

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Signature of the person (or persons) who prepared this report   Date submitted

Attachments

Appendix A: FY22 data of ILL and Scan & Deliver service, and Summit service from FY17-FY22.