Oregon State University
Libraries and Press

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, 2022 through June 30, 2023 is covered by this report. It is noted as FY23 below.

Overview
ILL maintained consistent Borrowing, Lending, and Scan & Deliver services for FY23. Toward the end of FY23, the Resource Sharing and Collection Maintenance teams collaborated and started a soft launch of storage retrieval service. Storage retrieval service was on hiatus during the pandemic and during the serials collection move to storage. Storage retrieval did not start sooner due to serials not being moved over in call number order. With items now in call number order, storage service can resume.

Summit services saw the removal of short-loans – loans that checked out for six days with one six-day renewal. This type of short-loan was usually applied to music and media items that would circulate through Summit. With the decrease in music and media items requested across the Alliance, conversations began about removing the short-loan type and streamlining the Summit loan period – meaning music and media items would check out for the same length of time as Summit books – a six-week loan with one six-week renewal. The removal of short-loans was implemented Alliance-wide and streamlined Summit loan periods for all Alliance institutions.

Resource Sharing services also saw the breakout of the branch locations in the ILS setup. Although this is partly related to how Summit materials were processed at the branch locations, the Summit team worked with staff at the Alliance and with LEAD staff to reconfigure the branches in the ILS so they'd have processing setups similar to Valley. This was a big change for the branch locations, as this had major impacts to their Summit and local item processing and circulation workflows. Branch location workflows are now more streamlined and mirror Valley Library's Summit and local item processing and circulation workflows. A benefit of the branch breakouts is that the RS team can also gather Summit statistics for the branch locations separate from Valley Summit statistics.

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: Resource Sharing started a soft launch of storage retrieval service toward the end of FY23. Storage retrieval service had been on hiatus for about three years. While coinciding with pandemic, it also coincided with the deselection of serials from Valley, and the move of serials from Valley to the new off-site storage location. Part of the delay was due to serials not being moved over in call number order from Valley to storage. During this three-year hiatus, the Collection Maintenance team worked on sorting and shifting the serials into call number order so they could be searchable and retrievable. With materials now in call number order, storage retrieval service can resume.
    - It is important to note that while the Resource Sharing team is doing a soft launch of storage retrieval service, it was in collaboration with Collection Maintenance staff, as Collection Maintenance staff are doing the retrieval of materials and bringing them to Valley for scanning and processing.

- Takeaway 2: Summit services saw the removal of the Summit short-loan; a six-day loan with a six-day renewal. This loan period was associated with music and media Summit requests. The removal of the short-loan and moving music and media to Summit long-loans streamlined Summit loan periods.
    - It is important to note that the implementation of Summit renewals happened in FY22. Prior to implementation, Summit long loan items had a six-week loan period with no renewals. The Alliance agreed to one six-week renewal for all Summit loaned items. This meant a change from a six-week loan period and no renewals to a six-week loan period with one six-week renewal. In FY23, the Alliance also agreed to increase the loan period from six-weeks to twelve-weeks with one six-week renewal. This change in Summit loan length will be implemented in FY24.

- Takeaway 3: Summit services saw the cleanup and removal of older requests from Alma (requests from 2014/15-2019). After multiple discussions across the Alliance, it was decided Alliance wide to initially retain four years' worth of requests that were in a "Completed" status. Anything older than four years and was in a "Completed" status would be deleted from the system. The deletion of those requests was successful, bringing a noticeable increase in speed when processing and circulating materials in Alma.
    - It is important to note that with the successful deletion of pre-2019 "Completed" requests, the Alliance will be moving forward with a two-year "Completed" request retention – meaning that Alliance institutions only need to keep two years' worth of "Completed" requests. The deletion of requests older than two years with a "Completed" status will be implemented in FY24.

- Takeaway 4: A major change for Summit services at OSU's branch libraries is the breakout of the branch locations within Alma. This breakout, after interest and discussion during the Alma Optimize sessions that happened in Fall '22, essentially separates the branch location processes from Valley processes. This is a boon to the branch location workflows, as they had been doing workarounds for multiple years that included having to switch desks multiple times just to process a single Summit item. In separating the branch locations from Valley, their Summit workflow is more standardized and mirrors Valley Summit processes, but under their own desk.
    - It is important to note that prior to this change, Summit statistics were all lumped under one location (Valley), as that was the way processes were set up during the migration to Alma. With the breakout of the branches, branch locations can now track their own Summit statistics.

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. Additionally, with Storage being off-site, further cross training and coverage support will be critical to maintaining Storage retrieval service.
- Continue targeted investigatory work on alternative Resource Sharing programs, such as Rapido and/or ReShare to see what workflows and processes would need support if transition from ILLiad were to happen. Potential decision and next steps with a new ILL program is likely. A new ILL program could potentially improve budgetary costs, turnaround times, provide better workflow integration with Alma, and streamline requesting processes for patrons. A new ILL program will also mean a transition period for staff to learn and adjust to new workflows and documentation.

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

Respectfully submitted,

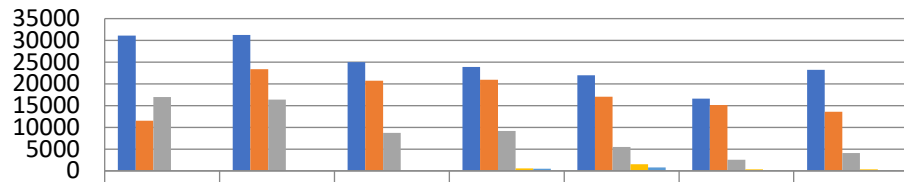Laura Ramos   July 27, 2023

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


Attachments

Appendix A: FY23 data of ILL and Scan & Deliver service, and Summit service from FY17-FY23.

Interlibrary Loan

	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
■ ILL Borrowing	31128	31224	24964	23899	21962	16598	23217
■ ILL Lending	11564	23348	20700	20974	17041	15157	13613
■ Scan & Deliver - Valley Patrons	16935	16378	8720	9138	5483	2521	4080
■ OREPUR Books				557	1543	313	374
■ OREPUR Ebooks				512	773	66	4

Summit
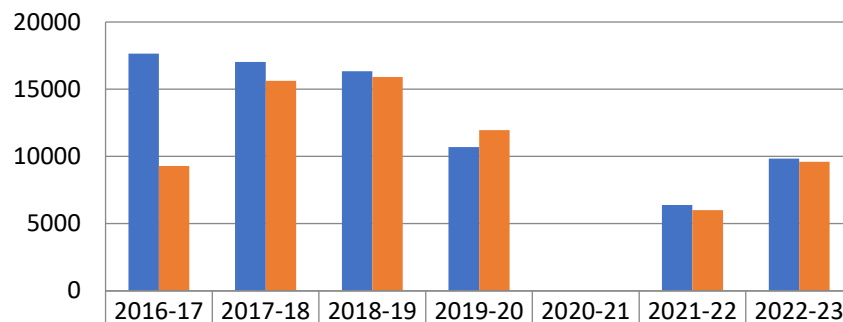
	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
■ Summit Borrowing	17641	17026	16331	10705	0	6394	9843
■ Summit Lending	9305	15621	15919	11970	0	6001	9609