

Assessment Annual Report



Oregon State University
Libraries and Press

Resource Sharing (ILL, S&D, Summit) Interlibrary Loan, Scan & Deliver, and Summit

The Resource Sharing unit's Interlibrary Loan team 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.
- **Summit:** Summit service lends and borrows physical materials to/from institutions that are members of the Orbis Cascade Alliance, a Pacific Northwest regional consortium.

Fiscal Year

The fiscal year starting July 1, 2023, through June 30, 2024 is covered by this report. It is noted as FY24 below.

Overview

Resource Sharing maintained consistent Borrowing, Lending, Scan & Deliver, and Summit services for FY24. Resource Sharing and Collection Maintenance teams supported and maintained a storage retrieval and reshelving service even with multiple collections moves, shifting projects, and staffing fluctuations happening both at Valley and at storage. The ILL team initiated an internal pilot of overdue fines and lost item forgiveness. Although not broadly or publicly announced, this internal pilot aids in removing financial barriers for patrons.

Summit services saw the implementation of overdue fines forgiveness at the start of the fall term. Similar to the ILL pilot of overdue fines and lost item forgiveness, the Summit pilot was also not broadly or publicly announced. In the forgiveness of overdue fines, the Summit team has been able to support the removal of financial barriers and looks to expand to lost item forgiveness in FY25.

Summit services also saw the implementation of a 12-week loan period, with a 6-week renewal. With the increase in loan period for all materials, Summit staff have seen a decrease in late renewal requests, troubleshooting problems related to renewals, and increased patron satisfaction that they can utilize Summit materials for a longer period of time.

Strategic Significance:

Interlibrary Loan, Scan & Deliver, and Summit services connects with Strategic Goal 1, "Emphasize High Quality Services and Expertise" in that they provide the OSU community with high quality resource sharing services and expertise in obtaining and borrowing

materials owned by institutions regionally and worldwide. By providing materials not owned by OSU, Resource Sharing staff are able to meet and impact the research, teaching, and learning needs of the OSU community. The ILL, Scan & Deliver, and Summit services also connect 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: Summit services saw an increase in loan period from a 6-week loan with one 6-week renewal to a 12-week loan with one 6-week renewal. This new loan period was implemented after discussion and decision by Alliance institutions in FY23.
 - It is important to note that the original implementation of Summit renewals happened in FY22. Prior to renewal implementation, Summit 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 6-week loan period and no renewals to a 6-week loan period with one 6-week renewal. In FY23, the Alliance agreed to increase the loan period from 6-weeks to 12-weeks with one 6-week renewal, with implementation in FY24.
- Takeaway 2: In Fall 2023, Interlibrary Loan and Summit services started an internal pilot program of overdue fines forgiveness. Additionally, Interlibrary Loan also started an internal pilot of lost item fines forgiveness. Although these pilots were not broadly nor publicly announced, they are putting Resource Sharing in alignment with local item forgiveness policies and equitable practices, which support core values of OSU Libraries.
 - It is important to note that with the Interlibrary Loan lost item forgiveness, new workflows were piloted, with successful and positive results. ILL Staff time regarding ILL overdues and/or lost items has been reduced, giving time for staff to focus on other tasks. Resource Sharing is anticipated to continue with fines forgiveness with a broader announcement this next fiscal year.
- Takeaway 3: Resource Sharing services experienced a retirement in ILL Borrowing in February 2024 and will be experiencing another retirement in ILL Lending in early FY25. With these retirements, the Resource Sharing team has been working on cross training to ensure coverage and continuity of service. The Resource Sharing team has also been rethinking and reimagining current workflows in addition to further expanding RAS student employee training opportunities. With RAS student employees supporting various tasks and workflows, it has allowed Resource Sharing staff time to focus on higher level coverage support planning and other work.
 - It is important to note that the Resource Sharing team also piloted a student leadership opportunity for the RAS student employees. The students in the leadership roles supported training other students on specific Resource Sharing workflows and tasks. This gave student employees professional development opportunities and allowed staff time to brainstorm new ways in which to approach current workflows and workflow spaces. With the retirement in ILL Lending happening in July 2024, Resource Sharing is expecting to continue reassessing workflows and assigned tasks, and broadening RAS student employee leadership and training opportunities.

Next Steps:

Next steps for the Resource Sharing unit include:

- Continue to build and strengthen additional cross training between Resource Sharing staff and student employees to better ensure coverage and continuity of service. This includes cross training and coverage support with off-site storage and the storage retrieval service.
 - This also includes encouraging Resource Sharing staff to think broadly and outside-the-box about ILL, Scan & Deliver, and Summit services, and their associated workflows. This broader reimagining of the services will help prepare Resource Sharing staff with changes they may encounter when they transition away from ILLiad.
- Prepare Resource Sharing staff workflows for transition from ILLiad to an alternative Resource Sharing program, such as Rapido. The transition away from ILLiad is most likely to happen this next fiscal year. It 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 create new documentation.

Assessment:

In preparing this assessment, I consulted with Resource Sharing staff, reviewed documentation, ILL and Summit workflow procedures, and Resource Sharing statistics.

Respectfully submitted,

Laura Ramos

August 15, 2024

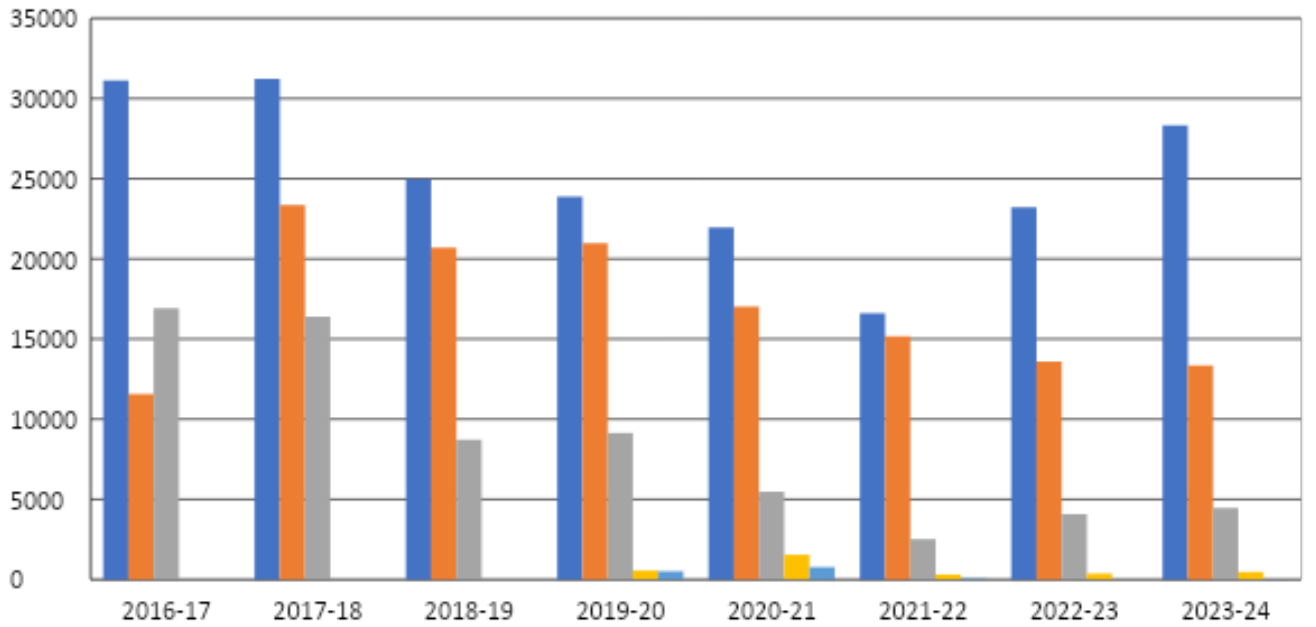
Signature of the person (or persons) who prepared this report

Date submitted

Attachments

Appendix A: FY24 data of ILL, Scan & Deliver, and Summit services from FY17-FY24.

ILL/S&D/OREPUR Yearly



Summit Yearly

