

Assessment Annual Report



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, 2020 through June 30, 2021 is covered by this report. It is noted as FY21 below.

Overview

FY21, ILL saw a lot of workflow modifications and shipping of materials. While the normal ILL model is to borrow materials from institutions, staff had to switch to a purchasing model. Since fellow institutions were closed and their physical lending services shuttered due to the pandemic, ILL staff had to find ways to still provide requested materials, and that included exploring avenues other than borrowing. Through this, ILL was able to utilize their Purchase on Demand process to model a full purchasing workflow. This included creating new queues and request routing. Even though staff switched to purchasing nearly everything, they continued to monitor the lending statuses of institutions to ascertain if they could borrow materials. Once materials were purchased, ILL even completed the ILS data entry lifecycle of those items.

With materials purchased and processed, Interlibrary Loan had to identify a way in getting those requested materials to patrons since the building was closed to the public, and materials could not currently be picked up from the hold shelf. The library closure allowed for Interlibrary Loan to establish a Home Delivery service, a temporary service that shipped out materials requested by OSU patrons.

During this same time, ILL was able to hire a LT2 that provided support in purchasing ILL requested materials and supporting Home Delivery service. ILL also supported the scanning of Course Reserve materials, and the transition of materials back to the hold shelf when the library began offering a pickup window service.

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: Interlibrary Loan switched to a purchasing model when everyone else closed down their ILL services. During the pandemic, when institutions shut down, including Summit institutions, ILL could not borrow, nor lend to or from institutions to fill requests submitted by OSU patrons. Additionally, Summit borrowing and lending services were completely turned off for all member institutions. Being that ILL was identified as an essential service during this time, ILL staff continued its service sans Summit, and switched to a purchasing model in which they purchased nearly every request that came through ILL’s processing queues. Physical materials purchased were added to the collections, and materials were scanned in order to continue meeting the learning, research, and teaching needs of the OSU community.
 - Since ILL requests were switched to purchases during this time, there is a noticeable decrease in ILL numbers when looking at FY21 ILL and Scan & Deliver statistics when compared to previous FY statistics. As noted above, the decrease in numbers is due to institutions closing, a lack of lenders filling requests during the pandemic, ILL having to switch to a purchasing model to fill requested materials, and Summit services fully stopping for all Alliance members.
 - OSULP’s ILL and Scan & Deliver service was one of the few ILL units nationwide that continued to operate fully on-site, processing and receiving physical materials to fulfill requests submitted by the OSU community. Many ILL units during this time filled requests using only electronic holdings and canceled physical loan requests. The fact that OSULP’s ILL unit pivoted workflows and continued processes seamlessly on-site is worth mentioning.

- Takeaway 2: Provided Home Delivery of materials requested/purchased. When everyone moved to remote teaching and learning, there was a need to get physical materials delivered to the patrons who requested them. With the library closing to the public, ILL staff pulled materials off of the hold shelf, and began a Home Delivery service. Through this service, the ILL unit used existing E-Campus and Remote delivery shipping workflows to incorporate materials that were to be delivered directly to patron's homes. With some modifications to the request form and the shipping workflow, such as giving patrons a field on the request form in which to supply an address, and a three-day window to verify the correct shipping information, the ILL unit was able to ship requested books, laptops, and small equipment to patrons.
 - In addition to providing the Home Delivery service, the ILL unit created a [Home Delivery FAQ webpage](#) for patrons that outlined common service questions and information.
 - The shipping of laptops was intended to be short-term; a temporary decision was made to ship laptops out to patrons that requested them. Laptops were shipped out via FedEx by the ILL and Scan & Deliver staff as part of the Home Delivery service.

- Takeaway 3: ILL supported Course Reserves scanning. With learning and teaching moving remotely, OSU students still needed access to course reserve materials. With the library closed to the public, the physical check out and short-term loans was

an impossibility. In order to continue providing OSU patrons with access to materials placed on course reserve, materials were pulled and scanned as appropriate. Being that the ILL unit had a workflow for quickly scanning and supplying article and chapter requests, the ILL unit teamed with LEAD staff to support the scanning of chapters, and in some cases, whole books, for temporary digital course reserve.

- Takeaway 4: Quarantine of returned materials. As the pandemic progressed, so did the recommendations on the quarantining of materials. The ILL and Scan & Deliver unit applied the recommendations from the [REALM Project \(REopening Archives, Libraries, and Museums\)](#) and OHA. This included setup of a quarantine space and the materials within, cleaning of tables and shelving utilized, the workflow to retrieve requested materials, and a returning/reshelving workflow. This workflow was piloted by ILL staff for incoming mail, and was similarly utilized by the LEAD department for materials returned via the return window and book drops. When new research and recommendations came forward, workflows were reassessed and modified, with quarantining of materials officially ending mid-April 2021.

Next Steps:

Some next steps for the ILL and Scan & Deliver unit include:

- Building in additional cross training between ILL staff to better ensure coverage and continuity of service. If there is interest and capacity, this could potentially include cross training of staff from other units or departments.
- Updating ILLiad web pages; this would make them accessible and mobile friendly. It would also update them to a more current layout that is user friendly.
- Begin investigatory work on alternative Resource Sharing programs, such as ReShare and/or Rapido to see what workflows and processes would be bolstered or need support if transition from ILLiad were to happen. New ILL program could potentially improve turnaround times and better streamline workflows.

Assessment:

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

Respectfully submitted,

Laura Ramos

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

March 3, 2022

Date submitted

Attachments

Appendix A: FY21 data of ILL and Scan & Deliver service, and Summit service from FY17-FY21.

