A Journey Through Interlibrary Loan – Trends, Technologies, and a Look to the Future

Katie Birch
Executive Director, Global Product Management
2016 YTD

WHEN BREATH BECOMES AIR
PAUL KALANITHI

ME BEFORE YOU
JOJO MOYES

TA-NEHISI COATES
BETWEEN THE WORLD AND ME

ALL THE LIGHT WE CANNOT SEE
ANTHONY DOERR

KRISTIN HANNAH
THE NIGHTINGALE

CRACKING THE CODING INTERVIEW
LETTI LAKKAMN-MCDOWELL

DARK MONEY
JANE MAYER

THE GIRL ON THE TRAIN
PAULA HAWKINS

ELENA FERRANTE
MY BRILLIANT FRIEND

"A beautiful story that captivates, with a story that is peopleized." — Daily Mail, The New Statesman

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LIBRARY TRENDS
LIBRARIES ACHIEVE EQUILIBRIUM BETWEEN DIGITAL AND PRINT AS BUDGETS FLOWNDER
THE LIBRARY RESOURCE GUIDE BENCHMARK STUDY ON 2016 ACADEMIC LIBRARY SPENDING PLANS

By Joseph McLandress, Research Analyst
Produced by Unispher Research, a division of Information Today, Inc.

2016 Library Market Size, Share, Forecast, and Trends

Market Performance
Advancing the Business of Information
May 5, 2016
Key trend 1 - Shift in purpose

Service centered rather than content centered environments

- Outsell report - 2016 Library Market Size, Share, Forecast, and Trends
Academic libraries
To meet user needs, academic libraries have been transitioning from a content focus to a service focus. A stronger emphasis on service and the user experience will shape academic library investment, and in time we expect this to lead to rethinking the physical library spaces.

Public libraries
The reinvention of the public library sector continues as many reposition themselves as tech centers, “idea stores,” and cultural and community spaces. Content budgets face pressure as libraries invest in technology and repurpose their physical space.

- Outsell report - 2016 Library Market Size, Share, Forecast, and Trends
SHIFTING ILL?
### Book clubs

#### Borrowing Requests: Linked Requests (16)

- Renewal requested for request 165028750 with a desired due date of 05/19/2016

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<th>ID</th>
<th>Status</th>
<th>Media Type</th>
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<th>Patron</th>
<th>Lender</th>
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<th>Referral Date</th>
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Results 1 - 5 of 5

Rows | 10 ▼
Shared print model

1. Define the group or entity
2. Review reconsider renew
3. Access
4. Discovery
5. Weed? Preserve?
6. Output to Local System
7. Register retention commitments
8. Decision support
9. Allocate retention commitments
10. Analyze collection data
11. Input Local Data
12. Collection data
13. Analyze collection data
Shared Print and ILL workflows?

- Interested in working with OCLC to develop and validate ILL requirements?
- Contact Nick Valentini valentin@oclc.org
Immediacy

“Millennials, by their own admission, have no tolerance for delays.”

Sweeney, 2006
Our traditional model was one in which we thought of the user in the life of the library…

… but we are now increasingly thinking about the library in the life of the user.

Connaway 2015, Dempsey 2015
End user request form prototype
Key trend 2 - Transition from p-e

Outsell’s 2015 Information Management Benchmark survey found that, on average 77% of 2015 content budgets were allocated to digital content, and respondents expected that to increase by two points in 2016. But buying and delivering content is not enough.

Average print spend = 23%

- Outsell report - 2016 Library Market Size, Share, Forecast, and Trends
“Fully 80% of young adults read a book, compared with 71% of those ages 30 to 49, 68% of those 50 to 64 and 69% of those 65 and older.”
History of OCLC ILL

- April 1, 1979: Interlibrary Loan (ILL) Subsystem debuts
- 1980: Holding Symbols display by state or region
- 1984: ILL Micro Enhancer introduced
- 1985: University of Maryland at Baltimore Health Sciences Library dumps their card catalog
- 1986: GAC begins
- 1990: PRISM platform introduced
- 1991: FirstSearch debuts
- 1993: ILL Link to FirstSearch becomes available
- 1995: ILL Fee Management (IFM) introduced; ILL Custom Holdings made available
- 2000: ILLiad software made available
- 2013: WorldShare ILL introduced
The evolution of the interface

1979

1996

2001

2005

2013
FirstSearch Catalog Document Ordering/ILL System wins CLIPS Award

The FirstSearch Catalog Document Ordering/ILL system has been named winner of the 1994 Computers in Libraries Information Product/Service (CLIPS) Award, which was presented March 1, 1994 during the Computers in Libraries Conference in Washington, D.C.

The document ordering and interlibrary loan system makes loans located in FirstSearch databases available for delivery quickly and inexpensively. The FirstSearch Catalog, OCLC's online reference service designed for library patrons, was the 1993 CLIPS Award winner.

A panel of five judges, representing different types of libraries from around the country, named the winner. In a review of The FirstSearch Catalog Document Ordering/ILL System, one of the judges stated: "With practically all libraries weighing the options of canceling serial subscriptions versus document delivery solutions, this service deserves recognition. It represents a timely implementation of relevant technology that meets a growing need in the library community."

Dan Marnon, assistant professor and head, library systems department,Edison Low Library, Oklahoma State University, was chair of the judges panel. Mr. Marnon presented the award to Katherine Blauer, OCLC national sales director.

"OCLC is proud to accept this prestigious award," said Ms. Blauer. "With the new document delivery options and ILL link to The FirstSearch Catalog, OCLC is helping libraries to deliver fast, reliable, and cost-effective document ordering and interlibrary loan services to their patrons. OCLC is committed to furthering access to the world's information, and we appreciate this recognition of delivery, overnight mail, and first-class mail. FirstDoc, the newest document ordering option on FirstSearch, provides fax delivery in one hour or less of articles found in the serial databases. Article First and Periodical Abstracts.

The FirstSearch ILL system lets library patrons fill out loan requests electronically through a link with OCLC's PERN ILL system. Already verified, these requests are then transmitted to the library's ILL review file, eliminating the need for staff to relay the requests from a local system.

The CLIPS Award is sponsored by Computers in Libraries, a journal for library, public, and special librarians, information managers, technical information specialists, and information scientists. Computers in Libraries is published by Meckler Corporation, sponsor of the Computers in Libraries Conference.

OCLC products and services have won awards at the Computers in Libraries Conference for the last three years. In 1992, The FirstSearch Catalog received the Computers in Libraries Information Product/Service (CLIPS) Award as the most innovative and effective Information product or service of the year. In 1993, the Meckler Internet
WORLDCAT DISCOVERY AND FIRSTSEARCH TODAY
Help users find and get resources from your library and libraries worldwide through a single search of WorldCat and familiar, authoritative e-content collections. It makes your collections visible on the Web.
FirstSearch today
“they want WorldCat to still be ‘the other place you find books that aren't available in our library’”

“WorldCat is our Bible.”

“Rich, transparent, and authoritative”

“Rare books people are beside themselves at the thought of having to use a discovery tool rather than FirstSearch.”

“What is great about FirstSearch is all of that information - lots of data - can be complicated and sometimes overwhelming but that is what gives FirstSearch its value.”
# Services meet different user needs

<table>
<thead>
<tr>
<th>Designed For</th>
<th>FirstSearch</th>
<th>WorldCat Discovery</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Primarily Experts</td>
<td>Primarily Non Experts</td>
</tr>
<tr>
<td></td>
<td>Some Non Experts</td>
<td>Some Experts</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Problems</th>
<th>FirstSearch</th>
<th>WorldCat Discovery</th>
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</thead>
<tbody>
<tr>
<td>What do other libraries have?</td>
<td>WorldCat</td>
<td>WorldCat + central index (articles)</td>
</tr>
<tr>
<td>Support for library workflows (reference, ILL, collection dev)</td>
<td>Detailed meta-data on results</td>
<td>De-cluttered interface</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tools to solve Problems</th>
<th>FirstSearch</th>
<th>WorldCat Discovery</th>
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<tbody>
<tr>
<td>WorldCat</td>
<td>Pre-search refinement</td>
<td>Post-search refinement (facets)</td>
</tr>
<tr>
<td>Detailed meta-data on results</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pre-search refinement</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Tools used by ILL staffs

- WorldShare ILL/Discover Items: 75%
- FirstSearch: 41%
- Other tools: 24%
- ILLiad: 21%
- WorldCat Discovery: 17%

Most-mentioned other tools:
- Google/Google Scholar
- WorldCat.org
- Amazon
New transition path

Current Products

FirstSearch

WorldCat Local

Future Products

FirstSearch

WorldCat Discovery
Stats.oclc.org

- 29 reports today (20 individual library + 9 group)
  - IFM Program borrower
  - Borrower activity overview
  - Borrower resource sharing stats report
Want to be involved?

- Interested in working with OCLC on statistics, data and assessment for ILL?
- Contact Tony Melvyn melvynt@oclc.org
Rules of Engagement

- Lender can refund any request that has been shipped and charged for with IFM
- Only the full charge amount can be refunded
- Once a charge or refund has occurred, no further charges or refunds can be actioned on a given request
**Refund**

You will refund 7.77 USD to NDCLV. This action can not be undone.

- **Refund**
- **Cancel**
IFM refund has been queued for processing

Request Details (Request ID 79475246)

Ship to
Attention: Mr. FM
Address: ST Line 1
City: Dublin
State/Province: Ohio
Country: US
Postal Code: 43217

Ship Via: Regular Mail
Max Cost: $0.99 USD

Bill to
Address: BT Line 1
City: Columbus
State/Province: Ohio
Country: US
Postal Code: 43234
### Lender History

**Lending Information**

<table>
<thead>
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<th>Item</th>
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<tbody>
<tr>
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<td>STLine2</td>
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<tr>
<td>City</td>
<td>Dublin</td>
</tr>
<tr>
<td>State/Province</td>
<td>Ohio</td>
</tr>
<tr>
<td>Country</td>
<td>US</td>
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<tr>
<td>Postal Code</td>
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**Ship Via**

<table>
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<tr>
<th>Item</th>
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<tr>
<td>Max Cost</td>
<td>IFM - 9.90 USD</td>
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<tr>
<td>Bill to</td>
<td>Regular mail</td>
</tr>
<tr>
<td>Address</td>
<td>STLine 1</td>
</tr>
<tr>
<td>City</td>
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<tr>
<td>State/Province</td>
<td>Ohio</td>
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**Request History**

#### ILL Fee Management (IFM) History

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<tr>
<th>Date</th>
<th>Transaction</th>
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<tbody>
<tr>
<td>2016-02-12</td>
<td>IFM Payment - 7.77 USD</td>
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<tr>
<td>2016-02-12</td>
<td>IFM Refund - Pending</td>
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</tbody>
</table>
### Lender History

**City**: Dublin  
**State/Province**: US  
**Country**: US  
**Postal Code**: 40217

**Bill to**  
**Address**: BT Line 1  
**City**: Columbus  
**State/Province**: US  
**Country**: US  
**Postal Code**: 43224

**Lending Information**  
**Use ILL Fee Management (IFM)**: 
**Lending Charges**: 7.77 USD  
**Invoice Amount**: 7.77 USD  
**Lending Notes**:  
**Lending Restrictions**:  
**Return Via**:  

#### Request History

**ILL Fee Management (IFM) History**

<table>
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<tr>
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<td>IFM Payment - 7.77 USD</td>
</tr>
<tr>
<td>2016-02-12</td>
<td>IFM Refund - 7.77 USD</td>
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</tbody>
</table>
**Borrower history**

**ILL Fee Management (IFM) History**

<table>
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<tr>
<td>2016-02-12</td>
<td>NDT7P</td>
<td>IFM Refund - 7.77 USD</td>
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OCLC’s TECHNOLOGIES: UNPRECEDENTED IN OUR INDUSTRY

SPEED
- Throughput in our new Dublin Data Center
  - Software Development
  - Solid Releases
  - Faster features to market

STRENGTH
- ISO 27001 Certified
  - High Availability
- Independent Certified Public Accounant Service Organization Audit (SSAE-16 SOC 1)

AVAILABILITY
- Industry best technologies- fit for OCLC and our libraries
  - Network, Compute, Storage
  - MTRS Beyond Competitors

SCALE
- Sized Specifically fit for OCLC
  - Network, Compute, Storage
  - MTRS Beyond Competitors
  - “Plug and Play” Growth Ready-Challenge US!
  - Integrated Security

RESILIENCY

Worth Noting: OCLC is aligned with U.S. Security compliance for Federal Information Security Management Act (NIST SP 800-53)
Together we make breakthroughs possible.
Advisory council and early adopters
Katie Birch
birchk@oclc.org

Stats.oclc.org
melvynt@oclc.org

Shared Print
valentin@oclc.org