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Jeffrey M. Mortimore
Georgia Southern University, jmortimore@georgiasouthern.edu

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Improving Library Discovery: Assessing Practices with the ODI Conformance Checklist for Libraries

Jeffrey M. Mortimore
Georgia Southern University

Abstract

The ODI Conformance Checklist for Libraries provides a structured and practical tool for libraries to assess and improve their discovery practices, ultimately leading to a better user experience for library patrons. Employed as an assessment tool, the ODI Checklist supports self-assessment, vendor assessment, benchmarking, and continuous improvement. As such, technical service units will benefit from repeating the checklist regularly over time.

This poster presents the ODI Conformance Checklist as an internal assessment tool and highlights ways in which we are using its findings to identify and prioritize improvements to discovery workflows and practices.

What is the ODI Conformance Checklist?

Supported by the National Information Standards Organization (NISO), the Open Discovery Initiative (ODI) aims to define standards and best practices for library discovery services using indexed search.

As part of this work, the ODI publishes Conformance Checklists for vendors and libraries to "take specific measures to assert their conformance" with the recommended practices outlined in NISO RP-19-2010, Open Discovery Initiative: Promoting Transparency in Discovery. Libraries are encouraged to publish their conformance checklists with the ODI.

Recommended Practices

1. If using the Conformance Checklist as an assessment tool, plan to complete a new form annually for the first few years.
2. Interpret each recommendation broadly to account for the full range of discovery service activities that you want to assess.
3. If you are a member of a consortium, think about how consortial and library services overlap and interact.
4. Include the Conformance Checklist in your accreditation reports!

The ODI Conformance Checklist is intended to be an internal assessment tool that can be used to identify and prioritize improvements to discovery workflows and practices.

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For each recommendation, libraries indicate whether their services conform to the full ODI conformance. Libraries are encouraged to include comments on their conformance status.

Besides asserting conformance, the checklist can help to assess libraries' current practices and identify opportunities for improvement.

Georgia Southern completed its first checklist in spring 2013. We intend to update our checklist annually, then develop goals to improve our conformance.

Areas for improvement include:

• Planning and documenting system changes
• Auditing configurations and settings
• Monitoring system statuses and release notes
• Monitoring activity in online communities
• Encouraging discussion about discovery services among colleagues

In response, we developed the comprehensive policy: Guidelines for Management of Unaudited FAAD, Non-FAAD, and Hybrid Electronic Resources in the Libraries’ Collections, which includes guidelines for maintaining these activations in both systems. We are currently updating or developing new audits to ensure that the guidelines are met on a regular schedule.

The ODI Conformance Checklist is available for download at the NISO ODI website.

Step 1: We are currently building a library of system status, release, forum, and support information on our departmental intranet for our vendors.

Reporting will occur primarily through an existing LibAnswers queue, which we use for troubleshooting and enhancement requests. Updates can be addressed by Collection Services personnel directly from the queue.

Encourage Discussion about Discovery Services Among Colleagues

Our 2013 Checklist revealed that we were not auditing our discovery service configurations consistently. While we maintain audits that result in changes, we did not have overarching guidelines to ensure that we have the audits we need or that these audits are coordinated. At the same time, we wanted to clarify policies related to activating freely accessible and open access (FAAD) resources in our discovery layer (EDS) and catalog (Primo V7).

In response, we developed a Discovery Advisory Committee (DAC), which includes representation from across the libraries and is charged with using user interface (UI) and user experience (UX) issues related to the discovery layer, online public access catalog, link resolver, and the Libraries’ other resource discovery platforms, tools, and supports. The purpose of the DAC is to identify priorities and discuss strategies for improving the usability of these resources.

The DAC has no decision-making authority; all findings and recommendations are referred to the appropriate Libraries department or committee for further review.

The DAC maintains a log of topics they discuss, including information about referrals.