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

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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-18 full-text search service for libraries.

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.

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!

Improve Documentation of Configuration Decisions and the Reasons Behind These Decisions
Our 2013 Checklist revealed that we did not have a consistent method of logging changes to our discovery layer (CLP), link resolver (Alma), authentication layers (OpenAthens, EZProxy), or other discovery tools. While many configuration changes were mentioned in existing ticketing queue for troubleshooting and enhancement requests, this information was difficult to search and inconsistently recorded.

In response, we created an internal list of tools via Google Groups. Listeners' members email updates to the listers using a standard email template. Messages are preserved as searchable conversations, then members can add additional comments as needed. These are preserved after members leave the institution, providing a permanent change log for future listeners.

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Georgia Southern’s Checklist

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Improve Auditing of Configurations and Settings
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 frequently used and open-access (FAOA) resources in our discovery layer (EDS) and catalog (Primo VE).

In response, we developed the comprehensive policy: Guidelines for Management of Unlicensed FADA, OpenFADA, 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.

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Improve Monitoring of System Statuses, Release Notes, and Forums
Our 2013 Checklist revealed that we were not consistent with reading and acting on official documentation, announcements, and updates. While personnel individually monitor documentation, listservs, and forums, this effort is not coordinated. This can sometimes result in missing or updating configurations late, and missing enhancement opportunities.

Addressing this issue will require several steps. First, we are building a library of system status, release, forum, and support information for our vendors on our intranet. Second, we will identify relevant notification services (e.g., email system status notifications). Third, we will assign to appropriate personnel responsibility for monitoring and reporting on these sources.

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Improve Discussion about Discovery Services Among Colleagues
Our 2013 Checklist revealed that our engagement with library personnel outside the Collection Services department could be stronger. While some discussion occurred among Libraries’ Collection Development Committee, this setting was not appropriate for reviewing discovery service settings, or other discovery-related topics.

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.