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Choosing the Right Discovery Tool: Making a Discovery Task Force Function Effectively

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CHOOSING THE RIGHT DISCOVERY TOOL

Making a Discovery Task Force Function Effectively

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APPOINTMENT OF TASK FORCE

Dean of Library appointed head of Discovery Task Force

Head of Task Force submitted recommendations for membership to Dean

Attempt to involve all departments & to include those with skills needed

Some changes made at department head level

Initial meeting held September 20, 2011

Beta implementation ready for Spring 2012

Full implementation scheduled for Fall 2012

DISCOVERY TASK FORCE MEMBERS

Coordinator of Cataloging & Metadata – Head

Coordinator of Continuing Resources

Coordinator of Content Management

Assessment Officer

Information Services Librarians (3)

Systems Librarian

Head of Access Services

Staff Assistant (Cataloging)

Total: 3 technical, 1 assessment, 3 reference, 1 systems, 1 access, 1 staff

LIBRARY DEAN'S CHARGE

"The task force is asked to examine the various discovery tools on the market and recommend to the Library faculty which product(s) appears to best suit our needs. If the task force believes it is feasible to complete its work in time for us to implement the selected tool in time for Spring Semester 2012, great. But we should definitely strive for implementation no later than just before Fall Semester 2012."

Dean Bede Mitchell
Georgia Southern University

FIRST STEPS

Educated ourselves about products & capabilities

- Some members had basic knowledge from attending conferences & prior vendor demonstrations

Conducted Review of the Literature

- Developed & distributed recommended reading list

Adapted list of "What to Consider When Evaluating Discovery Tools" from Library Journal, March 15, 2011

- Basic list of what to look for in Discovery Tool evaluation
- Provided a basis for comparing services

FACTORS TO CONSIDER

EBSCO EDS, PRIMO, WorldCat Local, Summon

Content
- What does it include or index?
- How good is the metadata?

Search
- Is the interface easy to use?
- Are the results as expected?
- How does the relevancy ranking perform?
- Is it easy to navigate the results?

Best Fit
- Do we have staffing required to implement?
- What will vendor do?
- What does it cost?
- What are plans for future of product?

GETTING GROUP IN FOCUS

Discovery takes some adjustment for librarians

Questions from Task Force members

- Should we invest now or wait for improvements to product?
- What will happen if Discovery System is selected at state level?

Discussed target audience or user group with greatest need

- Novice users (whoever they may be)
- More undergraduates than other user groups
- Online students who do not come to campus

Discovery Service would be an addition to existing services

Experienced users will benefit but need is less critical

DOWN TO BUSINESS

Work to be short in duration but intense

Basic understanding of Discovery Tools

Assignments for various tasks

RESEARCH & DOCUMENTATION

Scheduled demonstrations with 4 major vendors

- Sales pitch
- Standard list of questions
- Set up trial sites if available

Viewed library sites for each service

- Branding
- Web page interface

Compared facets or limiters

- Including local options

Compared advanced search features

- How intuitive?

RESEARCH & DOCUMENTATION

Database coverage

- Differences in coverage and metadata
- Looking for best match
- Constantly changing

Usability and case study summaries

- Few in fall 2011
- Most noncommittal

Similarities and differences

- Summarized our findings
- Strong/weak points
- Unique features of each service
- Deal Breakers
- Cost revealed after all research completed

USER EVALUATIONS

Feedback from students, faculty, and staff

Conducted same searches in each of 4 services & compared results, interface, overall experience

[Student results](#) were most revealing

- Not a scientific study
- 10 students – library assistants
- Used work time to complete evaluations
- All took task very seriously
- No collaboration with other students
- Good feedback & opinions
- Two of four services were clear front runners
- One of the four services was not selected by any students

MOST REVEALING FINDINGS

All 10 students were given the same information, same evaluation tool, & same instructions including option to email or visit a specific person for help as needed.

- All 10 students successfully completed the evaluation.
- None of the 10 asked any questions or for assistance.
- All 10 students gave positive feedback regarding Discovery Services.

STUDENT COMMENT

"This type of "Google-like" service would benefit Georgia Southern students because it simplifies the search process by searching a large number of databases simultaneously, eliminating the need to identify file formats and databases and widening the search to include potentially unknown resources. Students use the Google search engine because of its simplicity and ability to identify the most relevant results, and a Discovery Service may offer a similar experience and become the go-to search resource for academics."

Graduate Student, Accounting

STUDENT COMMENT

"Yes, this would greatly benefit students as it makes research much more simple compared to what we have right now. All information can be easily brought to you as you can filter what you need or don't need."

Senior, Biology

STUDENT COMMENT

> " Absolutely. It is user-friendly with useful, well-organized results."
> Part-time, Accounting

STUDENT COMMENT

"I think students would benefit from the simplicity and straight-forwardness of this search engine."

Sophomore, Political Science & Spanish

STUDENT COMMENT

"Students at Georgia Southern would definitely benefit from a service like this. It can be so confusing to try to use Galileo. You have to go through databases or alphabetical journals and try to find what you're looking for. The times that I have attempted to use Galileo; I was unable to find things that really related to my research paper. Students in our generation are used to using things like Google and being able to just search for an item and have everything we need in once place."

Senior, Accounting

STUDENT COMMENT

"I do believe that this type of service would benefit Georgia Southern University. I believe it to be beneficial that the program searches through all of the databases and catalogs at the same time. It is a very convenient time saver on everyone's part. It will provide the students an easy way to search through mountains of data. The service I believe will also be beneficial to the Library Staff as a whole and the Reference Librarians in particular because it will eliminate many previously tedious steps to find results relevant to a student's interest. I believe that it will help to maximize the time spent with students and provide an easy way for them to learn to search on their own."

Senior, Philosophy & Theatre

STUDENT COMMENT

"This would benefit Georgia Southern because most students are not exactly Galileo savvy. Most students want to simply type in the key things they're looking for and find relevant materials. This "Google-like" method is very user-friendly."

"Students who have not spent a lot of time needing to research in the past would benefit from this the most. Also, students who are strapped for time would appreciate this service. There's no need to seek help for use of this service because it's all very self-explanatory."

Sophomore, Chemistry

FINAL STEPS IN DECISION MAKING

Made a presentation of findings to Information Services Department

Submitted Final Report to Dean

Made presentation to library faculty

TIPPING POINTS IN SELECTION

EBSCO Discovery Service

- Known entity
- Familiar interface
- Coverage of database content
- Rich metadata – EBSCO & Wilson databases
- Provided beta test site to try out service
- Vendor service: implement & customize
- Subject pages to imbed throughout campus
- Comparable cost
- Relevancy ranking
- Free on site training

MOST IMPORTANT= interface, content, and relevancy rankings

PROBLEMS TASK FORCE FACED

Initial lack of knowledge of Discovery Services

Moving from traditional points of view regarding searching

- Large results sets
- Discovery vs. Search

Tendency to over-analyze search results

Questions

- Should we wait until services are more developed?
- Should we wait until GIL/GALILEO chooses a Discovery Service?
- Do we have staff to implement?
- How difficult will it be to change to a different Discovery Service?

TEACHING AND MARKETING

Training

- Library Staff Training
  - EBSCO provided in-house training
  - Presentation to Library Committee
  - Training for Library Faculty & Staff – Library Day
- Student Training – Fall 2012
  - Training materials
  - Classes
- Faculty Training
  - Liaisons

Marketing Plan in the Works – Planning Stage

- Kickoff for Fall 2012
- Subject interfaces with faculty
- Awareness campaign on campus
- Web page usability testing

WORKING WITH VENDORS

Collecting Info for the Taskforce

INFORMATION WE NEEDED

Pricing

- Not given to the taskforce during the evaluation period
- Collected at the beginning of the process
- Prone to changing due to discounts and other offers
- Looked at implementation fees as well as on-going costs
- Length of contract

Vendor Demos

- Librarian Evaluation Surveys, ex.
- Chance to judge each product
- Content, Search, Best Fit

Conference Calls and WebEx Demos

Knowledgebase Content

Trials

HOLDINGS COMPARISONS

OCLC Worldcat Local

- Since we use WorldCat, they already had our holdings.
- Compared our holdings to their knowledgebase using the downloadable "Databases and Collections" list available on the website.
- http://www.oclc.org/worldcatlocal/overview/content/dblist/default.htm

Summon

- Compared our holdings to their knowledgebase using their online "Key Databases & Packages", "Participating Publishers", and "Serials Titles" lists.
- http://www.serialssolutions.com/en/services/summon/content-and-coverage/

EBSCO Discovery Service

- EBSCO ran an EDS E-Resources Analysis report for us.

Primo Central

TRIALS

WorldCat Local

- KB included the catalog, MLA International Bibliography, Wilson Education Abstracts, and Academic Search Complete
- Authenticated by IP
- We had little control of the appearance of the user interface.

EDS

- KB included the catalog and all EBSCO databases.
- Originally authenticated by password but eventually authenticated by IP
- We were guided in the design of a branded interface.

JUDGING VENDOR SUPPORT

Timeliness of response

Turnaround time on changes

Ease of using administrative interface (if applicable)

Ease of updating holdings

Courtesy of support staff

Cost

TURNING THE EDS TRIAL INTO A BETA

Added the Institutional Repository to the Knowledgebase

Positioned an EDS search box on the library's homepage

- http://library.georgiasouthern.edu/test-lib/

Selected all of the resources we subscribe to that are available in the EDS to the Knowledgebase

Selected the resources for integrated search

Changed the default search setting to "Available in Georgia Southern Library (Print & Online)" instead of everything

THANK YOU!

Any questions?