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

Ruth L. Baker
Georgia Southern University, rbaker@georgiasouthern.edu

Rebecca Hunnicutt
Georgia Southern University, rhunnicutt@georgiasouthern.edu

Natalie Logue
Georgia Southern University, nlogue@georgiasouthern.edu

Jessica Rigg
Georgia Southern University, jminihan@georgiasouthern.edu

Author ORCID Identifier: 0000-0003-3708-866X

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Embrace the Hive Mind: Engaging ILL and Research Services in Unsubscribed and OA Content Discovery

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

Ruth L. Baker, Georgia Southern University, rbaker@georgiasouthern.edu

Rebecca Hunnicutt, Georgia Southern University, rhunnicutt@georgiasouthern.edu

Natalie Logue, Georgia Southern University, nlogue@georgiasouthern.edu

Jessica Rigg, Georgia Southern University, jminihan@georgiasouthern.edu

Abstract

Deciding whether to support discovery of unsubscribed and open access (OA) content raises questions for technical and public services librarians, from the philosophical to the pragmatic. Doing so requires careful curation and monitoring of resources, and benefits from library-wide input. This paper describes the process at Georgia Southern University for vetting unsubscribed and OA resources with ILL and liaison librarians for inclusion in the discovery layer and on the A–Z database list. For the discovery layer, this involves a three-step evaluation of collections for overall metadata quality, likelihood of ILL fulfillment, and value to the library collection. For the database list, this involves an evaluation of how liaison librarians integrate sources into reference and instruction. In each case, technical services, ILL, and liaison librarians weigh in on whether unsubscribed and OA content merits inclusion in the library collection. Furthermore, ILL and liaison librarians play a critical role monitoring these resources for continued inclusion and support.

Introduction

Over the past decade, academic libraries have benefited from two significant trends, a growing wave of interest in open access (OA) and open educational resources (OERs), and the opening of metadata sources for more flexible representation of subscribed and unsubscribed content in library collections. Together, these trends raise important questions about the scope, discovery, and delivery of collections that transcend technical and public services roles. On the one hand, discovery layers like EBSCO Discovery Service and ExLibris Primo have achieved a maturity and sophistication that allows librarians to custom-fit collections to stakeholder needs, including representing relevant unsubscribed and OA content in the discovery layer. On the other hand, librarians must decide what OA and non-full-text databases to support through the A–Z database list, library website, and other content management systems. According to a recent survey of academic librarians by Bulock, Hosburgh, and Mann (2015), 89% of 150 respondents indicated that "the time and effort involved in providing access to OA resources" is "valuable to some degree" (p. 84). However, as Shelton et al. (2015) argue, libraries need to "develop guidelines for reviewing and selecting open resources," a key strategy for which is "using both quantitative and qualitative measures for assessing the [OA resources] being offered, to ensure the value of the resources and as an evidence based means to deselect" (p. 345). In other words, including OA resources requires careful curation and monitoring, and benefits from library-wide input.

Since late 2015, the Georgia Southern University Libraries have taken a library-wide approach to these tasks. Together, technical services librarians review unsubscribed and OA resources with Interlibrary Loan (ILL) and liaison librarians for inclusion in the discovery layer and on the A–Z database list. For the discovery layer, this process includes a three-step evaluation of collections for overall metadata quality, likelihood of ILL fulfillment, and value to stakeholders and the library collection. For the database list, this involves evaluating how liaison librarians integrate these sources into reference and instruction. In each case, technical services, ILL, and liaison librarians weigh in on whether specific unsubscribed and OA content merits inclusion in the collection. Subsequently, ILL and liaison librarians help to monitor these resources for continued inclusion or removal. This paper presents Georgia Southern's processes for maintaining unsubscribed and OA resources in the discovery layer and A–Z database list.

Managing Unsubscribed and OA Content in the Discovery Layer

Since adopting EBSCO Discovery Service (EDS) in 2013, librarians at Georgia Southern have generally supported including records for unsubscribed and OA resources in the libraries' discovery layer, Discover @ Georgia Southern. EDS makes this possible by allowing libraries to enable unsubscribed and OA metadata collections and related custom links, and either include or exclude this content from the default search result using the "Available in Library Collection" (AiLC) facet. Georgia Southern's instance is configured to exclude unsubscribed content from the default search result, requiring that the AiLC facet be removed to surface these results. This configuration was agreed upon by the librarians when EDS was adopted so that users could choose whether to expand their results to include unsubscribed content following their initial search. All records to unsubscribed and OA content include a direct link to ILLiad, the libraries' ILL management system, as well as access to ILLiad through the libraries' link resolver.

After a fair amount of experimentation with enabling and disabling OA and unsubscribed content, it became clear that not all metadata collections are created equal, and not all requests for unsubscribed and OA resources can be filled. In late 2015, the library faculty adopted formal procedures to evaluate and approve what content should be enabled in EDS. Over time, these procedures have been refined to include prescreening for predictors of success and streamlined voting by all librarians. First, the libraries' Discovery Services librarian collects and monitors EBSCO's content update e-mails, which announce new metadata collections as they become available to enable in EDS. Once a sufficient number of new collections become available, usually 5 to 15, the Discovery Services librarian enables these collections and any associated custom links in the libraries' production profile of EDS, then schedules a meeting to review these resources for metadata quality and likelihood of fulfillment with Cataloging, Continuing Resources, and ILL personnel. During this meeting, participants prepare recommendations for whether each collection should remain enabled.

When looking at potential new metadata sources from an ILL perspective, the main concerns center around the ability for the metadata to migrate into an ILLiad request form and the likelihood of being able to fulfill that request through ILL. Some materials, such as surveys, questionnaires, and test metrics, are quickly

rejected as ILL requests because they are rarely published and not usually cataloged in a way that makes ILL borrowing possible. Others may include narrowly curated materials that are only held by the company providing the metadata. In this case, it depends on whether ILL personnel can verify the company as an ILL lender, and if the materials are viable for borrowing. Subscription-based electronic encyclopedias are a surprising example of this, as individual entries as well as the database hosting them are not cataloged, leaving no way for the ILL office to identify potential lenders. The lending copyright for some resources is also a consideration, but since it can be negotiated by each institution, it is rarely a significant factor.

After the meeting participants prepare their recommendations, the Discovery Services librarian prepares and distributes a survey to the liaison librarians requesting feedback on whether each collection should remain enabled. For each collection, the liaisons are provided with a description of the collection, the number and full-text availability of records, an evaluation of the likelihood of fulfillment if records are requested through ILL, and the meeting participants' recommendation of whether each collection should remain enabled (see Figure 1).

Generally, liaisons are given three weeks to search EDS, evaluate results for each collection, and complete the survey. Collections are tested in the libraries' production profile of EDS so that the liaisons can see how results will look alongside the libraries' other enabled content. The liaisons are asked to evaluate the quality and relevance of the resources to the collection and their liaison areas, and whether they are appropriately relevance-ranked relative to other enabled resources. Liaisons who claim a unique content area or overlap with a specific collection are able to weight their vote.

Liaisons receive several reminders prior to the survey close date, and most liaisons elect to participate. Most liaisons vote according to the Cataloging, Continuing Resources, and ILL personnel's recommendation for each collection. However, given their subject expertise and prior awareness of the resources under review, liaisons' recommendations to enable or disable collections occasionally diverge from the provided recommendation. Following the survey close date, the Discovery Services librarian compiles the liaisons' responses and prepares an agenda item with final recommendations to enable or disable each collection under review for approval at the next

Discover Database Metadata Source Previews - Aug/Sept 2019

ADEAC

ADEAC (A System of Digitalization and Exhibition for Archive Collections) is a cloud-based database system operated by TRC-ADEAC Inc. ADEAC offers searching and browsing of various Japanese materials. All EDS customers may search the ADEAC metadata, but only subscribers may access the full text on the ADEAC platform.

Total Unfiltered Results: 73,619
English Language Results: 397 (mostly Japanese)
Full Text Available in Library Collection: 0
Full Text Visibility: N/A
EDS Custom Link: N/A
Metadata Support for ILLiad: Very Poor
Likelihood of ILL Fulfillment: Very Unlikely

eTeam/ILL Consent Agenda Recommendation: Disable

ADEAC
All liaisons, please indicate your preference here.

○ Enable

○ Disable

Liaison Preference
Please further weight your preference if a significant portion of this database's content is highly relevant to one or more of your assigned liaison areas. Otherwise, leave this item blank.

○ Enable

○ Disable

Comments

Your answer

BACK   NEXT

Never submit passwords through Google Forms.

Figure 1. Screenshot of liaison survey item.

Recommendations for Consent Agenda:
August/September Discover Database Trials

C&RS, September 19, 2019

Following are recommendations for enabling or disabling databases trialed in Discover during August and September 2019. Recommendations are informed by liaisons' survey feedback and ILL's evaluation of the likelihood that requests originating from these databases reasonably could be fulfilled.

ADEAC   Recommendation: **Disable**

- 100% of liaisons (n=10) support disabling
- 100% of liaisons with strong content-area overlap (n=2) support disabling

ARC REPORTS   Recommendation: **Disable**

- 70% of liaisons (n=10) support disabling
- 100% of liaisons with strong content-area overlap (n=1) support enabling

BLOOMSBURY APPLIED VISUAL ARTS   Recommendation: **Enable**

- 80% of liaisons (n=10) support enabling

BLOOMSBURY ENCYCLOPEDIA OF PHILOSOPHERS   Recommendation: **Disable**

- 100% of liaisons (n=10) support disabling
- 100% of liaisons with strong content-area overlap (n=1) support disabling

BLOOMSBURY FASHION CENTRAL   Recommendation: **Enable**

- 80% of liaisons (n=10) support enabling
- 100% of liaisons with strong content-area overlap (n=1) support enabling

Figure 2. Example faculty agenda item.

library faculty meeting (see Figure 2). Depending on the library faculty's approval of these recommendations, the Discovery Services librarian follows up by disabling any metadata collections and custom links that were voted to be disabled.

Depending on the rate at which metadata collections become available from EBSCO, this procedure is repeated about four times per year. Since late 2015, the faculty have completed 17 reviews of 156 unsubscribed and OA metadata sources, 65 of which were enabled and 92 of which were disabled as a result of the review process. Following completion of each review, all library personnel continue to monitor and report any access or fulfillment issues related to these sources through established troubleshooting channels. If one of these metadata collections proves

problematic, the Discovery Services librarian and the Interlibrary Loan librarian can reevaluate it for deselection. However, given the thoroughness of the initial review, this has not occurred.

Managing OA Content on the A–Z Database List

In addition to managing unsubscribed and OA content in the discovery layer, librarians at Georgia Southern proactively manage OA resources on the libraries' A–Z database list. Since 2015, the libraries have maintained their database list using Springshare LibGuides. Previously, as a member of the statewide GALILEO consortium, the libraries used the GALILEO Scholar website to maintain links to databases and platform-level electronic resources. However, the

LibGuides database list offers greater flexibility for selecting, organizing, and updating these resources. LibGuides allows librarians to assign subject headings to database assets, which then appear dynamically on subject-specific database lists. Also, librarians can dynamically map these assets to their individual guides, streamlining link maintenance. By selectively including OA resources alongside the libraries' subscription resources, librarians at Georgia Southern support access to a wider array of resources while encouraging awareness of OA and OERs.

Due to the proliferation of OA resources of varying quality and reliability, librarians at Georgia Southern make a point to carefully vet and approve OA resources for inclusion on the database list to ensure that they are of good quality and relevant to reference and instruction. Librarians also evaluate whether the resources are reliably hosted and compatible with Discover @ Georgia Southern and the link resolver. For a resource to be included, at least one liaison librarian must request the resource as well as commit either to assign at least one subject heading to the asset or to map the asset to at least one LibGuide. In turn, technical services staff audit all database assets annually for updates and corrections, and for continued inclusion on the database list. If an OA database asset does not have at least one subject heading or guide mapping at the time of the audit, then the staff report it to the Discovery Services librarian for further review. The Discovery Services librarian then coordinates with the liaison librarians either to add or restore the asset's assignments or to remove it from the list.

As of fall 2019, 62 of 296 databases appearing on the University Libraries' A–Z database list are OA. Of these databases, all have at least one subject heading assigned (100%), 38 (61%) are mapped to one or more individual guides, and 19 (31%) and are coded as a "Best Bet" (see Table 1).

Table 1. OA database asset by LibGuide mapping count.

Mapping Count	Number of Database Assets
0	24
1	6
2–5	18
6–9	6
10+	7
50+	1
TOTAL	62

Of the most frequently mapped OA databases, these resources tend to aggregate the broadest range of subjects and content. Less frequently mapped OA databases tend to have a narrower disciplinary focus, and so are candidates for inclusion on fewer guides (see Appendix A). As these figures indicate, OA databases make up over 20% of all resources included on the database list and appear throughout the libraries' individual LibGuides. Since implementing this method for reviewing OA resources on the libraries' database list in 2015, only two OA resources have been removed.

Despite the prevalence of OA resources on the libraries' database list and LibGuides, though, only six of 11 liaisons surveyed indicate that OA resources play a significant role in reference and instruction. According to these liaisons, they typically do not use OA sources in undergraduate or graduate instruction. Instead, they primarily discuss OA with faculty during research consultations or occasionally during reference interviews. One exception, however, is extensive use of federal, state, and local government websites, especially in social science and public health courses. While the libraries currently do not consider the particular use of OA resources when evaluating their continued inclusion on the libraries' A–Z database list, liaison feedback recommends investigating this in greater detail.

Conclusion

As these case studies show, effective curation of unsubscribed and OA content transcends traditional technical and public service roles. Working together, technical services, ILL, and liaison librarians are better able to evaluate the overall quality, likelihood of ILL fulfillment, and value of candidate metadata sources for inclusion in the discovery layer. Also, by maintaining threshold requirements for inclusion, conducting regular audits, and collaborating with liaison librarians to regularly review OA databases on the A–Z database list, technical services librarians are better able to ensure the quality and relevance of all resources on the database list. In turn, engaging technical services, ILL, and liaison librarians in active curation of unsubscribed and OA content increases all library personnel's awareness and buy-in for these resources, which contributes to patron awareness and engagement.

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Appendix A: Database Mapping Counts for OA Database Assets in LibGuides

Asset Name	Number of Guide Mappings
GIL-Find (Library Catalog)	55
Georgia Knowledge Repository	18
Georgia Southern University Electronic Theses & Dissertations	16
PubMed	13
ThomasNet	12
bepress Digital Commons	12
OpenDissertations	12
World Digital Library	10
Digital Commons@Georgia Southern	8
Library of Congress Digital Collections	8
Civil Rights Digital Library	7
Georgia Historic Newspapers	7
Occupational Outlook Handbook	6
ERIC	6
OSTI.gov	6
National Criminal Justice Reference Service	5
Bibliography of the History of Art	5
Digital Library of Georgia	5
American Fact Finder	5
Georgia Department of Archives & History	4
Baldy Editorial Cartoons: The Clifford H. Baldowski Collection	4
Census Data	4
Google Scholar	4
Merck Manual	3
USA.gov	3
Georgia Government Publications	3
Thesaurus Linguae Graecae	3
Bulloch County Newspapers	2
Math: Wolfram Functions	2
ArXiv.org	2
CEDB	2
Georgia Official and Statistical Register	2
Arts of the U.S.	2
New Georgia Encyclopedia	1
Congress.gov	1
Gale Literary Index	1
Georgia Census Data	1
PubMed Central	1
C-SPAN Video Library	1