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Open Discovery Initiative — What Libraries Can Do to Contribute

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PROMOTING TRANSPARENCY
IN DISCOVERY

Open Discovery Initiative (ODI)

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Marshall Breeding, one of the chief instigators of the initiative, can probably correct me when I go astray.

Background (ca. 2009)

- Emergence of Library Discovery Service solutions
- Agreements between content providers and discovery providers ad-hoc, not representative of all content, and opaque to customers.



- Since early 2009 there have been a number of major discovery products released
- Based on index of a wide range of content that included commercial and open access materials, Primary journal literature, ebooks, and more
- these are largely influenced by Google search model and user's expectations of a unified search
- To work effectively discovery services need to be as comprehensive as possible. Content items not included in discovery services present a challenge to library's in terms of how they will ensure that these materials are delivered to their users when needed.
- In conjunction with this there also needs to be a transparency in what is included in a discovery service and what is not included.
- The ODI WG launched after ALA 2011 to facilitate increased transparency in content converge of index based discovery services and to recommend consistent methods of content exchange or other mechanisms.
- ODI has created recommended a set of recommended practices for content providers and discovery service providers.

ODI's Goals

- Define ways for libraries to assess the level of content provider participation and for discovery services to affirm how they use that content
- Help streamline the process by which content providers work with discovery service vendors
- Define models for “fair” linking from discovery services to publishers’ content
- Determine what usage statistics should be collected for libraries and for content providers

From Library perspective: Web-scale discovery systems are increasingly important to the work of libraries in service of their users. As these discovery systems become more complex, librarians are less able to understand or explain to their users what content is included or how. The Open Discovery Initiative's recommended practice represents a significant opportunity to understand what is indexed, where it comes from, and how it is used. Increasing need to ensure that the coverage meets our needs.

Recommended Practice

- A technical recommendation for data exchange including data formats, method of delivery, usage reporting, frequency of updates and rights of use
- A way for libraries to assess content providers' participation in discovery services
- A model by which content providers work with discovery service vendors via fair and unbiased indexing and linking

From Library perspective: Web-scale discovery systems are increasingly important to the work of libraries in service of their users. As these discovery systems become more complex, librarians are less able to understand or explain to their users what content is included or how. The Open Discovery Initiative's recommended practice represents a significant opportunity to understand what is indexed, where it comes from, and how it is used. Increasing need to ensure that the coverage meets our needs.

ODI Standing Committee 2014-today

- To promote educational opportunities about adoption of recommended practices
- To provide support for content providers and discovery providers during adoption
- To provide a forum for ongoing discussion related to all aspects of discovery platforms for all stakeholders (content providers, discovery providers, libraries)
- To determine timing for next steps for ongoing work



5

ODI has worked on the following initiatives:

- to promote educational opportunities about adoption of recommended practices
- to provide support for content providers and discovery providers during adoption (including championship of self-check conformance lists)
- To provide a forum for ongoing discussion related to all aspects of discovery platforms for all stakeholders (content providers, discovery providers, libraries),

- ALSO
- To become clearinghouse for any new issues that arise, taking them through work item process if needed
 - Participated in NISO webinar November 2014
 - NISO Open Telecon 2016, 2017

SUBCOMMITTEES

- Starting in 2014 a number of subcommittees started to focus on various areas:
 - Conformance: Looking at what is needed from dsps in terms of A&Is allowing content to be used. Created template checklist for discovery providers to use with publishers and content providers
 - Education: Did NFAIS webinar in January 2015. Presented at SSP Pre-conference for early professionals in publishing; Laura will present in early 2015.
 - Technical: started activity grid and started looking at issues related to fair linking and counter statistics; met with dsps in January 2015 to work on library related issues.

Surveyed A&Is on what was most important to them concerning content in DSPs. Using the responses to this survey, ODI group members identified various potential barriers that discovery services present to A&I providers. A follow up survey of narrative questions has been developed that will be sent to representatives from DSP. This survey will inquire how DSPs are able to meet the most important concerns of A&I services.

ODI Standing Committee Roster

Libraries

Marshall Breeding, Independent
Consultant
Noah Brubaker, PALNI
Teresa Hazen, University of Arizona

Geoffrey Morse, Northwestern University
Laura Morse, Harvard University
Sarah Stang, Okanagan College
Ken Varnum, University of Michigan

Publishers

Bobbi Patham, Springer Nature
Maria Stanton, ATLA

Anne-Marie Viola, SAGE Publications
Julie Zhu, IEEE

Service Providers

Scott Bernier, EBSCO Information Services
Jay Holloway, OCLC

Rachel Kessler, Ex Libris/ProQuest

The committee is made up of representatives from Discovery Service Providers, Abstract & Indexing services (publishers), and Academic Libraries.

Value Proposition for Libraries

Libraries/Users. Finding relevant content is simpler when more resources are indexed on one platform. ODI makes it easier to understand which resources are included in discovery services and assess their impact.



While discovery systems make it easy to retrieve a large amount of content they do not contain 'everything'. A key for librarians is understanding what resources are included in the discovery system so they can better assist users in the best searching technique.

2018 Priorities

- Increasing Content Provider participation in discovery and conformance with the Open Discovery Initiative RP
- Analyzing and defining usage stats needed by stakeholders
- Recommending methods for content coverage disclosure for Content Providers and Discovery Providers

In the coming year we will be working with content providers and discovery providers to facilitate smoother interactions and, hopefully, greater participation in discovery service platforms. You can see in the bullet points the main areas of focus for the coming year.

2018 Priorities

- Updating the Recommended Practice to ensure it addresses needs and responsibilities for all stakeholders (Libraries, Content Providers, Discovery Providers) in line with current technologies and library trends
- Continuing to educate stakeholders via a variety of mechanisms

We will also be working on the continual process of updating the Recommended Practices and continuing to educate stakeholders.

How You Can Help

If understanding the discovery landscape is important to your library....

- Review the Recommended Practice
- Ask your content providers to share their conformance statements
- Understand where the content you license is, and isn't, being made available

We will also be working on the continual process of updating the Recommended Practices and continuing to educate stakeholders.

Resources for Librarians

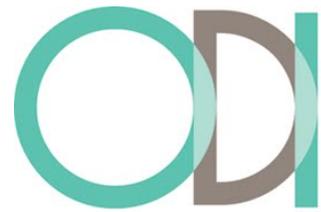
- FAQ and talking points
<http://www.niso.org/standards-committees/odi/library-talking-points>



General Resources

- Website
<https://www.niso.org/standards-committees/odi>
- Mailing list
<https://groups.niso.org/lists/opendiscovery/>
- ODI Updates
<https://www.niso.org/standards-committees/odi/updates>
- Twitter
https://twitter.com/NISO_ODI





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Thank you! Questions?

<https://www.niso.org/standards-committees/odi>