Improving Discovery
It's More Than a Single Product

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Library Technology Conference, Macalester College
March 15, 2012
Agenda

1. Getting Started with Discovery
2. Definition of Terms
3. Stakeholders
4. SWOT Analysis
   • Exercise
5. Requirements
   • Exercise
6. Wrap Up
### ADVANCED KEYWORD (1-12 of 335)

<table>
<thead>
<tr>
<th>Page</th>
<th>Title</th>
<th>Collection</th>
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<tbody>
<tr>
<td>1</td>
<td>Page one [videorecording] : inside the New York times / Magnolia Pictures and Participant Media in a StO Rolvaag Library</td>
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<tr>
<td></td>
<td>Commentators Sarah Ellison, Andrew Ross Sorkin, David Carr, Larry Ingrassin, Bruce Headlam, Dennis Crowley, Richard Pérez-Peña, Evan Wiliamson, Marcos Moulitsas, Alex S. Jones, Seth Mookin, Ian Fisher, Nicholas Lemann, Noam Cohen, Clairborne Ray, Susan Chira, Carla Baronack, Nick Denton, Jeff Jarvis, Jimmy Wales, Katrina Vanden Heuvel, Rick Lyman, Shane Smith, Dean Baquet, Tim Arango, Brian Lam, Gay Talese, James McQuivey, Carl Bernstein, Michael Hirschorn, John Carr. Editors, Chad Beck, Christopher Branca, Sarah Devorkin; cinematographer, Andrew Rossi; original music, Paul Brill.</td>
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<tr>
<td>3</td>
<td>The best American travel writing 2010 / edited and with an introduction by Bill Buford; Jason Wilson</td>
<td>CC General Collections</td>
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Find...
Books, periodicals, videos, images, and other media

Reserves e-Reserves and physical materials reserved for a specific course

Research Help & Feedback Get help using the library or give us feedback

Your Accounts InterLibrary Loan (ILLiad) and your Bridge account

For Faculty & Departments Library services for faculty and departments

About the Library Hours, maps, collections, policies, staff directory, and more

Library News, Events, and Exhibits

The Carleton College Archives

Gould Library News
April 18, 2011
Tax Information (Federal and State)

More Gould Library News

Events Calendar
Thu. Apr. 7 (Today)
11:45 am - Group vs Individual Problem Solving Strategies

Tue. Apr. 12
4:00 pm - David Garneau Lecture

Fri. Apr. 15
12:00 pm - Teagle Conference - “State Your Case”
4:00 pm - Foro Latinoamericano

Sat. Apr. 16
9:30 am - Foro Latinoamericano
10:30 am - Foro Latinoamericano

Tue. Apr. 19
4:30 pm - Karsten Troyka

More events
Find materials at the library and beyond

Search for books & more on the Bridge:

Search

Databases & other online resources
Search for articles, images, statistics, and more.
- Articles
- Images, Music, and Video
- Data and Statistics
- Literary and Historical Texts
- Online Reference
- Newspapers
- Full list by title / by subject

Journals, Magazines, and Newspapers
Search for a journal, magazine, or newspaper to see which years we subscribe to, and how to access them.
- Look up a citation (by title, journal, issue, etc)
- Interlibrary Loan request articles from journals we don't subscribe to

Books & more
Find books and other items at Carleton and other libraries
- Bridge search Carleton & St. Olaf's collections
- Advanced Bridge search
- CJK Bridge search (Chinese/Japanese/Korean)
- New Books in Bridge
- Reserves
- WorldCat find materials at other libraries
- Interlibrary Loan request books from other libraries

Movies & TV
Finding, accessing, and using media resources in the library and online.

Research Help

Using Library Resources from Off-Campus
A guide to using library resources from off campus. Includes instructions on accessing journals through our proxy server.

Course Research Guides
Research guides designed by librarians specifically for your course.

Subject Research Guides
Find out how to start researching in a particular subject.

General Research Guides
Learn more about topics such as citing sources, finding government information, and how we arrange the books on our shelves.

EndNote
EndNote can help you organize references that you find during your research. Download EndNote and find out how to use it in your research.

Ask a Librarian
Ask a reference librarian about Carleton Library resources or for help with a research question.

Ask the Archives
Ask the staff of the Carleton College Archives about Carleton history.

Digital Archiving of Comps & Honors Papers
Instructions for archiving comps & honors papers
Getting Started with Discovery

1. Determine and clarify your goals.

2. Draft a statement of need ("charter").
   - May depart from your initial charge.

3. Broadly communicate your statement of need.
   - Get everyone on the same page, as soon as possible, all along the way.
Initial Charge to Discovery Tool Task Force

"Discovery tools, catalog overlays and federated search tools are increasingly used as an alternative or supplement to local library catalogs."

“Funds have been set aside this fiscal year to purchase a system (if identified) with the expectation that the system would be implemented during 2011-2012."

- Develop statement of need
- Environmental scan
- Assess users
- Review products
- Review existing work

November 2010
Statement of Need

• Sophisticated searching options such as faceted searching, spelling suggestions, results ranking, highlighted hits for search terms and previews of descriptive information
• Discovery based on full content searching, not just metadata
• Single search discovery of resources of all kinds from both local and other repositories, including journal articles, multimedia, archival materials, etc.
• State-of-the-art web interface design including a single search box for keyword searching, an option for advanced search for researchers’ in-depth subject searching and intuitive self-explanatory navigation and browsing
• Access to information and resources using fewer steps, including full text.
• Enriched content: cover images, quality reviews, table of contents (TOC), summary descriptions etc.
• "Push" technologies, such RSS feeds, system-generated "recommendations" based on past searching or other criteria
• Access via mobile devices
• User contributions such as the ability for users to rate, tag, review materials
Discovery Tool Task
Force Recommendation

3-Part Recommendation

1. Implement VuFind as a catalog overlay by Sep 2011
2. Design a uniform search portal to be used on both Carleton and St. Olaf’s library home pages
3. Continue investigating web scale discovery tools and their likely successors

April 2011
April 2011 - Current

• VuFind implementation
  o Rolled out Fall 2011

• Web Portal implementation
  o Rolled out Fall 2011

• Discovery Task Force 2
  o Began meeting Fall 2011
  o Recommendation due: April 2012
Definition of Terms

Norm definitions early to guide:
  process - stakeholders - ultimately, recommendation

For instance:
  Web scale discovery vs. catalog overlay
  Pre-harvested (aggregated) index vs. federated search
Stakeholders

• Faculty
• Circulation Staff
• Cataloging Staff
• Systems Staff
• Reference & Instruction Staff
• Students
• ITS
• Bridge Advisory Group
• Administration
## Stakeholders

<table>
<thead>
<tr>
<th>COMMUNICATION</th>
<th>USERS</th>
<th>LIBRARY STAFF</th>
<th>ITS</th>
<th>ADMINISTRATION</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Focus Groups</td>
<td>Staff Survey</td>
<td>Systems Requirements</td>
<td>Progress Reports</td>
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<tr>
<td></td>
<td>User Studies</td>
<td>Staff Meetings</td>
<td></td>
<td>Recommendation</td>
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<td></td>
<td>Feedback Forms</td>
<td>Regular Email Updates</td>
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| APPROVAL            |                              |                                   |                              | Funding                      |
|                     |                              |                                   |                              | Systems Support              |
# SWOT Example

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
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<tr>
<td>• Explicit charge from both colleges in consortia (e.g. buy-in, staff time)</td>
<td>• Charge was:</td>
</tr>
<tr>
<td>• Existing consortial relationship</td>
<td>• Broad</td>
</tr>
<tr>
<td>• Knowledge gained from (1) previous task forces exploring overlays and (2) Metalib implementation project</td>
<td>• Focused on a product-based solution</td>
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<tr>
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<td>• No new hires</td>
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<tr>
<td></td>
<td>• Need to work within existing staff time and expertise</td>
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<td></td>
<td>• Legacy library systems</td>
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</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
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<tbody>
<tr>
<td>• Partner within consortia</td>
<td>• Memories and associations with discovery</td>
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<tr>
<td>• Outsource for expertise we don’t have</td>
<td>• Discovery vendor marketplace:</td>
</tr>
<tr>
<td>• Internal web programming capabilities</td>
<td>• Highly competitive</td>
</tr>
<tr>
<td>• Learn from other libraries who come before us</td>
<td>• New and emerging</td>
</tr>
<tr>
<td></td>
<td>• Volatile</td>
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SWOT Exercise

What are the **Strengths**, **Weaknesses**, **Opportunities**, **Threats** for your library or your consortium related to discovery?

- Take a few minutes and fill one or two parts of the SWOT (or more) in your handout.
- Then, discuss for a few minutes with your group.
- Then, we'll discuss as a bigger group.
Requirements List

Helps identify or frame:

• Important parts of project
• Negotiable items
• Non-negotiable items
• Needs
• Wants
• Stakeholders input and perspective
Requirements List - Exercise

1. Form small groups
2. Designate a recorder
3. Brainstorm items for requirements list
4. Report items back to larger group
5. Weight items by popular vote
Requirements List - Sample Items

- Display results from many kinds of databases
- Real time status/availability of print materials
- Faceted searching
- User comments, ratings, reviews or records
Requirements List - Categorizing

Intelligent Searching:
Facets, spelling suggestions, results ranking, highlighted search terms, previews.

Silo Reduction:
Features that reduce the barriers between resources, either by having resources that are more open and share information, or resources that can be accessed through one tool.

Layout and Customization
BRIDGE
CARLETON & ST. OLAF LIBRARIES

Search Options
Search History
Advanced Search

Find More
Browse the Catalog
Check your Library Record
Bridge Classic

Need Help?
Search Tips
Ask a Carleton Librarian
Ask a St. Olaf Librarian
FAQs
Material type icons by the
Bridge Material Type Icons
Project
For More Information

Thank you!

Brian Conlan, St. Olaf College
Danya Leebaw, Carleton College
Christina Sinkler-Miller, Carleton College
Nat Wilson, Carleton College

For copies of these slides, the handout and more information: http://digitalcommons.macalester.edu/libtech_conf/2012/sessions/87/