Chapter 5
Best Practices for Selecting the Best Fit

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ABSTRACT

The authors of this chapter interviewed librarians from fifteen academic institutions who participated in a selection process for a discovery service. The pool of academic institutions engaged in the interviews represented universities and colleges of varying sizes in order to capture a variety of approaches to selection. Institutions were further chosen based on their use of a defined selection process that resulted in a recommendation and implementation of a discovery service. These interviews informed the identification of best practices and challenges faced in the selection process. The methodology and a summary of the interviews are described. The challenge of pursuing best practices is also discussed.

INTRODUCTION

The proliferation of resources that support research, teaching, and creative work understandably confuses and overwhelms the academic library user community. These resources can include licensed and open-access content, digitized materials, bibliographic tools, link resolvers and institutional repositories. Even an "expert" researcher encounters difficulty navigating a growing number of resources, interfaces, and search options that can be offered by the academic library. Google has created an expectation of a simple search process that libraries are now attempting to replicate. While next generation catalogs and federated search engines served as the first step in improving the user experience, the locus of attention for academic libraries now rests on

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commercially developed or open source discovery services. Discovery services strive to integrate as much content as possible through a single search to arrive at the Google-like experience. As these tools multiply and develop, the selection process is increasingly complex and time-consuming, yet remains critical. In the selection process, what are the best practices that play a role in a successful implementation of a discovery service?

BACKGROUND

The literature on discovery services is emerging. As recently as 2007, researchers spoke of next-generation catalogs, which added new facets and search capabilities to the existing materials in the catalog. Prior to next-generation catalogs, federated search engines aimed to facilitate student research. Librarians from Paul Smith's College in New York described their experience selecting a faceted open-source backup to their catalog called Fac-Back-OPAC (Beccaria & Scott, 2007). *Serials Review* published a column that brought together five different libraries that evaluated different federated search products in an attempt to provide a single search box for their patrons (Boyd et al., 2006). Each discussed reasons for implementing these products, what criteria they used, what problem(s) they were trying to solve, and benefits and limitations. Marcin and Morris addressed the inclusion of federated search capability in the catalog as a desired characteristic in their article discussing the evaluation and selection process for a next-generation catalog (2008). At the 2010 NASIG Annual Conference, Collins moderated a session on open source library systems and next generation catalogs. In summarizing the session, Collins noted that "[m]any of the same themes were repeated, specifically...enhanced discovery tools that facilitate searching and integrate the catalog with other data streams including federated search results, article databases, and institutional repository contents" (Collins, 2011, p.172). Dempsey discussed discovery versus location of information, how commercial resources offering a unified discovery experience changed user expectations in searching for library resources, and the need for discovery tools to create a better user experience (2006). Breeding, in his introduction to the 2007 *Library Technology Reports* examining next generation catalogs, described the desired features of a next-generation catalog and called for a move to combine the searching for books and articles into a single search, rather than just adding new search capabilities to the existing catalog. In his article, "In Search of a Really Next-Generation Catalog," Singer declared, "it is time to shed the trappings of the card catalog and reconfigure our assets to work with the Web instead of around it" (Singer, 2008, p.142).

As noted by Dempsey and Breeding, discovery services added a new dimension to next generation catalogs by pulling journal articles and other materials into a single search, rather than having patrons muddle through fragmented resources to perform a complete search of the literature. In 2005, the University of California Bibliographic Services Task Force observed that:

Users who are accustomed to Google expect to enter one search and retrieve information pulled together from across the information space and presented in a single ranked list. They want more than the ability to search multiple catalogs or multiple A&I databases simultaneously. They expect to search the full range of tools cited above or subsets the user wishes to select. (2005, p.19)

Their report described a number of desired features in such a system, including direct access to content, recommender features, customization, search strategies in the event of a failed search, and FRBRized search results. The Task Force also outlined principles to guide the redesign of their services to rethink their system architecture and focus more on services and less on the systems themselves. In his 2010 article, Breeding succinct-