

## Chapter 23

# Implementing a Discovery Layer in a Consortial Environment

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### ABSTRACT

*A consortium of five liberal arts colleges (Denison, Kenyon, Oberlin, Wooster, and Ohio Wesleyan), decided to investigate discovery tools, established a process for reviewing and selecting a product, and worked through the delicate implementation decisions of a shared resource. Consortial cooperative efforts between libraries have very deep roots in Ohio, where OhioLINK has established an enviable record of success. This effort of The Five Colleges of Ohio marks one of the first forays into consortial discovery layer implementation. Selection criteria for use in a consortial environment and best practices for implementation are included in the chapter. Throughout the selection and implementation process, local preferences and considerations were continually balanced against the needs of the consortium*

### INTRODUCTION

One of the big challenges presented by significant innovations, especially processes, products, and approaches that require a paradigm shift, is the timing. It is easy to recognize the bleeding edge of an innovation, when investments of time and money are so prohibitively high that the great majority of libraries cannot consider early adop-

tion, even should they be willing to work through the inevitable bumps of beta. It is much harder to identify that perfect moment in time when yesterday's cutting edge becomes today's best practice. Timing has always been difficult, even when most libraries operated relatively independently and each could make decisions based largely upon local circumstances and resources. In today's "flat world," most libraries have become involved in, perhaps even entangled by, partnerships, coalitions, and consortia. Those multiple relationships,

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for all their wonders, bring with them an infinitely more complex decision-making process even as the pace of change continues to accelerate.

For academic libraries, one of the innovations du jour is, of course, the discovery layer or service. Although this new service is appealing to many libraries, it is relatively expensive in terms of both purchase/subscription costs and staff time for implementation. Consortial purchase and implementation of a discovery layer, which can offer significant financial savings and leverage the shared expertise of multiple institutions, may be a very practical approach for many libraries to consider. Careful planning, pre-defined evaluation criteria, and equal participation and contributions by all members throughout the selection and implementation processes will help minimize the potential risks of multi-institutional collaborations.

## **BACKGROUND**

Cooperative efforts among libraries in the United States have a long and vibrant history. Melvil Dewey himself authored, "Library Co-operation" in an 1886 issue of *Library Journal* and the American Library Association included a Co-operation Committee as early as the 1880's (Kopp, 1998). Indeed, library consortia, "which involve groups of libraries cooperating for mutual benefit, are a natural outgrowth of a spirit of sharing that lies at the foundation of all libraries" (Alberico, 2002, p. 63). In her article, "The History and Development of Academic Library Consortia in the United States: An Overview," Sharon L. Bostick identifies resource sharing, lending privileges, book purchasing and cataloging, automation of library systems, staff development, and cost savings through group purchasing power as goals of early library cooperative efforts (Bostick, 2001).

Studies looking at more contemporary roles of consortia naturally begin to focus on the impact of new technologies and highlight the importance

of a unified search platform. In 2002, Jackson and Preece discuss broad interest in creating portals to unify the myriad online resources available and suggest that consortia might, "serve as a sounding board for new initiatives and may represent a safe haven for experimentation . . . [and] allow libraries to experiment collectively with innovative ways to provide information" (Jackson & Preece, 2002, p.160). The successes of consortia in the 1990's to purchase content helped create a recognized need for better discovery tools: "More recently, as the corpus of on-line information offered by consortia has grown, now including millions of journal articles available from some consortia, concerns about enabling resource discovery and promoting information literacy have come to the forefront" (Alberico, 2002, p. 64). Nfila and Darko-Ampem, in their overview about consortia from the 1960s through 2000, end their article with a similar conclusion: "Academic libraries are fast shifting from sharing bibliographic information to sharing technology for bibliographic control. This trend is bound to continue" (Nfila & Darko-Ampem, 2002, p.211).

At this time, however, very little on consortial implementations of discovery tools has made its way into the professional literature. Digby and Elfstrand's article on MnPALS Plus (Digby, 2011), a VuFind-based discovery tool developed for PALS, a consortium of Minnesota colleges and universities, is one of the few examples. However, many of the challenges and obstacles identified and best practices suggested about other consortial efforts with shared systems remain very pertinent to discovery layer implementations. Recent literature on institutional repository software includes two very useful articles on consortial instances, one at the Washington Research Library Consortium (Hulse, 2007) and the other for SHERPA-LEAP, a consortium of seven academic institutions in the UK (Moyle, 2007). Many articles are also available that discuss consortial library automation and shared ILS systems, but one of the most helpful for considering consortial efforts is Vaughan and

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