

Chapter 24

Creating Organizational Buy-in: Overcoming Challenges to a Library- Wide Discovery Tool Implementation

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ABSTRACT

While launching a discovery tool can be technically easy, establishing a process that will result in organizational buy-in for the tool is an exceptionally important first step for a successful implementation. Many lessons about creating organizational buy-in can be learned from experiences with federated search software and next-generation catalogs. Libraries must grapple with three critical areas before discovery tool implementation. First, the library will need to consider how the discovery tool will affect key library departments and create a plan for addressing their concerns. Second, training will need to be developed for staff as well as end users. Finally, monitoring and assessing the discovery tool's performance and impact will inform future decision-making related to the tool's integration with the library's other systems and services. Each of these areas will be explored in the context of existing library research, with illustrations from James Madison University's discovery tool implementation.

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INTRODUCTION

Discovery tool implementations should be carefully planned and executed in order to improve organizational buy-in and enhance the resulting user experience. Many of the issues and concerns libraries face related to discovery tools have broad implications and need to be approached with perspectives from multiple stakeholders. This chapter will explore several critical areas using research from the literature and examples from James Madison University (JMU). JMU is a predominantly undergraduate institution of approximately 19,000 students in the commonwealth of Virginia. Some of JMU's programs of strength include communication sciences and disorders, music, psychology, nursing, business, and education. The libraries have a strong instructional program, and have been successful at partnering with other departments on campus to implement a required information literacy test for all students entering their sophomore year. Over twenty liaison librarians provide subject-specific library instruction. Additionally, a general education librarian has recently begun working with the campus general education committee to increase the libraries' connections to lower-division students. Because of this strong commitment to student instruction, implementing a discovery tool at JMU necessitated involving numerous internal stakeholders in the process.

Discovery tools bring profound changes to the nature of searching that affect staff and patrons in different ways. While many library systems, such as the catalog and traditional article indexes, were initially designed for librarians and scholars, discovery tools were designed for library patrons. Discovery tools eliminate the need for users to choose among library tools before beginning a search. With a discovery tool, a patron has to learn only one interface; the user can gather books, articles, and other types of items into one folder; and can limit effectively to full-text online without reducing result sets. However, library

staff will need to illustrate to patrons that there are additional choices beyond the discovery tool that could be valuable for specialized searching.

While discovery makes search more manageable for patrons, it can be disruptive for librarians. Librarians do not need the library catalog to be combined with article indexes; in fact, it is more comfortable for most library staff to search such tools separately. When searching separate tools, characteristics such as authority and consistency are crucial. Discovery tools, on the other hand, compromise in these areas in order to be current, relevant, and provide as much content as possible. Whereas patrons need to think like librarians in order to use the catalog and article indexes, librarians may need to start to think more like patrons in order to understand discovery tools.

This chapter will begin with lessons gleaned from the literature relating to the advent of federated search, next-generation catalogs, and discovery tools. It will then examine three key areas for organizational buy-in related to the implementation of discovery tools: how the discovery tool will affect key library departments, developing training materials for staff and end users, and monitoring and assessing the discovery tool's performance and impact.

BACKGROUND

The vision for discovery software as a unified search of library collections has its origins in federated search, which combined library catalogs, databases, and journals in one search interface, providing a similar search to Google and other search engines (Cervone, 2005; Miller, 2004). This desire was based on knowledge of users' expectations to simply search, not to choose among various databases (Alling & Naismith, 2007, p. 195; Cervone, 2005, p. 10; Randall, 2006, pp. 181-182; Tallent, 2004, p. 69-75). However, the performance of federated search software disappointed many libraries, with problems related

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