



## National Information Standards Organization Open Discovery Initiative Update Summer 2022

Dear Colleagues,

In the past year, the ODI Standing Committee has focused on general ODI education and conformance statement advocacy. If you missed our presentations and workshops, you can view the slides or watch recordings via the links below.

Although we have seen a small increase in the number of **libraries** and **content providers** who have released conformance statements, we still hope for more participation by the wider library community.

Marshall Breeding generously included questions related to ODI awareness in his International Survey of Library Automation. Conducted every year since 2007, this survey provides an opportunity for libraries to rate and comment on their core library management systems. Starting in 2020, the survey included an additional section for academic libraries to assess the effectiveness of their discovery services, with two questions specifically targeting library awareness and interest in the Open Discovery Initiative:

- Did the library include consideration of the NISO Open Discovery Initiative in selecting or renewing this discovery product?
- How would you rate the importance of the NISO Open Discovery Initiative?

The report based on the latest survey, “**Library Perceptions 2022: Results of the 15th International Survey of Library Automation**” included discussion of this portion of the survey as well as a summary of the responses to the ODI-related questions:

The survey also explored interest and use of the Open Discovery Initiative. When asked about the importance of ODI, libraries using Primo (5.81) and Summon (5.53) expressed the highest interest, followed by EBSCO Discovery Service (5.33). Libraries using OCLC WorldCat Discovery Service showed the lowest interest in ODI (4.71).

Only a small portion of libraries used the ODI as they considered the selection of their discovery service. Libraries using Primo indicated the highest level of use (13.4%), followed by Summon (10.1%) and WorldCat Discovery Service (8.5%); of those using EBSCO Discovery Service, 8% considered the ODI.

Two tables summarized the results of these questions.



# National Information Standards Organization

## Open Discovery Initiative Update

### Summer 2022

## Importance of Open Discovery Initiative

*Statistics related to the question: Importance of Open Discovery Initiative (2021)*

Importance of Open Discovery Initiative		Response Distribution										Statistics			
Discovery Service	Responses	0	1	2	3	4	5	6	7	8	9	Mode	Mean	Median	Std Dev
Primo	268	18	5	9	9	20	46	28	62	43	28	7	5.81	6	0.49
Summon	59	7		2		3	13	8	13	11	2	5	5.53	6	0.65
EBSCO Discovery Service	193	24	3	1	11	8	49	28	26	23	20	5	5.33	6	0
WorldCat Discovery Service	89	10	3	2	2	16	28	7	12	5	4	5	4.71	5	0.74
All Responses	675	66	11	17	29	56	147	80	120	90	59	5	5.43	6	0.19

## Open Discovery Initiative

Used Open Discovery Initiative for Discovery Selection			
Discovery Service	Total Responses	Used ODI	Percent
EBSCO Discovery Service	286	23	0.0804
Primo	352	47	0.1335
Summon	79	8	0.1013
WorldCat Discovery Service	128	11	8.59%
All Responses	1065	97	9.11%

## Observations

The results of the survey reflect a relatively low level of awareness of the Open Discovery Initiative. On average, 9.1% of libraries took the ODI into consideration when selecting their current discovery service. A somewhat higher portion of libraries using Primo indicated interest (13.4%) than those using EDS or WorldCat Discovery.

In this era academic libraries tend to acquire discovery services as part of their core library management environment, such as WorldCat Discovery Service bundled with WorldShare Management Services and Primo or Summon bundled with Ex Libris Alma. Likewise, libraries implementing FOLIO tend to use EBSCO Discovery Service. In the context of procurement scenarios that include multiple core components, discovery services are less likely to be



## National Information Standards Organization Open Discovery Initiative Update Summer 2022

evaluated and selected separately. The section of the survey comparing the major index-based discovery services did not reveal significant differences in how libraries perceive the effectiveness of the four major products. Not only do libraries not consider ODI compliance when selecting discovery services, but discovery considerations are folded into an evaluation process that includes multiple major technology components.

Whether discovery services are evaluated discretely or as part of a broad procurement process, it is essential that these products address content objectively regardless of its publisher or provider. The Open Discovery Initiative has worked for over a decade to promote a more open approach to metadata exchange among content providers and developers of discovery services. It remains important for libraries to assess objectivity as they evaluate discovery services. We urge libraries to take time to become more familiar with the ODI Recommended Practice and include requirements that discovery services under consideration conform to its recommendations.

Based on these survey results, the Standing Committee is renewing efforts for education and conformance statement advocacy in the coming year.

### ODI in Action

**Charleston Conference 2021.** Laura Morse presented an overview of the new guidelines for libraries to evaluate how proactive they are in providing the best discovery environment for their users in a November 4, 2021 session titled “**New Travelers on the NISO Open Discovery Initiative (ODI) Wagon**” at the Charleston Conference. This session also provided practical guidance on how libraries can release their own ODI Library Conformance statement.

**NISO+ 2022.** On February 16, NISO ODI members Geoff Morse, Bob Boissy, and Julie Zhu, and David Green of the Ohio State Library gave a presentation at the 2022 NISO+ conference titled “**The Discovery Audit Revisited.**” Geoff and David discussed the benefits of a discovery audit and completion of an ODI conformance statement from the library perspective, while Bob and Julie discussed ways in which content providers could work to better communicate with libraries to ensure more accurate discovery configuration.

**ER&L 2022 Conference.** On March 15, Julie Zhu, Nettie Lagace, and Rachel Kessler presented at the ER&L conference. The presentation, “**Open Discovery Initiative (ODI) Library Best Practices: What, Why and How?**” explained the need for a set of library best practices and reviewed how best to implement them.

**NASIG 2022.** On June 7, Bob Boissy and Maria Stanton presented at the NASIG Conference. The presentation, “**Influence of Libraries in the Discovery Services Process**”, explored the role of the libraries to ensure that discovery services meet their users’ needs. Maria and Bob promoted the ODI standing committee’s library conformance checklist, which outlines standardized actions for libraries to perform that benefit their user community. The benefits to all parties of



## National Information Standards Organization Open Discovery Initiative Update Summer 2022

completing the checklist were discussed, and librarians were encouraged to share feedback and descriptions of their needs with members of the NISO ODI committee.

**OhioLINK Electronic Resources Community of Interest (ERCI).** On May 4, Geoff Morse provided a [webinar](#) for librarians on completing ODI conformance statements to about 30 Electronic Resources librarians affiliated with OhioLINK. In this session Geoff went over why ODI was created, how it can benefit librarians, content providers, and discovery service providers, and discussed completing the conformance checklist. About 40 librarians attended.

**PALCI.** On May 12, Demian Katz and Ken Varnum presented “[NISO's Open Discovery Initiative: What Libraries Need to Know](#)” as part of the PALCI consortium’s “Lunch & Learn” series. This presentation provided a brief overview and history of the ODI followed by a pragmatic discussion of ODI’s Recommended Practice for Libraries, emphasizing the benefits of conformance.

**Scholarly Kitchen.** On July 14, Lettie Conrad republished a post by Julie Zhu in the Scholarly Kitchen on “[Building Pipes and Fixing Leaks: Demystifying and Decoding Scholarly Information Discovery & Interchange](#).” The article emphasizes the importance of standardizing metadata exchange and workflows and promotes the ideas and contributions of ODI.

### Current Initiatives

**Library Conformance Workshop.** On July 12, 2021 and January 19, 2022, ODI Standing Committee members Teresa Hazen, Laura Morse, Geoff Morse, and Ken Varnum led workshops to guide libraries in how to approach submission of a library conformance statement. The workshop used a worksheet that grouped the checklist into themes, and guided attendees through ways to approach gathering information to inform responses. A recording of the January 19 workshop can be found [here](#).

**Content Provider Conformance Workshop.** On November 29 and May 23, Rachel Kessler led a workshop for Content Providers to aid in the process of submitting a conformance statement. The workshop broke the requirements into manageable thematic sections and allowed Content Providers to share challenges and questions they had regarding conformance statements. A recording of the May event can be found [here](#).

**Spanish translations of conformance statements now available.** In an effort to make ODI conformance more accessible, we have translated the conformance statements for all stakeholders into Spanish. You can find them at the following links ([Content Providers](#), [Discovery Service Providers](#) & [Libraries](#)).

### Learn more about ODI

**Introductory Video.** There is now a [brief introductory video](#) on ODI and its importance to the various stakeholders in the research and information services community. In this 4.5-minute



## National Information Standards Organization Open Discovery Initiative Update Summer 2022

video, one can learn the history of ODI and the reasons for its inception, the goals of ODI, and see examples of the ODI conformance checklists for each group of stakeholders.

Please attend this upcoming presentation by the ODI Standing Committee to learn more about our work:

**IGELU 2022.** On September 13-15, Maribel Alvarado, Julie Zhu, and Ken Varnum will present “**NISO Open Discovery Initiative (ODI): Best Practices to Improve the Discovery Experience.**” This will include an overview of ODI, its goals and benefits for each stakeholder, a description of the Library Conformance Checklist and how it helps to improve the management of a discovery tool.

Please follow ODI on [Twitter](#) and keep an eye on the ODI [Website](#)!

Thank you - The Open Discovery Initiative Standing Committee