Dear Colleagues,

Thank you for your continued interest in and support of the NISO Open Discovery Initiative (ODI). Much activity is happening as we work to increase participation in discovery. Please see highlights below!

**ODI in Action**

**Conformance Checklists.** As discovery systems become the de facto front door to library content, it’s critical that librarians and patrons have the knowledge they need to use them effectively. The mission of the Open Discovery Initiative is to drive understanding and predictability into the discovery process by encouraging discovery and content providers to provide transparency into their processes. To this end, content providers and discovery service providers are encouraged to assert their conformance with NISO RP-19-2014, *Open Discovery Initiative: Promoting Transparency in Discovery*, the recommended practices of NISO’s Open Discovery Initiative, by publishing ODI Conformance Checklists. These Conformance Checklists are available on the [NISO ODI site](http://www.niso.org/odi). Checklists are available from Credo, EBSCO, Ex Libris, Gale, IEEE, ProQuest and SAGE. We encourage you to review these vendors’ ODI conformance and to encourage other providers to publish their Checklists.

**Spread the Love.** The ODI brochure -- which provides a high-level view of the Open Discovery Initiative -- is now available on the [NISO ODI site](http://www.niso.org/odi). The brochure details the key issues and metrics that ODI addresses and can be used within your organization and/or distributed to other stakeholders to easily share information about ODI initiatives.

**Charleston ODI Panel.** At the November Charleston conference NISO held an ODI Q&A session for librarians to help ensure that they can make informed decisions about the search technologies they provide to patrons. Panelists included Karen McKeown from Gale, Martha Sedgwick from SAGE, and Julie Zhu from IEEE; the session was moderated by Laura Morse. The session was well attended by librarians, content providers, and discovery providers. Panelists spoke to the importance of ODI conformance for their organizations, continued work to increase level of conformance with the Recommended Practice, and the importance of library feedback in shaping content provider priorities.

**When is Content not Discoverable?** An important issue which is beginning to gain visibility is the extent to which licensed content--which should be accessible via discovery--is not. There are a variety of reasons why this “content gap” may occur. In *Collaborating to Reduce Content Gaps in Discovery: What Publishers, Discovery Service Providers, and Libraries Can Do to Close the Gaps*, Julie Zhu & Jalyn Kelley explore and analyze reasons for the non-availability of IEEE Content in the four major discovery systems.

**Discovery Standards.** In a paper that mirrors many of the philosophical underpinnings of ODI, *What’s Driving Discovery System? The Case for Standards* by Heather Lea Mouaison (University of Missouri), Angela Kroeger (University of Nebraska at Omaha), and Edward M. Corrado (University of Alabama, Tuscaloosa) discusses issues in library discovery. These include the “black box” proprietary nature of discovery systems as well as the lack of prominence of information from A&I providers about what is provided.

**NISO Update at ALA Midwinter.** Ken Varnum provided an update on ODI activities at the January ALA meeting. Topics reviewed included: development and release of Conformance Checklists for content providers and discovery service providers; progress made by the Education & Publicity workgroup to help all ODI participants understand the Checklists; development of documentation, training, and assistance for content providers, discovery service providers, and libraries as they submit and read the Checklists; and updates to the ODI Standing Committee website.
Current Initiatives

**A&I Outreach.** A publisher-focused initiative within ODI began in 2015 to increase awareness and communication with secondary publishers such as A&I database providers. Small-group meetings were held throughout the summer and fall in order to help educate ODI members on the successes and challenges experienced by a wider range of content providers. This effort will carry on through the new year.

**Librarian Materials.** A working group within ODI is developing a talking points template for librarians to use when raising issues of ODI conformance with content providers and discovery providers. The document, when released, will contain text describing the benefits of ODI conformance from a library perspective and highlight steps content and discovery service providers should take so they can declare themselves to be in conformance with the Recommended Practice. Look for these materials in late January 2016.

**Discovery Service Provider Outreach Initiative.** The initiative was formed with the purpose of exploring the various technological challenges experienced by discovery providers and addressing possible solutions. The group is currently looking into solving issues relating to “coverage gaps” and drafting recommendations for a tool to make the discovery “black box” more transparent to both libraries and content providers. The initiative has also resumed discussions with COUNTER regarding creating standards for content provider usage reports.

**NISO Forum Participation.** Several members of the ODI Standing Committee attended the October 2015 forum The Future of Library Resource Discovery. Marshall Breeding presented a summary of his findings in the keynote session. Scott Bernier (EBSCO), Julie Zhu (IEEE), Jason S. Price (SCELC Library Consortium), and Nancy McKeown (Gale | Cengage Learning) presented during the meeting (slides available on the NISO website). The Forum also provided ample opportunity for group discussion; the ODI Standing Committee members are excited to work with NISO on emerging areas of interest in future!

**Spotlight on the Recommended Practice: Content Provider Metadata**

ODI recommends that all content providers provide “the core metadata, and underlying full-text/original content, for complete offerings, for the purposes of indexing to meet licensed customers’ and authenticated end users’ needs.” In order to support transparency in library discovery indexing practices, content providers are encouraged to share the metadata elements they provide to discovery services for indexing. (ODI considers a “content provider” to be any organization disseminating literature or information, including primary publishers, aggregators, repositories, A&I databases, etc.)

This is the core set of metadata recommended of Content Providers and itemized in Section 3.2, Table 1 (pg. 16) of the ODI Recommended Practice:

- Title (item)
- Authors
- Publisher name
- Volume
- Issue
- Page(s)
- Date / Date range
- Item identifier (e.g., DOI)
- Component of title (publication)
- Component title identifier
- URL
- OA designation
Learn more about ODI

Please attend these upcoming presentations by the ODI Standing Committee to learn more about the Open Discovery Initiative:


Ken Varnum. ALA Annual 2016. NISO Open Discovery Initiative Update, sponsored by ALCTS. Date/time TBD.

Please follow ODI on twitter!

Thank you - The Open Discovery Initiative Standing Committee