Dear Colleagues,

Thank you for your continued interest in and support of the NISO Open Discovery Initiative (ODI). We have been working diligently to increase transparency in the discovery ecosystem. See a few highlights below.

**ODI in Action**

**Open Discovery Initiative (ODI) Recommendations to Content Providers and Library Professionals.** Laura Morse led a Council on East Asian Libraries preconference workshop for Metadata Standards and Best Practices for East Asian Electronic Resources Taskforce. This session provided an overview of the ODI recommended practices, and in-depth review of the new library conformance advocacy materials, and small and large group discussions.

**ER&L Panel.** ODI member Marshall Breeding participated on a panel discussion at the ER&L conference in Austin, TX on April 4, 2016 on “The Role of Choice in the future of Discovery Evaluations.” Breeding set the context of the topic in his presentation titled “Choice in Discovery: Bundled or à la carte.” Other panelists included Neil Block, Vice President for Open Source Innovation for EBSCO Information Services, Robert. H. McDonald, Associate Dean and Deputy Director of Indiana University Libraries, and Curtis Thacker, Director of Discovery Systems at Brigham Young University.

**Discovery: Beyond Initial Implementation & Participation…and into OPTIMIZATION.** Julie Zhu and Scott Bernier presented on the impact of collaboration on discovery user experience and on the usage and value of library resources. They also touched on issues surrounding search origination as it relates to the statistical information that link resolvers may inadvertently hide, causing publishers and librarians to see only part of the picture of how and where usage occurs.

**Discovery Linking and Integrity.** Julie Zhu co-presented with Dom Benson of Brunel University London at UKSG on issues surrounding linking from discovery services. The session walked through linking to discovery targets, from OpenURL 0.1/1.0, to Index-Enhanced Direct Linking and Link 2.0.

**Current Initiatives**

**A&I Outreach.** A&I providers’ concerns differ from those of other content providers. The goal of the initiative’s work is to understand their perspective and consequent needs so that ODI can create recommendations for discovery services to be able to alleviate their concerns. The group has met with multiple A&I providers, and they have begun to summarize their findings. The initiative’s efforts will continue into the summer.

**Librarian Materials.** There are several new pages on the ODI website to provide information to libraries and librarians.

The first page is “Information for Libraries to Increase ODI Conformance among Vendors.” This page answers frequently asked questions about the Open Discovery Initiative and provides sample language libraries can use to request that content vendors who have not yet completed a conformance checklist do so.

The second new page is a guide to “Configuring Content Providers.” This is a directory of guides published by content providers to help libraries configure their discovery service to work optimally with that content. If you are aware of a configuration guide for a content vendor that is not on the list, or are a content provider who has such a guide, please contact us and let us know to add it.
To accommodate these new resources and make it easier to find all ODI resources from the ODI front page, we have also updated the site navigation.

**Discovery Service Provider Outreach Initiative.** The group’s primary task is to draft a set of recommendations for tools that would help Content Providers and librarians better understand what exactly is indexed within Discover Service Central Indexes. The group has been reaching out to all three stakeholders, libraries, Content Providers and Discovery Services, to determine which missing information would be most helpful to Content Providers and libraries and how that information should be presented. The group’s recommendations will be released in the coming months.

**Conformance.** The goal of this initiative is to make the process of submitting a conformance statement as simple and clear as possible. To that aim, the group has spoken to all of the organizations that have already submitted conformance statements to understand their obstacles and areas of confusion surrounding the filling out of the checklist. The group will soon release an FAQ to assist organizations interested in submitting a statement.

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

Library discovery begins with the discovery interface. Discovery services also need to ensure that users can reach other services on other platforms. The ODI recommendations include provisions to create an environment in which no content provider receives any preferential treatment from a discovery service and in which the library controls its own linking preferences.

Section 3.3.2 of the recommendation suggests:

- Discovery service providers should not discriminate in the methods employed to generate results, relevance rankings, or link order.
- In cases where the same content is available through multiple content platforms, discovery service providers should provide mechanisms to enable libraries implementing the service to establish preferences regarding which platforms to present to users as link targets, and in what order or priority.
- Discovery service providers should issue a statement annually explaining their business connections with content providers.
- Discovery service providers should offer an affirmative statement of the neutrality of their algorithms for generating result sets, relevance rankings, and link order.
- Discovery service providers should make other aspects of link presentation associated with a given result configurable by libraries.
- Discovery service providers should offer a seamless link from the discovery screen(s) to the A&I interface(s) utilized in the discovery service index.
- Discovery service providers should supply content providers and libraries with information when material changes are made to the discovery service that could impact the result set or relevance rankings or link order of results.

### 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.* Monday, June 27, 8:30-10:00 AM. Orange County Convention Center, Room W203.
ODI member Ken Varnum will provide an update on recent activities of the Open Discovery Initiative at an ALCTS talk on Monday, June 27. The presentation will include work to promote conformance statements from discovery vendors and content providers, impact of the ODI process on libraries, and the current state of interoperability among libraries, discovery platforms, and content providers via APIs and other mechanisms. Co-Sponsored by LITA and National Information Standards Organization (NISO).


ODI Member Elise Sassone will provide an update on ODI Activities during the NISO Update session! Learn more about ODI and NISO at this engaging session!

Please follow ODI on twitter!

Thank you - The Open Discovery Initiative Standing Committee