Deciphering Discovery
Best Practices for Evaluating and Selecting Web-Scale Discovery Services

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People choosing choice cuts of meat at Berg's Supermarket, circa 1950. OSU Special Collections & Archives. <https://flic.kr/p/aD5vnR>
"The challenge for academic libraries ... is to offer an experience that has the simplicity of Google—which users expect—while searching the library’s rich digital and print collections—which users need."

What is web-scale discovery?

User

Interface

Central index

Library catalog

Licensed databases

Open access journals

Digital collections

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What is web-scale discovery?
Building an evaluation process

1. Form an evaluation team
2. Educate library stakeholders
3. Schedule vendor demonstrations
4. Create an evaluation rubric
5. Issue an RFP
6. Interview current customers
7. Configure and test local trials
8. Draft recommendation report
1. Form an evaluation team

- Create a team that includes ...
  - Broad cross section of library units
  - Key stakeholders and representatives
  - Intended or potential users

- Draft a charge that includes ...
  - Vision and goals
  - Tasks and responsibilities
  - Timetable of deliverables
2. Educate library stakeholders

• Conduct research
  » Product information
  » Literature review
  » Environmental scan

• Disseminate findings
  » Project website
  » Staff workshops
  » Progress reports
3. Schedule vendor demonstrations

- Set the agenda
- Maximize participation
- Schedule visits in close proximity
- Record sessions for future reference
- Invite community feedback
4. Create an evaluation rubric

- Assess user needs
- Develop a list of product requirements
- Categorize and rank requirements
- Evaluate products based on how well they match your requirements
## Sample evaluation rubric

<table>
<thead>
<tr>
<th>Category</th>
<th>Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>Product A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Weight</th>
<th>Score</th>
<th>Points</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1 Smart searching</td>
<td></td>
<td></td>
<td></td>
<td>Weight Scale 1 = Optional</td>
</tr>
<tr>
<td>2.2 Advanced searching</td>
<td></td>
<td></td>
<td></td>
<td>2 = Desired 3 = Mandatory</td>
</tr>
<tr>
<td>2.3 Search limits</td>
<td></td>
<td></td>
<td></td>
<td>Points = Weight x Score</td>
</tr>
<tr>
<td>2.4 Faceted browsing</td>
<td></td>
<td></td>
<td></td>
<td>Explanation and rationale</td>
</tr>
<tr>
<td>2.5 Scoped searching</td>
<td></td>
<td></td>
<td></td>
<td>for score</td>
</tr>
<tr>
<td>2.6 Visual searching</td>
<td></td>
<td></td>
<td></td>
<td>Scoring Scale 0 = Does not</td>
</tr>
<tr>
<td>2.7 Relevancy ranking</td>
<td></td>
<td></td>
<td></td>
<td>meet 1 = Barely meets 2 =</td>
</tr>
<tr>
<td>2.8 Deduplication</td>
<td></td>
<td></td>
<td></td>
<td>Partially meets 3 = Fully</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>meets</td>
</tr>
</tbody>
</table>
5. Issue an RFP

- Institutional profile
- Product requirements
- Timeline of deliverables
- Terms and conditions
6. Interview current customers

- Strength and weaknesses of the product
- Experiences working with the vendor
- Reception within the community
- Data collected from user studies
- Questions about implementation
7. Configure and test local trials

- Try before you buy
- Test with local collections, staff, and users
- Key areas of testing:
  - Coverage
  - Usability
  - Relevance
8. Draft recommendation report

- Use data to make an informed decision
- Document decision and supporting data
- Communicate findings to library community
Key principles for best practice

- Inclusive
- Goal-oriented
- Data-driven
- User-centered
- Transparent