Yes, the Library Can Help You With That Too

Michelle Valiani
Yewno

Lisa Janicke Hinchliffe
University of Illinois, Urbana-Champaign

Michael Levine-Clark
University of Denver

Jim O'Donnell
Arizona State University

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Yes, the Library Can Help You With That Too

Presented by Michelle Valiani, Yewno; Lisa Janicke Hinchliffe, Professor, University of Illinois, Urbana-Champaign; Michael Levine-Clark, University of Denver; and Jim O'Donnell, Arizona State University

The following is a transcription of a live presentation at the 2017 Charleston Conference.

Michelle Valiani: Welcome. My name is Michelle Valiani. I'm a channel partner manager with Yewno. I think most of you have heard or seen Yewno this week, being that we are on your nametags. So, thank you for being here with us this morning. Here today this panel will discuss the wide range of user types and needs across higher education as well as approaches to knowledge discovery and user engagement that go beyond traditional methods. The discussion will focus on not specific tools and systems but rather current and planned initiatives to serve and adapt to the community. Our panelists hope to propel innovative ideas and conversations and to raise the key questions that libraries may be asking themselves. So, I'm honored to be here today and I'm happy to welcome our three experts from a variety of backgrounds: Jim O'Donnell from Arizona State University, Michael Levine-Clark from the University of Denver, and Lisa Janicke Hinchliffe from the University of Illinois Urbana-Champaign. We're going to start it off with some brief talks from each of our panelists and then have some questions and answers prepared as well as have plenty of time for questions at the end of the session.

Jim O'Donnell: So, thank you, Michelle and good morning, everybody. I want you pause for a moment to realize that this is that rarity of American academic performances: an entirely flyover panel. We come from the Central and Mountain Time zones only and you don't get to see that very often. Cherish it while you can.

So, I'm going to spend my five minutes encouraging you to think outside the box, but I have a particular box in mind. It's more metaphor than not. It's really struck me in the last year as we've been rolling out a new ILS, as we've been doing major renovation planning for our central facility, just how much what we do is still acting and thinking inside the box. By the box I mean in our case the one we built in 1966, the Charles Hayden Memorial Library. Almost brutalist—sometimes I want to take a poll of how many of us work in buildings that are called “brutalist” because

everybody built one in 1966, but ours is pretty good. It's got good bones. We're going to do things with it; but it was built as a box. There's another box across the street that wasn't big enough anymore. It was called Matthews Library. So, we built a bigger box. We've spent the last 50 years cramming more stuff into the box. What was originally the main floor with reserve and circulation and open seating is now a stack floor. We've got stack floors. Some of my routine with people we are recruiting has been to take them to the third floor, take them off the elevator and say, “Look around you,” and they look around them and I say, “You've now had the complete tour of the building. This is what it is.”

When we began to process digital information, we continued to treat it as though it was stuff we were bringing into the box. Even our business practices followed that. When we get a consortium together to do a deal for us, at the end of the day we still pay for our share of stuff to bring inside our virtual box and we've got systems folks who are figuring out how to host it and link to it and connect to our ILS. The digital content that we license is still inside the box. My great learning of the last three years is that our users don't care about the box anymore. They don't care where the stuff is. They don't care where it comes from. They're impatient about hearing what we pay for. Our faculty at ASU do not have the deepest and richest collections to draw upon. We only became a university in 1958. We've got some weaknesses, but our faculty are happy because we've got expedited ILL, we've got a variety of techniques for bringing material into our box from all over, but our ILS and our way of thinking and even our way of acting is still, to my eye, too much focused on what it is that ASU happens to own, not what is it that our users want.

I've been using as an informal motto the motto of Harrods in London. It is a good motto. You can tell because it's in Latin, as all good mottos should be: “omnia omnibus ubique.” “Everything for everybody everywhere.” That's a pushy motto for Harrods to have acquired 125 years ago, but it's a pretty good motto for libraries today if you think about that as well. If our users want something, my principle is we

should be able to go out there and find it for them as quickly and seamlessly and untroubledly as possible.

So, what I have to say about discovery is that discovery needs to get us outside the box as far as possible. It needs to be focused on the needs of users, academic users. It needs to have quality discriminations built into it that a Google search does not have, but on the other hand it needs to be discriminately indiscriminate in seeking resources throughout the world, throughout the digital space we live in, wherever they happen to be. I don't think we're going to get one tool that does that for us, but as we put together our basket of tools, we need to think about how that integrates so that even the 19-year-old at ASU from Casa Grande, first in his family ever to go to university, can sit down with the tools we provide and find whatever they happen to need quite without regard to whatever history it is we as a university, we as a budget, we as a library, we as a box have had. So, that's simply my message. We need to think and act outside the box. I have one more prediction. I know these folks. I have a pretty good idea we're going to wind up agreeing about a whole lot of things and if we just say the same thing three times you should take that as evidence of just how wise we are. Thank you.

Michelle Valiani: All right, our next speaker is Michael Levine-Clark who's going to be discussing the library as a function not as a tool, a useful starting point for users, a few dead ends, and keeping students in the library's resources. Welcome, Michael.

Michael Levine-Clark: Thanks, Michelle. It's always tough to follow Jim. I do agree with everything he said. I've been talking for a long time about the fact that, as a person building library collections, we're using the wrong terms and we're thinking about "the collection" incorrectly. We should be thinking about content. We should be thinking about getting our users to things wherever they may happen to be. The collection is a very small piece of the huge range of content out there. We need to go far beyond the traditional library collection, and discovery needs to help our users get to that content, wherever it may be.

Discovery is a function. It's a process, yet very often when librarians discuss discovery or say "discovery" what we mean is Summon or Primo or EDS. We're talking about a discovery tool and that's the wrong way, in my mind, to think about it. There should be many discovery tools. There shouldn't be just one.

Using just one is clearly not effective. We should be talking about tools that complement each other. We should be thinking about ways to get our content to where our users happen to be, not getting our users to the discovery systems that we think that they should be using. We know from all sorts of evidence and from anecdotes and from observation that our users often don't start with library tools at all, right? They start with Google or Google Scholar or Wikipedia or some other source that is not Summon or Primo or EDS or the library catalog and that's, I think, actually fine. We just need to figure out how to get into those spaces. We should try to think about how those sources work well and why they work well and why we and our users repeatedly go to Google and Google Scholar rather than going to the discovery system. What can we do within our systems to make them more appealing to users and how can we get ourselves out to those other systems?

I was on a panel yesterday—an Elsevier panel about a tool called ScienceDirect Topics where they've run an algorithm across all of ScienceDirect to build reference pages, pages that define a topic by pulling things from a variety of different Elsevier published sources. It's really nicely put together and it shows up well in Google searches and then brings you right back into that content, wherever it would be. Imagine that on a broader scale with content from Oxford University Press, from open sources, from a range of different resources that then drive you into library sources. There are many different ways to think about getting people to library content that have nothing at all to do with the discovery tools that we've invested in.

That said, we also as libraries should be thinking about broadening the choices for discovery beyond the traditional sources that are text-based, beyond the sources that are trying to replicate in some way the library catalog. One example of this (and this is a panel that was put together by Yewno, but it's not a Yewno pitch) is that at the University of Denver we signed on with Yewno because it's another choice for users to get to content in a way that is creative and interesting. It is not about keyword searching. It's about identifying concepts and then looking at those concepts and how they relate to each other, which drives the user to content in a way that is different and perhaps is more effective for some types of users and some types of uses. We will continue to try to expand those types of choices for how to get to content beyond the single discovery system

while also trying to make that discovery system as good as possible.

So, our goal at the University of Denver is to provide a range of options that serve the user and that serve different uses at different times. Because often we talk about “the user” but the user has different use cases and the same user may have very different needs at any given time. We want to make it as easy as possible for the user to get to content. We want no dead ends. I would much rather figure out a way to pay for something on demand than allow the user to go away empty-handed. I would much rather figure out a way to acquire something on the spot or to have it subscribed to initially or to bring somebody open content than to have a firewall and have somebody stopped at some point. So, I’m echoing Jim here that we do want access in some ways to everything, but with obvious exceptions. We don’t want to make it so difficult that the user can get buried in a sea of information, but we also want them to get the information they need at the point of need, and I don’t think we do this nearly as well as we should. So, thank you.

Michelle Valiani: All right, next, with Lisa, what can we do, what should we be doing, what do the students need and/or all of our university constituents, and what will they need?

Lisa Janicke Hinchliffe: Thanks, Michelle, and thank you to all of you who are sticking it out to the very end here. It’s always interesting to talk about discovery, and Damon Zucca from Oxford University Press said something yesterday that I thought was really a wonderful take on it, which is many of us have struggled with the idea that somehow or another people aren’t using the library, but he made the point that we actually live in such an exciting time. I mean, it used to be a few people looked up some things some of the time and now we all look up stuff all the time, right? So at this point it’s kind of librarian Nirvana, except it’s become a little confusing for us. So, I’m going to put forward to you that sitting behind everything that both Jim and Michael have said so far, and I think a lot of the dialogue around discovery, is really this notion of the user, but one of our challenges is to make that user meaningful for us in a way that isn’t a platitude, and that is able to be operationalized in context, and one of the things that I think is particularly important for us to remember is that search is not discovery. So, search is one kind of discovery but discovery is actually a much kind of larger act or greater scope of things. And so myself,

for example, I’m a very active Twitter user. Some of you know, LisaLibrarian. That tells you how long ago I got my Twitter name if I got to have that name, right? That’s actually one of my primary discovery tools, right? It’s not because I’m going out and doing keywords, it’s because I’ve curated lists of experts whose advice, whatever Lorcan Dempsey is reading I want to be reading, okay? That’s a simple example. I’ve got a list of those people; I pass this along to my grad students. I don’t tell them to go first to search the library science database even if its name is LISA, different kind of Lisa!

So, one of the things that we have done at the University of Illinois, and some of you may have been able to hear my colleagues Michael Norman and Bill Mischo speak yesterday about our current state of our discovery system and our Bento display, is that in 2014 to 2015 we embarked upon a very intentional decision to become evidence-based and usercentric in our framework for discovery development, and that meant moving beyond some of the platitudes, some of those things about, “Well, we just need to be like Google. Everyone wants everything,” and really doing a dive and saying “Right, but what do University of Illinois users want?” Because that’s the community that we are deeply embedded in and seeking to serve and maximize their discovery.

One of the things we were able to do was to go back over, if you can believe it now, 2005 was when we wrote our first report to ourselves on discovery when we attempted to implement Web Feet. We had also at some point then developed our own local service, which we called Easy Search, which remains today our discovery layer or tool on our website. We’ve also piloted Primo and wrote a report to ourselves about that, and we currently also have EBSCO EDS. Now interestingly you can hear that we’ve been buying discovery services all along but we’ve not made them our discovery layer, but instead we’ve been using them as tools and targets in order to serve our users and we’ll push on that in a second here.

When we looked back over our library reports, we realized that as librarians we valued transparency, predictability—or at least explainability—of the interface, customizability and co-development opportunities. Now, those are things we valued as librarians but I think when we also wanted to say “Okay, that’s what we value,” and we know there’s good reasons for us to value things like predictability and transparency because our users do like when things work the same and develop a habit, but we

are also able to go back and look through an entire decade of user surveys where we had surveyed undergraduate students, graduate students, faculty, postdocs, all of our users and by looking across a decade, we could take and look for those principles that we could extract that weren't about the particular moment in time, and the grad student I had working with me at this, at one point she came to me, she's like "Wow! 2001, they were really mad at you guys." I was like "Oh, yeah, well we kind of had a 2K problem, and we had to rush an implementation at a new ILS," by the way she was like 12 at that point so none of this 2K thing made sense, but I was like yeah, they were really mad at us. So, if we'd only taken that as episodic, you take a very different view, so we extracted that.

We were able to see that a review of our user surveys told us that users want seamless content delivery, seamless digital delivery. They want coherent discovery pathways. And I want to be very clear. Coherent discovery pathways is not the same as a single discovery pathway. They wanted things as simple as possible but not simplistic, so we have some very sophisticated users on campus who were frustrated when we're putting them into interfaces that they felt were simplistic. Interestingly enough, we also see this very important nuance on this idea of everything. They actually don't want everything. They want what we call "my everything." Okay? The chemist is not desperate for the humanities articles to show up in their search results nor vice versa in most cases. So, when they say everything, they mean a view of the world that's revolving around them, "my everything and I don't want the rest of that stuff." They also value transparency, predictability, and, finally a value that somewhat hurts in some ways if you're in user services, they wanted independence. They do not want to be reliant on librarian explaining. We also did an extensive analysis of our logs of our Easy Search in 2014 to look at all the user tasks we had to support, because it's easy to think that the tasks that the users are doing are the ones that you help them with, but it turns out there's a lot of tasks users are doing and they might be doing more of one kind than another, so we realized they had to be able to locate known items, known research tools, which is slightly different than a known item. They had to be able to explore a topic. They had to be able to identify resources on a topic. They also needed to identify research data and tools and had to identify assistance. So, all of these things taken together allowed us to be very evidence-based about what our discovery environment needed to be.

So, we realized that the library had to sit within the user workflow, requiring personalization and customization. So, unlike Google which presents a uniform experience, our users were not asking for that. They were asking for an experience that was for them. They wanted full library discovery, content services, and spaces. They want the fewest steps from discovery to delivery and our goal is that discovery is delivery. They want everything that we own or license to be discoverable, so no more hidden collections. They also wanted a simpler environment, so we committed to fully develop but deploy fewer tools. We pursued wide-scale implementation of adaptive and contextual assistance. We also pursued consistent language and labeling. No good labels for your open URL resolver, but at least use the same label everywhere. And then, of course, we wanted the greatest discovery and delivery at the lowest cost. So, all of these things—those may or may not be the discovery principles for you, but as a user myself, I know that that's what I want in my discovery experience, at least as far as the library.

So, this is a story that we started in 2014 and continues to drive our development today, and I think the other key piece about that is it continues to drive our development, and if you look at our Easy Search interface in 2014, '15, '16, '17, it is not the same interface because we continue to iterate on it based on users' needs and the data that we're gathering and looking. So, for example, just in the last year we realized that we had a number of times where people are increasing—we see an increasing number of DOI-based searches, so they're trying to use our Easy Search like they use SciHub, DOI based. We had to build in greater support for DOI searching because we were able to see a number of cases where DOIs are not resolving and unfortunately when they don't resolve and they don't resolve to CrossRef, it's a completely unintelligible situation. We put in some DOI punctuation correction that we know we can see people make common mistakes with. So, ultimately what this meant is that we did get out of the box because one of the things that we did is Google and Google Scholar sit within our discovery environment on our page. So, we are smart enough to know that our users do want full content discovery, but interestingly they want it in this context that's personalized and customized to them. So, I think we'll continue to see us developing these and really pushing on ourselves to be embedded within the user community that we intend to serve, which is the University of Illinois at Urbana-Champaign, which may or may not be the user community that you have, but perhaps this

story of looking at what we value, what users value, and what users do, give you a sense of how you can work to a set of principles that can then drive your development of your discovery environment.

Michelle Valiani: All right. Before we open it up to the audience, we do have a few specific questions for our panelists. The first question is for Jim O'Donnell. Jim, how do we let students know about the wealth of resources and collections available to them?

Jim O'Donnell: We do that job poorly because the students do not wake up in the morning and turn on their devices and check in with the library first thing the way they should. So, we need to be better at every form of marketing and sales imaginable. Here I'll just say that one part of that is redesigning our building so that when they come in to do their calculus homework they see stuff and they get in contact with special collections exhibits, carefully selected and curated print. I'm going to have a conversation after yesterday with Brewster Kahle about how we can in the physical library create pointers and showroom effects that would lead beyond to the good work that they're doing at the Internet Archive. Too few of our students know about the Internet Archive. Short answer to your question is we'll try anything, and it's tough because they're not waiting their attention on us, but it's a little easier because they do want to find good information and when we show them how, when they learn how, it turns out to be pretty sticky.

Michelle Valiani: Thank you. All right, our next question is for Michael Levine-Clark. Michael, it is commonly stated amongst institutions that there is a user-focused reason we take these specific approaches to discovery and the landscape for discovery is often unique to each institution to apply to your user needs. So why is the makeup among schools often different yet Google is uniform?

Michael Levine-Clark: Thanks, Michelle. I'll start with the why Google is uniform. Google is uniform because Google is pointing everybody everywhere to content everywhere. It is not trying to work for a specific user group. It's not trying to work for specific collections. It is trying to find everything and it seems to me that what libraries need to do is to try to figure out how to customize aspects of Google for their user community. One example of this that I'm interested in and we're going to be piloting is a tool that ReadCube is developing that allows you to

get to content for your institution through Google and Google Scholar and PubMed and all sorts of other spaces wherever you happen to put this link. Now you can do that with Google Scholar already by telling Google Scholar that you're affiliated with a particular institution, but this does a little bit more than that in that it gives the user some choices about how to configure it. Also, there is an entire ReadCube community and if someone happens to be a ReadCube member already, it'll work for them with the institution they're affiliated with. It gives the user access to the library's licensed content first, if that's how you want to configure it, and no need to do anything further. The library's version comes right to you through the ReadCube application. Secondly, it gives you access, or if you want to configure it this way primarily, it gives you access to an open version somewhere on the Web. From there you can do any number of things as you configure it, and what we're going to be doing is trying to do an option to buy that article on demand for readers in certain cases with certain price points, and then after that it'll give them an interlibrary loan option. This is one of many ways to think about making that Google experience work for a user from the University of Denver and in a way that makes sense for that particular user. Another way to think about it is BIBFRAME. With BIBFRAME you can get your collections out onto the open Web. So there are number of ways to think about how to make the library collections and the library resources, the resources that our users want and need, available to them in a way that makes sense for that particular group.

Jim O'Donnell: Could I just for a second, I want to take a little exception to the idea that Google is uniform. If I start a Google search right now on this device and type the letters CH, the predictive first hit is Charleston Conference 2017 full program. I can tell what I've been doing for the last three days. That wouldn't be true for lots of other people on the planet. I was impressed; Lisa was talking about putting punctuation correction into DOI searches. Yes, right, good idea, make a note, but I think we've actually got systems that do too little of that intelligent adaptation now and we should be trying to find ways to do that. When I typed in CH to get the program, I'm not creeped out anymore the way I was when these systems first got smart, and that's all right.

Michelle Valiani: Thank you, and Lisa Janicke Hinchliffe, so, what can we do, I'm sorry, Lisa, how do we know what our users need now and how

do we forecast what they will need next year, next decade, etc.?

Lisa Janicke Hinchliffe: Great, and I think I'm going to stand up because I can see people sort of attempting a line of sight at us sitting down and so we're not up on the stage. So, I think it's not going to be a surprise that I'm going to say we have to be evidence-based about this, right? So, what do people need now? We can look at what they are doing but I think now is actually too late, right? So, our discovery development has to be thinking about because we need development time, so our discovery development has to be thinking out probably like 18 months to two years so that we have things coming into place when a user starts to expect it as sort of a predictable experience or a desired experience. Now this is a little trickier, right? But we are smart and it's not too difficult to start to see, right? I think we know who's setting our user expectations based on retail Web and general Web discovery, right? So, we can look at these systems and see where they are, and we can read their development paths and see where they're going. It doesn't mean we're going to do all of those exact things, but we can start to see what is expected or what at a minimum what would be valued? For example, Jim's example that his saying Google's not uniform. I'm going to argue that that's actually a uniform experience because it's now a uniform experience that Google always bases your predictive stuff on what you've been doing already, what it knew about you, but I get the point that we will get a different result based on what we've been Googling. I had bookmarked the program, so I didn't keep Googling it, but you know, different generations. So the other thing I think we can do is we can also think about who is going to be in our user community next. Now for me I can guarantee that of my 50,000 students on campus, 7,000 of them are going to be new to my campus every fall. And at least of those 7,000, about 4,500 of them are going to be 18 or 19 years old. Now your population may be different but Illinois is still a very traditionally aged undergraduate population. So, all I need to do is to read the reports that Pew and other people

are doing for me about what high school students' expectations and behaviors are and I can be pretty sure that those behaviors are going to show up on my campus in August, okay? Likewise, if I'm paying attention to graduate education, generally speaking, I can have some sense of who the faculty are going to be who are showing up or in certain fields it's going to be postdocs. So, that's one area I was looking at the user groups.

The final thing I think we really should do more of and something that both ACRL and ARL have been doing a bit more of in their sort of encouraging libraries to plan is to use scenario thinking. Now scenario thinking is not the "be all and end all." My husband actually studies decision-making and he and I had this, as one does in an academic marriage, long discussion about the value and dangers of scenario planning as decision-making tools, but I think that they have been particularly helpful for librarians in this area, which is ask yourself "what if" questions, okay? So, Aaron Tay in Singapore has asked himself a very provocative question. What is the role of libraries if everything is open access? That's not a prediction that's happening tomorrow, but what is that going to look like, okay? What happens tomorrow if ResearchGate goes away, right? What happens if it doesn't go away and it grows, right? Asking ourselves these scenario questions that help us start to think about what the future could be and looking at the commonalities in there. So, I'm a big fan of forecasting in these different ways, so I think looking at current users but also future users in a really evidence-based way. And I'm going to say one other thing, which is I think we really have to look at them and make sure we're observing what they do do, not what we wish they did. Now, I'm an information literacy librarian. I'm all about helping them move toward better, more efficient, more effective strategies, but I can only do that if I base my instruction in reality about what they currently believe and act.

Michelle Valiani: Thank you, Lisa. All right. I think we've done a great job with our timing and we have plenty of time for questions from the audience.