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# Libraries' Strategic Stewardship of their Users' Discovery Experience

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# Libraries' Strategic Stewardship of their Users' Discovery Experience

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The discovery of content is an historically important role of the library, achieved through a combination of effective cataloging and classification, open browseable stacks, abstracting and indexing tools, reference support, and other services. In recent years, however, user practices associated with the discovery of content have changed dramatically. For example, from 2003 to 2009, the share of faculty members that reported starting their research from the library building or the online catalog has declined steadily from 42% to 21%, with declines observed across the disciplines and across institutional types.<sup>1</sup> In a discovery environment increasingly dominated by Web search services such as **Google** and **Bing**, libraries are grappling with what their discovery role may become and how best to serve their users in that role.

Significant efforts have been made in recent years to make library collections more readily discoverable in this environment. The deployment of *worldcat.org* as an openly accessible resource online, linked to from Web search engines and linking out to individual libraries' holdings, has been a significant milestone for the materials it contains. Attention is now turning towards how other kinds of library holdings can be better exposed for discovery online.<sup>2</sup>

There are also key questions about how best to meet the needs of a focused community of users served by a given library. Would a Web search service starting point, which seems to be emerging for large classes of users today, suffice? Libraries must respect user workflows as they evolve in the face of widespread environmental changes, but they may also have a role in helping to shape these workflows in realistic ways. For this reason, in the recently released *Ithaka S+R Library Survey 2010: Insights from U.S. Academic Library Directors*, my colleague **Matthew Long** and I explored some of the priorities and strategies being pursued for discovery.<sup>3</sup>

Library director respondents seem to indicate that, more than just playing a role in supporting discovery, they view the discovery function as strategically vital to their organizations and want to play, and be seen as playing, a gateway or starting point role in the discovery process. As Figure 1 shows, 84% of respondents agree that "It is strategically important

Figure 1 Strategic Value of Discovery

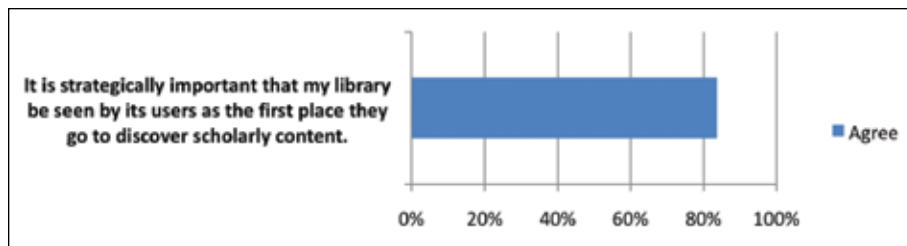


Figure 2 Importance of the Gateway Role, Library Directors and Faculty Members

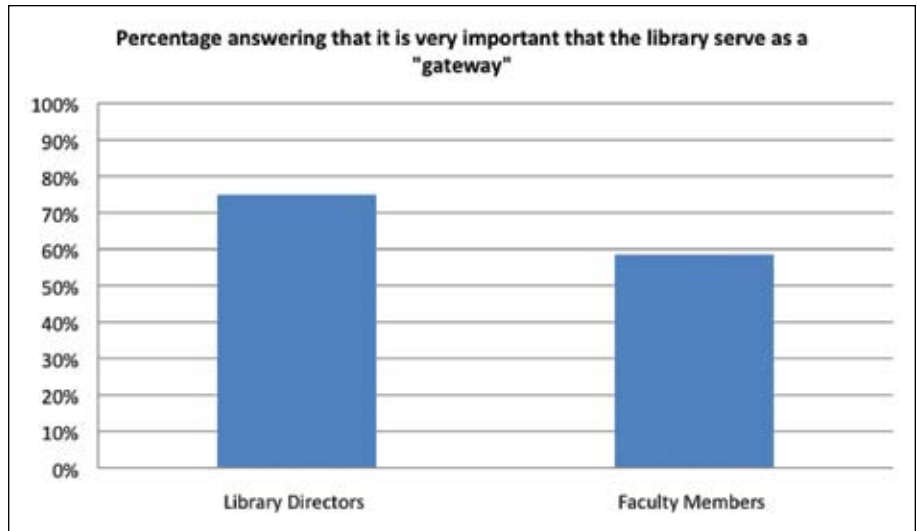
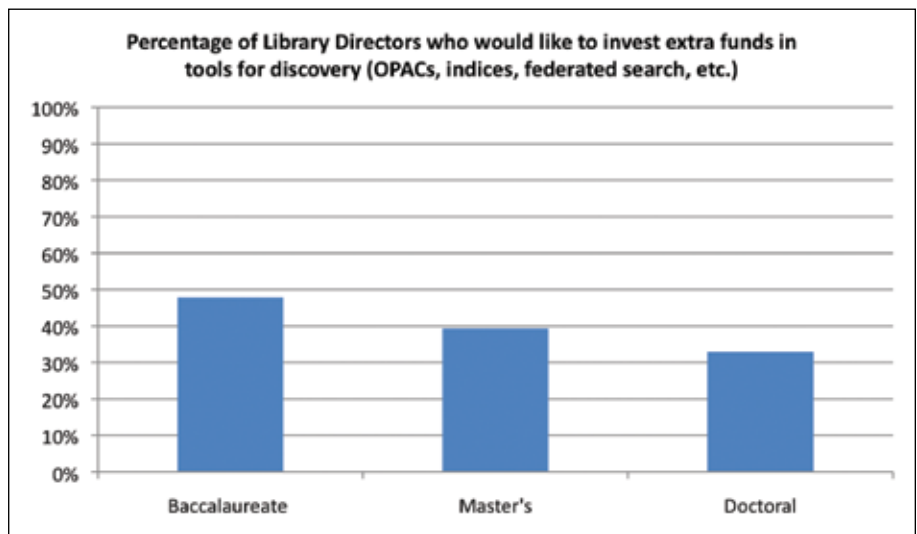


Figure 3 Investment in Discovery Tools



that my library be seen by its users as the first place they go to discover content," with only a trivial share disagreeing with the statement.

Figure 2 similarly illustrates that over 75% of library director respondents agreed that it is

important that "The library serves as a starting point or 'gateway' for locating information for faculty research," a share that is nearly 20 percentage points higher than faculty member respondents in the *Ithaka S+R Faculty Survey 2009*. Indeed, the share of faculty members valuing this function has been in steady decline since 2003, matching their shift towards network-level discovery tools.

There are many reasons why library directors might view the gateway role as more valuable than do faculty members. Library directors might see the library as uniquely well positioned to sustainably provide a neutral discovery service for researchers. They also might be especially focused on serving as a starting

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point for students, since discovery and filtering are key elements of developing information literacy. Still, the fact remains that library directors are more committed to serving, and being seen as serving, as the discovery starting point or gateway in comparison with faculty member support for this function.

Indeed, many library directors are prepared to invest significant resources in this function in the coming years. More than 40% of respondents would direct additional financial resources towards providing more tools for discovery (the second largest priority of numerous budgetary possibilities the questionnaire proposed). There is an important difference among institutional types, with roughly half of baccalaureate institutions prepared to direct additional financial resources to discovery tools as contrasted with notably lower shared of master's and doctoral institutions, as illustrated in Figure 3. In the ranking of how respondents prioritize staff resources, building local discovery resources was fourth out of six choices.



Finally, we asked how much priority libraries place on local discovery tools versus those provided by an outside vendor (such as a Webscale discovery service), or those that might blend outside resources with local tools. While library directors see recognition for a starting point role as strategically important to the library, more respondents rated "facilitating discovery through outside resources" as important than rated local discovery tools as important. Virtually no respondents failed to select at least one of these three strategies as very important for their library.

These findings suggest that the environment for discovery is highly unsettled among academic library directors, at least. The flux associated with discovery has been great; Web search engines and their scholarly services have significantly displaced pre-existing dynamics, and now federated search and metasearch options appear to be giving way to "Webscale discovery services" as a possible solution for libraries. What strategy is your library pursuing for discovery? Do you have a single strategy for all user groups or differentiated strategies, for example, for faculty members and students? Will Webscale discovery services provide a compelling fit with user workflows that thus far

seem to be moving towards Web search engines as their default starting point? Is the discovery role really as vital as so many library director respondents indicate? If so, how can libraries work effectively with their user communities best to provision it? As many library directors have indicated that they are prepared to invest significant resources in discovery tools, this is probably a good time for many libraries to pursue a thorough assessment of their overall vision and strategy for content discovery. 🌱

#### Endnotes

1. The *Ithaca S+R Faculty Survey 2009* found that 47% of faculty members start their research with a specific electronic resource and 31% with a general-purpose search engine. **Schonfeld and Housewright**, 5. Broadly similar patterns were documented among undergraduates as well in **De Rosa et al.**, 1-7.
2. See the recent strategic planning exercise from the **University of Minnesota**, that culminated in **University of Minnesota Libraries**, "Discoverability: Phase 2 Final Report," September 27, 2010 (**Cody Hanson** and **Heather Hessel**, project co-chairs).
3. Available at <http://www.ithaka.org/ithaka-s-r/research/ithaka-s-r-library-survey-2010>.

## Something to Think About — New Styles for Old Problems

Column Editor: **Mary E. (Tinker) Massey** (Serials Librarian, Embry-Riddle Aeronautical University, Jack R. Hunt Library) <masse36e@erau.edu>

We usually have a problem in libraries of making information available to many different patrons. I have seen libraries change from the card catalog to the online catalog, Dewey Classification to LC Classification to a myriad of mixed classifications, and still the problem persists. How do we provide information, and how do we make it more accessible to people? Changes have also occurred in the formats of information presentation. In the seventies and eighties, there was a predominance of print formatted materials with some microforms available. The nineties brought alternatives in media and a new adventure in the digital format. I have seen them come into use in libraries, and I think the digital has been received by patrons as a ready source and acceptable to their quick needs. The technology allows for home/office distribution through the Internet/emails and enhances delivery of information to patrons all over the world. At **Embry-Riddle Aeronautical University**, we have a 24/7 worldwide reference service. Special Internet messages/queries are received by Reference Librarians, who gather the information in many formats



and scan that information, where available, back to the patrons. The combination of digital replies, print and media loans, and Internet URLs makes a complete and timely package for the queries received. We have also experienced a number of instances when our Internet connections were not available, for example, after the tornado strike and the drowning of our server after a severe rainstorm. We have always tried to be prepared by purchasing a back-up system in print or microfilm/microfiche that covers the majority of important materials requested by users. This also helps when the library is busy with requests. We have even purchased a number of conference proceedings and archives on CD-ROM that allow us to access information through another format. We have even solved a problem when the U.S. government begins to stop print and produce serials solely online. A number of our classes require longer scrutiny of materials, so we have found that downloading these documents (where no copyright clearance is needed) from the Internet to CD-ROMs

gives us a back-up and protection against computer downtime. Some regular journals have given us permission for the in-house CDs as well. Our ILL Department is another area that allows for upgrades of technology and systems that create more speed and efficiency in the information delivery. With the advent of **Ariel** and management products such as **CLIO**, we have been able to enhance our ability to provide information to many. Another method of supplying offbeat information is our "vertical file" system that houses a number of items related to the aeronautical and aerospace industries. Sometimes fliers and other promotional materials account for knowledge that appears nowhere else in published form. There are personal items, such as diaries, letters, or logs that also provide substantiating information of a personal nature that cannot be found in the print format, and we keep these in the archives area. We look for information in many places and formats. As the world creates more of these to peruse, we continue to collect, organize, and preserve these materials for future generations. The trick is keeping your eyes and ears open to the changes and creative ways that are available. How many different ways do you have for backing up your information systems? This is probably something worth thinking about! 🌱