

¹ NIH Library, Office of Research Services, OD, National Institutes of Health; ² Himmelfarb Health Sciences Library, The George Washington University

Background, Description & Project Questions

Background:

Many institutions have recently adopted shared library service and discovery platforms that search across multiple libraries at an institution or between different libraries that participate in a regional consortium. For medical libraries, platform consolidations create questions about what content should be made available for discovery to best serve the research needs of health science specific users. Is it better to set a default search scope that allows users to see the full range of shared content or to tailor the search scope and prioritize health science specific content? The Himmelfarb Library Assessment Committee evaluated two potential discovery search scopes and made recommendations to benefit library users.

Description:

- Himmelfarb joined the Washington Research Library Consortium in 2018, migrating to the Ex Libris Primo VE platform for discovery. Primo allows for the use of multiple search scopes with one designated as the default.
- Himmelfarb's original default scope included local catalog content (physical collections and purchased e-books) and Primo CDI content (subscription electronic and open access content) to match the content available in the previous discovery service. Most other consortium libraries set an "Everything" scope as the default, including print content from all the libraries and CDI.
- In Fall 2023 Himmelfarb's Assessment Committee designed a qualitative usability testing project comparing results from the default scope and a search scope that includes print content from other consortium institutions.
- Following the qualitative testing, the default scope was switched to one including print consortium holdings for a three-month trial period with an anonymous feedback form available.

Project Questions:

- How does the catalog scope in a consortium environment impact user experience?
- How can libraries effectively tailor user experience in a digital environment?
- How can medical libraries prioritize unique user needs in a shared catalog?

Challenges & Next Steps

- Response to the feedback form was lower than expected and users shared unrelated search issues
- Consortium loan/interlibrary loan usage for Spring 2023 and 2024 will be compared to assess impacts of the search scope change
- A focus group assessment is planned for late summer/fall of 2024

Discovery Scope Defaults & Consortium Scope Results

Qualitative Search Analysis

In fall 2023, five staff members from Himmelfarb's Assessment Committee collaborated to examine the results of searches performed across both catalog scopes. Each staff member conducted one search per scope in each of the following categories: Keyword, Author, Monograph title, Serials title, Serials article, and Miscellaneous. A total of 28 searches were conducted comparatively across the two catalog scopes.

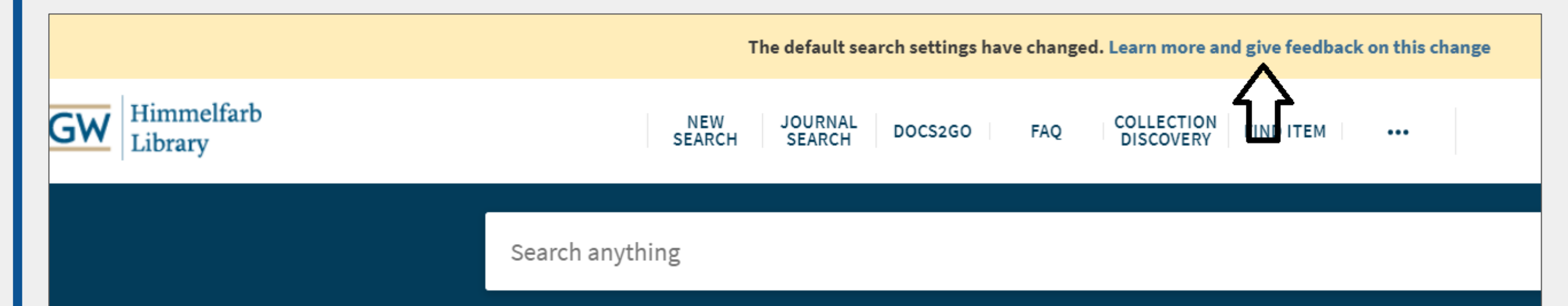
Keywords searched were representative of our library context (e.g., "Cancer," "Classification of thyroid neoplasms," "DVT Treatment," etc.).

Findings demonstrated similarities in the results returned by most searches across the two scopes. The Articles + GW & Consortium Catalog results included print materials from other libraries, but CDI results (those coming from the Primo Central Index) remained consistent with the default scope. Some changes in results ranking were also noted. Findings were shared with the library's administrative team with a recommendation to temporarily change the default scope.

Embedded Survey & Results

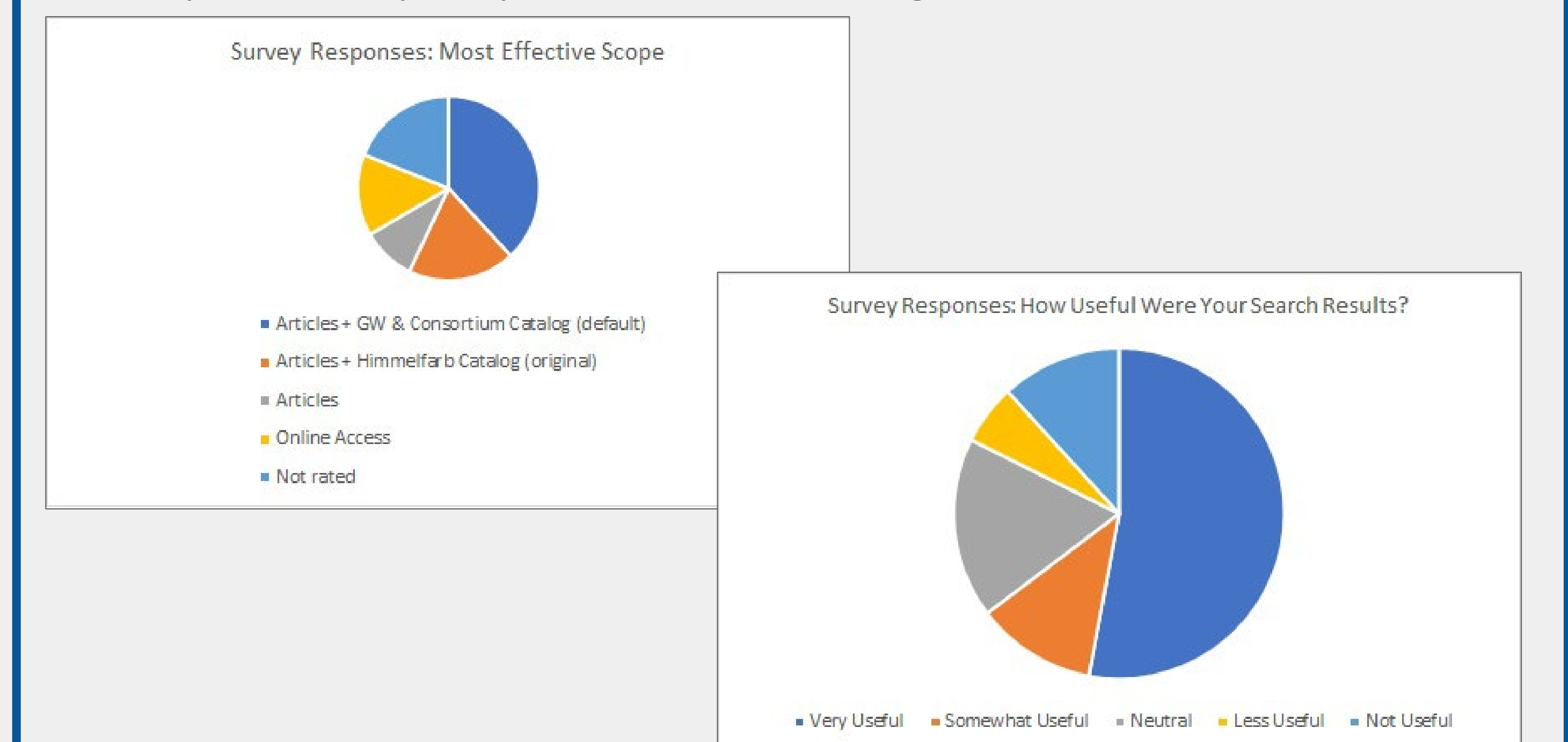
The administrative team approved temporarily changing the default search scope to Articles + GW & Consortium at the start of the Spring 2024 semester with a survey feedback form (see below) for users to share their experience embedded in the discovery service. The scope change and survey were advertised to users through the library's news blog, social media channels, and direct outreach via student and faculty listservs and newsletters.

Himmelfarb's Web Services Librarian developed a JavaScript snippet to inject a feedback banner on Primo pages with the survey link as HTML on page load. This resolved an issue with the vendor's alert banner function which relies on the CSS content attribute and can't be used to insert a link.



Feedback form survey questions:

- User status and affiliation. Respondents were invited to submit their email address for follow-up and possible recruitment to a future focus group.
- What they were trying to find (search statement)
- Rate their search results using the new default scope on a scale of 1 to 5 (1 = "Not Useful", 5 = "Very Useful")
- If any of the other search scopes were used, which had given them the most useful results
- An open-ended prompt that allowed sharing other feedback



Survey responses:

- 21 responses were received with an average score of 3.8 out of 5 on effectiveness of search results in the new default scope.
- Several responses with low ratings included feedback that the user was unable to link to full-text. When these responses were eliminated, the average score was 4.4.
- 8 selected the new default scope as most effective, 4 selected the original default scope, 3 selected the scope with electronic content only, and 2 selected the Articles only scope.