

CDL Tools and Services Selection Criteria

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Definition:

Tools and services extend the usefulness of the CDL's collections by allowing users to locate and access the content in different ways (e.g., a different type of retrieval mechanism or an alerting service), to integrate content from different sources, to manipulate it after retrieving it, to share with colleagues or students, or to customize. They may emulate traditional tools used by various disciplines, or they may break ground by working with digital content in new ways. Tools may be built into a larger service, or they may stand on their own. They also can be facilities that are invisible to the user, but contribute to the smooth functioning and maintenance of the system.

The following criteria will be applied to the evaluation of each tool or service as appropriate with some being more important than others depending on the type of tool or service. However, certain overarching principles guide this process, including the following:

The tool or service must:

- Support the mission of the California Digital Library.
- Address an identified problem or need, or fit one of the broad categories of tools and services.
- To the extent possible and appropriate, promote collaboration and eliminate redundancy of effort or resources among the UC campuses.

Criteria for Identifying, Selecting and Evaluating Tools and Services

1. Purpose

- a. How does it support the mission of the CDL?
- b. What need or problem does it address? How important is the problem? How well does it address the problem?
- c. How does it compare to other similar tools, if any?
- d. Which functions does it perform? Which of the categories of tools and services does it fit, if any? Locate or gain access; manipulate; integrate; share; customize; administrative.
- e. What user group, audience, or subject discipline does it serve? What is the size of that audience? Is it underserved now?
- f. How would they use it in research and teaching?
- g. Does it relate to existing tools and services? If so, how, and how might it be integrated?
- h. What future enhancements are planned? What enhancements are needed to make it useful to the UC community?

2. Organizational

- a. Does it eliminate redundancy and/or encourage sharing technical and human resources?
- b. Who owns, maintains, and makes decisions about it?
- c. Are there features or technical aspects that are customizable at the campus level and/or at the individual user level?
- d. What will be the CDL's role in managing and developing the resource? [Note: we may need to list some qualifications, e.g., CDL is not a granting agency; depends on how we decide to use this list.]
- e. What is the impact if the CDL doesn't incorporate it?
- f. How much user instruction (online documentation, user guides/tutorials, personal instruction) is needed for successful use? What types of user help are provided? Is current user instruction passive or

interactive? What resources are available to develop additional user instruction? What potential exists for user instruction to address information competencies in addition to usage skills?

3. *Technical*

- a. Is it based on standards or can it easily be made to conform to standards? Which ones? Are there emerging standards that might apply?
- b. Is technical documentation available?
- c. Is the source code available?
- d. To what degree is it scaleable? Are there any impediments to scalability? [Note: need examples or a more explicit statement about what this entails.]
- e. Can it/should it be served from central or distributed locations?
- f. Are there any special or minimum hardware/software requirements? [Note: eventually refer to our own standards as developed by the Technical Architecture and Standards Working Group]
- g. What are the installation and maintenance requirements?
- h. Are there impediments to migrating the content or technical infrastructure once installed?
- i. Are there other uses for which it could be easily and appropriately adapted?
- j. If it is a prototype, what would be necessary to move it to a production version?

4. *Costs*

- a. What are the current costs (including but not limited to software and/or content licensing, storage, staffing, expertise, maintenance)?
- b. What are the projected costs of enhancements or upgrading (considering the above cost components)?
- c. What types of expertise and other resources would it take for CDL to build it from scratch?

5. *Evaluation*

- a. Who is using it now?
- b. What assessments of user reactions have been conducted?
- c. What statistics are available, including response time?
- d. What are the known limitations/problems?
- e. What quality measurements or criteria are used?