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Primo [Library Catalog]: Towards a Socially Just Search System

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Primo:
Towards a Socially Just Search System

Molly Gunderson &
Kimberly Willson-St. Clair
Portland State University Library

ELUNA 2019
May 1, 2019
Social Justice

fairness AND inclusion

*Encyclopedia of Education*
Social Justice

A perspective on the development and structure of society and its components that focuses on equality and human rights. Social justice is achieved when all members of society can have human rights recognized and access the benefits of their society so that they can realize their potential.

*A Dictionary of Occupational Science and Occupational Therapy*
Orbis Cascade Alliance – SUMMIT

The Orbis Cascade Alliance enables member libraries to advance institutional missions through collaboration and innovation.

- Founded in 1993
- 39 member libraries
- Resource sharing serves over 275,000 students and faculty
- Circulates 253,000 books annually
- Shared systems, workflows and policies

https://www.orbiscascade.org/
Portland State University (PSU) - A Snapshot

Ranked one of the nation's most innovative universities

- U.S. News & World Report

STUDENTS
27,670

RESIDENT UNDERGRAD TUITION
$9,105

STUDENT-FACULTY RATIO
18:1
<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>Count</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Asian</td>
<td>2,234</td>
<td>8.2%</td>
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<tr>
<td>Black</td>
<td>916</td>
<td>3.4%</td>
</tr>
<tr>
<td>Hispanic/Latino</td>
<td>3,722</td>
<td>13.6%</td>
</tr>
<tr>
<td>International Students</td>
<td>1,800</td>
<td>6.6%</td>
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<tr>
<td>Multiple Race/Ethnic</td>
<td>1,663</td>
<td>6.1%</td>
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<tr>
<td>Native American</td>
<td>298</td>
<td>1.1%</td>
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<tr>
<td>Pacific Islander</td>
<td>161</td>
<td>0.6%</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td><strong>10,794</strong></td>
<td><strong>39.6%</strong></td>
</tr>
<tr>
<td>White</td>
<td>14,807</td>
<td>54.3%</td>
</tr>
<tr>
<td>Declined to Respond</td>
<td>1,684</td>
<td>6.2%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>27,285</strong></td>
<td></td>
</tr>
</tbody>
</table>
PSU Age Trends 2018

http://tableau.services.pdx.edu/Students/Student%20Profile.html

Graduate (top)
Non-Admit (middle)
Undergraduate (bottom)
First Generation Students

neither parent has earned a four year degree

– U.S. Department of Education: Federal TRIO programs, 2010

students who are first in their family to pursue education beyond high school

– National Center for Education Statistics, 2007
Snapshot of First Year Experience Students – Freshmen

First Generation – 52%

Attended high school – 87.3%

Report understanding PSU graduation – 47.5%

Plan to work 1 to 20 hours per week – 58.8%

Financial concern as top concern – 37.9%

Plan to earn a bachelor’s degree – 86.9% (Carpenter 2019)

Bachelor’s highest degree plan to earn – 41.8%
First Generation College Students – “funds of knowledge”

- Feel like outsiders due to the academic jargon
- Less social capital due to less contextual support from family
- Families provide emotional and moral support for success
- Have family responsibilities and working too
- Typically enroll in public institutions
- Typically avoid getting information from librarians
- Use primarily online reference services and resources
- Have college success skills: self-reflection, self-directed learning, and routine study habits

(Ilett 2019)
New Primo Design Group –
January 2016 to August 2016 Launch

Michael Bowman – Assistant University Librarian
Mike Flakus – Lead Web Programmer
Molly Gunderson – Access Services Manager
Allen Hauser – Reference Technician
Tom Larsen – Head of Cataloging and eAccess
Nathan Mealey – Manager of Library Technologies
Kimberly Willson-St. Clair – Reference & Instruction Librarian (Primo Lead)
Universal Design

Creating products, physical spaces, and websites to ensure that all people can use them successfully to the greatest extent possible:

- Developed in 1997 by architects, engineers, and environmental design researchers
- Seven principles – including equitable use, flexibility in use, simple and intuitive use
- WCAG guidelines – alternative text, keyboard functionality, color contrast
Keys to Universal Design Online

Less is more

Clear, jargon-free language

Write link descriptions instead of “Click Here”

Avoid contractions, slang or idioms, or abbreviations

Use words rather than color for conveying information

Readable fonts such as Arial or Helvetica, and at least, 12 point
Accessibility

Web accessibility means that people with disabilities can perceive, understand, navigate, and interact with the web and they can contribute to the web.

Many people are affected by inaccessible content: people who are older, people for whom English is a second language, people who are new to using the web, people using older technologies.

Accessibility – Rationale

Decisions of the Department of Justice (DOJ) and Office of Civil Rights (OCR) have been affirming the legal necessity of a more proactive and inclusive model for over 10 years.

- Demand for flexible and online learning environments
- Allows for more universal browser compatibility
- Better usability via desktop computers, laptops, and mobile devices
The language of flowers: symbols and myths
Marina Heilmeyer
Munich; London: Prestel
2001

Available at Portland State Library Shelves - Basement (GR780.H45 2001)
Actions – Citation Management Starting Points

PRINT BOOK
Women's status in higher education : equity matters
Elizabeth J. Allan, 1964-
San Francisco, Calif. : Jossey-Bass/Wiley
©2011
Available at Portland State Library Shelves -- 3rd floor (LC1567.A44 2011)
Citation Styles Streamlined

PRINT BOOK

The soul of justice: social bonds and racial hubris
Cynthia Willett, 1956-
Ithaca: Cornell University Press
©2001

Send to

APA (6th edition)

Chicago/Turabian
(16th edition)

MLA (8th edition)

Remember to check citations for accuracy before including them in your work.
Open Search

Search is the user’s lifeline for mastering complex websites. The best designs offer a simple search box on the homepage and play down advanced search and scoping.

- users control their own destiny
- search is also users’ escape hatch when they are stuck in navigation
- eCommerce – Users look for a wide, empty field or a magnifying glass icon

(Nielsen 2001)
Open Search Field

Restricting search to a specific area of a website can provide better results, faster. But users overlook, misunderstand, and forget about the search scopes.

- When a user does not realize that his search is limited to a section, the consequences are devastating
- Users expect search to include the entire site
- Scoped search forces people to make a decision too soon

(Sherwin 2015)
## Two Years of Data with Open Search

<table>
<thead>
<tr>
<th>Search Scope Type</th>
<th>Year (date)</th>
<th>Sessions</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSU + Summit</td>
<td>2017</td>
<td>511,127</td>
</tr>
<tr>
<td></td>
<td>2018</td>
<td>518,994</td>
</tr>
<tr>
<td></td>
<td>2019</td>
<td>140,065</td>
</tr>
<tr>
<td>PSU only</td>
<td>2017</td>
<td>76,967</td>
</tr>
<tr>
<td></td>
<td>2018</td>
<td>50,396</td>
</tr>
<tr>
<td></td>
<td>2019</td>
<td>15,614</td>
</tr>
<tr>
<td>PCI, PSU, Summit</td>
<td>2017</td>
<td>1,176,378</td>
</tr>
<tr>
<td></td>
<td>2018</td>
<td>1,104,787</td>
</tr>
<tr>
<td></td>
<td>2019</td>
<td>262,206</td>
</tr>
</tbody>
</table>
Universities & Colleges that Use Open Search

Portland State University Library

University of Washington Libraries

Lewis & Clark College – Watzek Library

Concordia University Libraries
Faceted Navigation

Filters analyze a set of objects and eliminate any that do not match the selected criteria.

Faceted navigation includes filters for many different attributes (or facets) of the objects in a set.

(Whitenton 2014)
Filters – Above the Fold

Availability (Top Level)
Course Number and Name
Course Instructor
Resource Type
Date
Filters – Below the Fold

Author
Topic
Composer
Language
Journal Title
Classification LCC
10 Facets (Filters) – January 2017–April 2019

Top Level
Resource Type
Date Slider
Facets – An October Comparison

<table>
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<tr>
<th>Facets</th>
<th>October 2017</th>
<th>October 2018</th>
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</thead>
<tbody>
<tr>
<td>Top Level (Availability)</td>
<td>2,991</td>
<td>15,350</td>
</tr>
<tr>
<td>Resource Type</td>
<td>2,464</td>
<td>13,996</td>
</tr>
<tr>
<td>Date Slider</td>
<td>2,925</td>
<td>5,336</td>
</tr>
</tbody>
</table>
Top Level (Availability) – January 2017–April 2019
Availability (Top Level) Facets – A November Comparison

<table>
<thead>
<tr>
<th>Facets</th>
<th>November 2017</th>
<th>November 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>On Library Shelves</td>
<td>857</td>
<td>2,975</td>
</tr>
<tr>
<td>Peer Reviewed Journals</td>
<td>1,896</td>
<td>10,955</td>
</tr>
<tr>
<td>PSU Online Resources</td>
<td>981</td>
<td>3,987</td>
</tr>
<tr>
<td>Open Access</td>
<td></td>
<td>598</td>
</tr>
</tbody>
</table>
Sticky Facets – Game Changer
Sticky Facets – Searching as Strategic Exploration
Primo Next Steps

- Usability – Spring 2020
- Add chat box
- Continual striving for accessibility
Endnote

Many thanks to Michael Bowman, assistant university librarian, as well as Allen Hauser, reference technician, and Richard Mikulski, government information librarian, for helping us navigate and comprehend Primo Analytics at the Portland State University Library.
Accessibility Resources

508 Compliance Law:  https://www.section508.gov/content/learn/laws-and-policies

WCAG 2.0 AA Compliance:  https://www.w3.org/TR/WCAG20/

Portland State University Accessibility:  https://www.pdx.edu/accessibility/
Bibliography


Bibliography


Bibliography


Thank You & Questions?

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