Diversity, Equity and Inclusion in Search Advisory Group Update

Allen Jones & Judith Fraenkel

Ex Libris Users of North America

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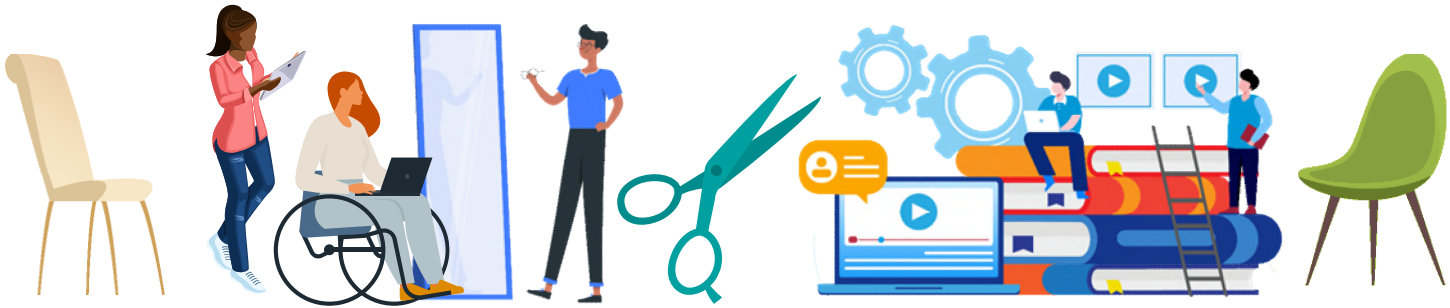
The great opportunity

Our tools such as chairs and scissors, and technological products such as search engines and social platforms, are in essence the same thing. Beyond their main purpose in assisting people in different areas and tasks they are mirrors that reflect our societal and individual values, even those that we are not consciously aware of, thus the opportunity to discover, address and fix has never been greater.



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How is DEI related to Ex Libris and its products?

We as a company have an impact on many people and are committed to help create a better, more compassionate future.

One of our top concerns is to ensure that our systems are built for and serve everyone equally. We are cognizant of the fact that unintentional/unconscious bias can be present in any product, system, algorithm, including ours.

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Our approach and focus areas

TECHNOLOGY

EMPLOYEE DIVERSITY

COMMUNITY COLLABORATION

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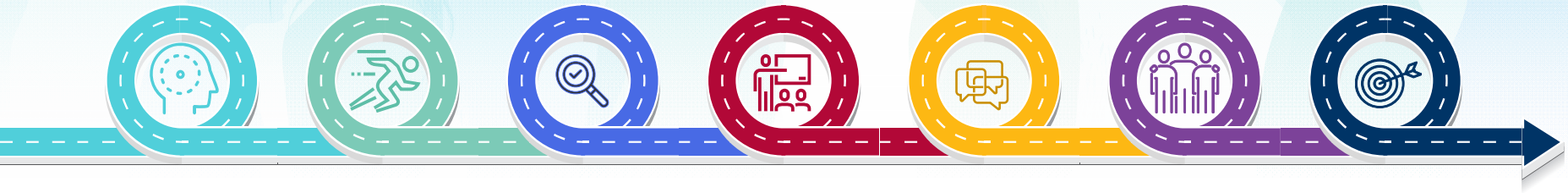
DEI: Our path

Take action!

Educate

Diverse views:
The community
External consultants



Awareness

Explore

Report

Vision, values and goals

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Diversity in design

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An ethical approach to products

The application of ethical thinking to the practical concerns of technology should be part of the cycle of products from design, coding, quality assurance, etc..

PERSONALIZE

Innovate library experiences

OPTIMIZE

Continue to optimize operations

Expand reach and connect communities & institutions

CONNECT

Generate insights through a global data network

ANALYZE

Introduce new standards for engagement

ENGAGE

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Shared DEI work

Somewhere around 2020 we started a discussion about DEI and what it meant for the library world

Two very significant steps were initiated during this initial period: the creation of two groups

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DEI and Discovery

- We discussed
- We released solutions
- We met with people
- We learned from experiences
- We discussed (again)
- Released additional solutions

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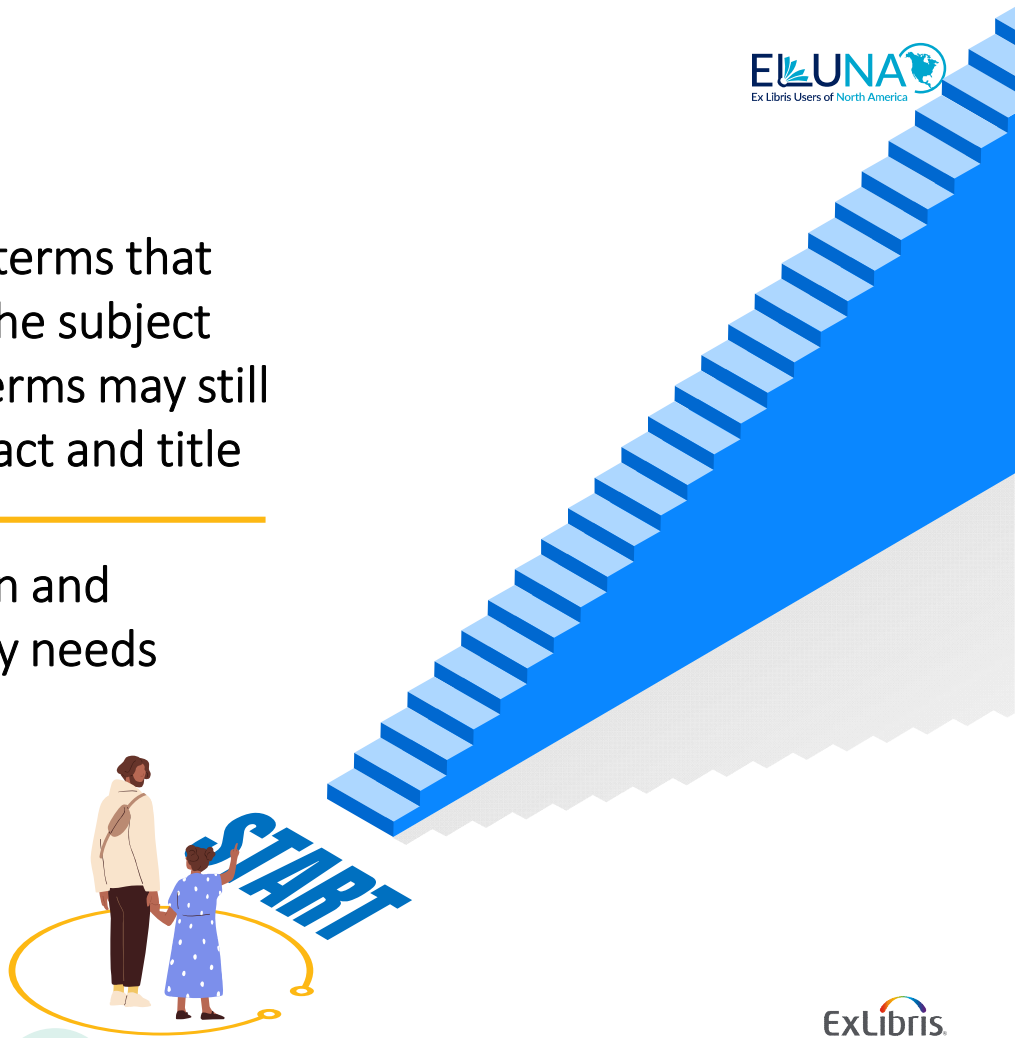
A first DEI step

Our approach for extremely offensive terms that we found, was to remove them from the subject headings from the index though the terms may still appear and be searchable in the abstract and title

This approach initiated a new direction and more understanding of our community needs



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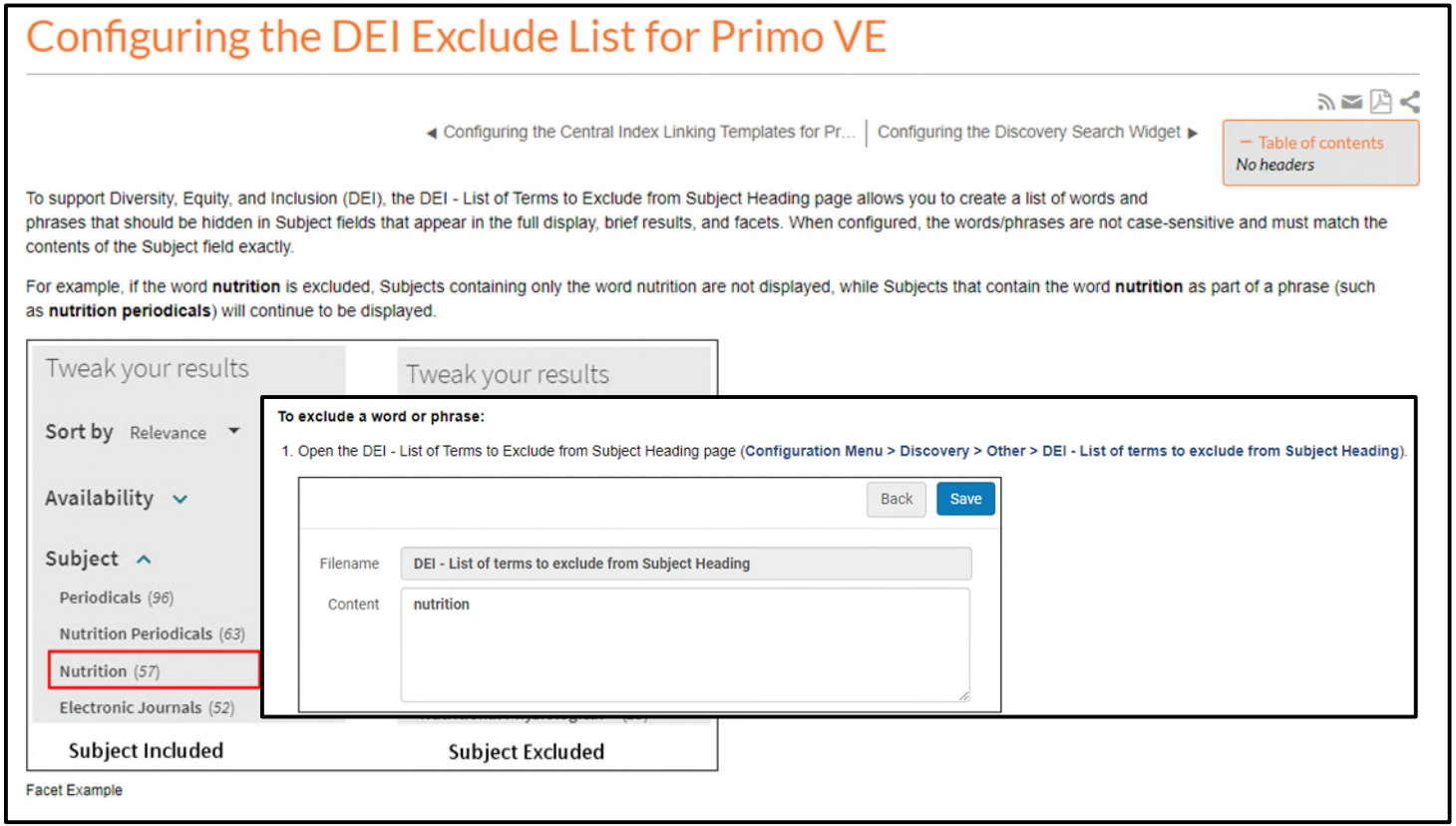
Dialogue, a space to think, a new solution



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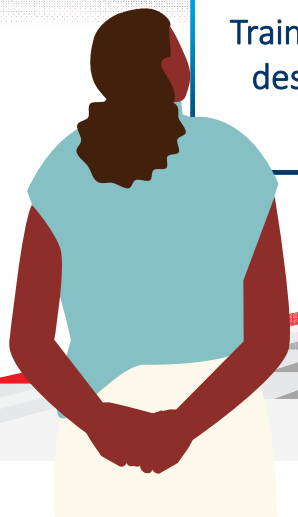
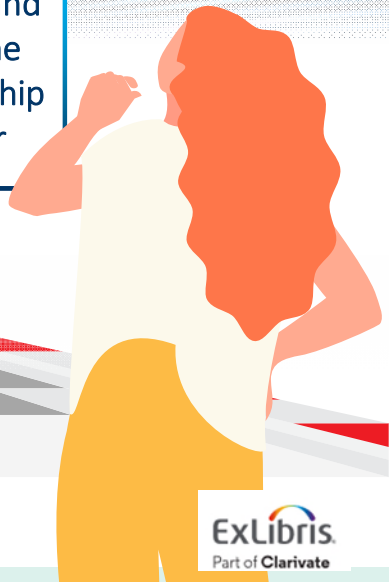
Recent DEI activities

Continuous work with the DEI Advisory Board	EXL Inclusive language Guidelines	Product DEI user stories
Training on diversity by design to EXL teams	A talk with Orly Lobel	Building our identity and positioning within the group and in relationship to the library vector





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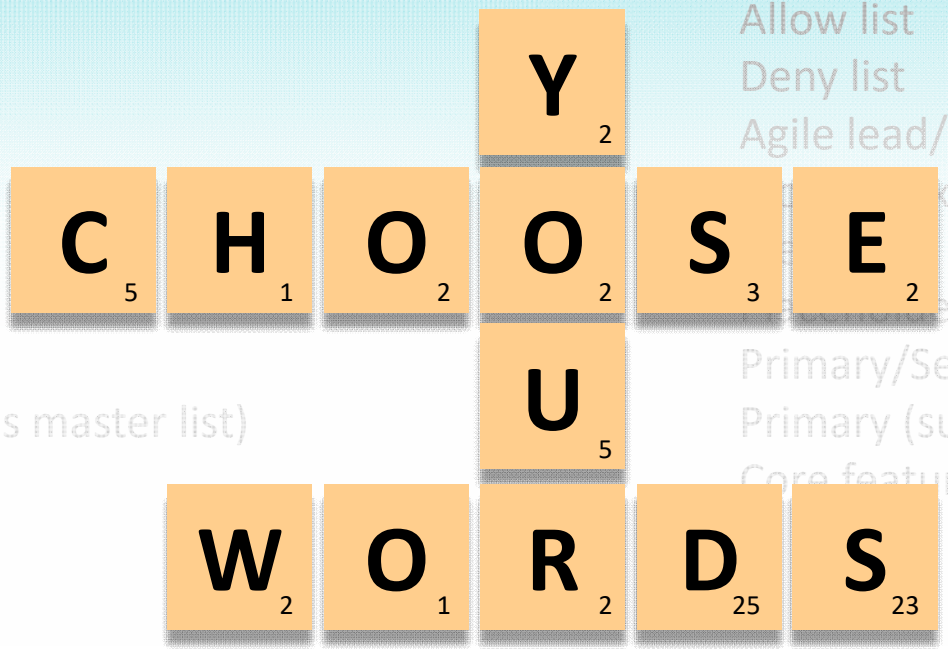
Inclusive language guidelines

Term not to use	Term to use
Whitelist	Allow list
Blacklist	Deny list
Scrum master	Agile lead/Scrum Leader
Blackbox	
Whitebox	
Dummy value	
Master/Slave	Primary/Secondary or Parent/Child
Master (such as master list)	Primary (such as primary list)
Native feature	



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Inclusive language guidelines

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Whitelist	Allow list
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Scrum master	Agile lead/Scrum Leader
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Whitebox	Clear box
Dummy value	Placeholder
Master/Slave	Primary/Secondary or Parent/Child
Master (such as master list)	Primary (such as primary list)
Native feature	Core feature
Housekeeping	Cleanup, maintenance
Master branch	Main branch
Sanity check	Confidence check
Kill (a process)	Stop a process

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The relevance of representation

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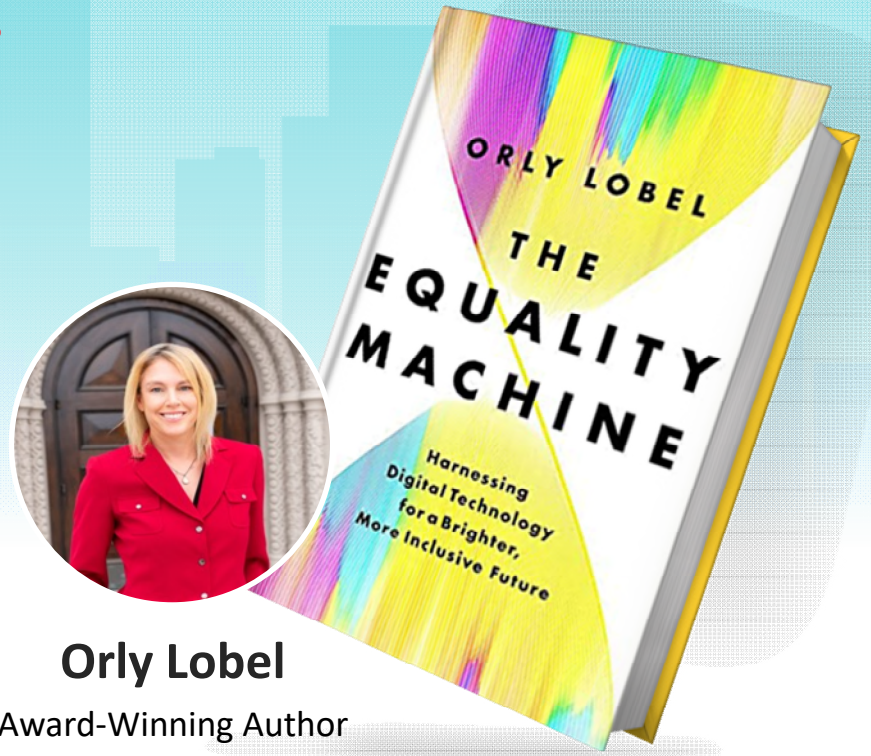
Let’s not miss the opportunities we have

Ex Libris & Innovative educational programs

Diversity and inclusion by design – How technology can ensure a better world



Orly Lobel

Award-Winning Author

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Our journey continues

Collaboration with the community

Dialogue as our main tool

Looking for new ways of approaching DEI

Working on new areas beyond discovery

Enlarging our teams to cover more territory

Include other voices, more content

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Visibility and commitment

https://www.exlibrisgroup.com/diversity-inclusion-equity/

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The role of the library in the DEI journey: Creating, promoting, and measuring inclusive practices

Sponsored by ProQuest, Part of Clarivate

Scheduled for Wednesday, May 24 at 11:00am

Posted in Collection Development and Management, Diversity, Equity, Inclusion, Accessibility (DEIA)

What role does the library play in adopting and furthering DEI initiatives?

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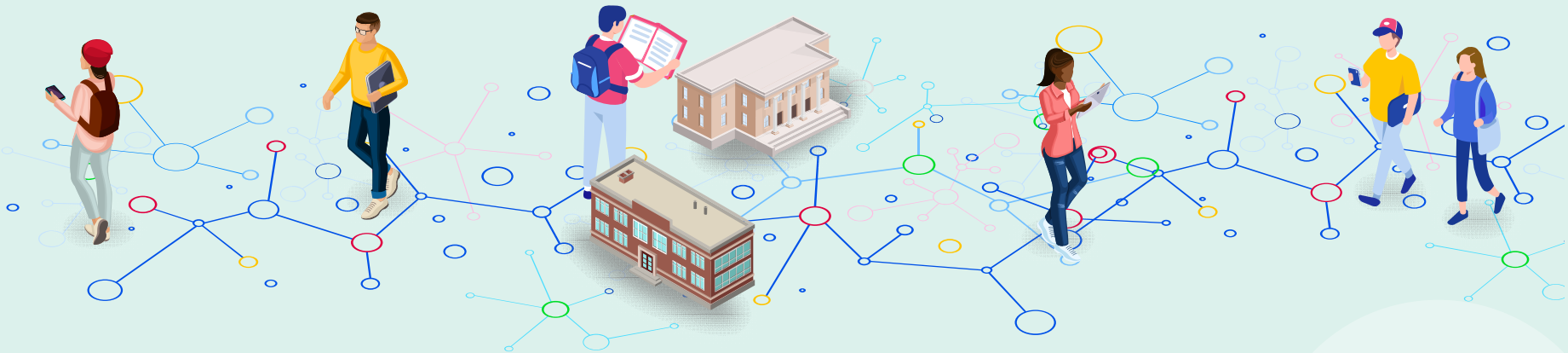

DEI and the role of the community

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Members

- Christine Stohn, Ex Libris
- Judith Fraenkel, Ex Libris
- Hollie White, Curtin University
- Jill Baron, Dartmouth College
- Julene Jones, University of Kentucky
- Angela Boyd, San Diego Community College
- Cindy Greenspun, Yale University
- Julene Jones, University of Kentucky
- Michelle Bass, Harvard Library
- Glenn Tozier, Monterey Peninsula College
- Vicky Jay Leung, University of Windsor
- Judy Drescher, Molloy College
- Malaika Grant, University of Minnesota
- Xiaoli Li, University of California, Davis
- Drew Parker, Brandeis University

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DEI In Search - Accomplishments

- 12 new features introduced into product enhancement voting
- User Story – what does a “diverse” result set/discovery experience look like?
- User Story – what types of tools are needed for collection assessment? Purchasing?
- User Story – how to report offensive language? To Whom?
- User Story – how do we tell the critical cataloging/metadata story?

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DEI In Search

DEI Exclusion List Expansion

- 8294 – Network Zone Exclude List
- 8295 – Allow substrings for text matching, not just exact text matches
- 8296 – Add DEI term Substitution
- 8297 – Contextualizing Problematic Terms Tool

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DEI In Search

8297: Add ability to contextualize offensive terms in UI with a Problematic Terms Tool

User Story: As a user in Primo/Primo VE, when I encounter a term that could be potentially offensive, I wish to have further explanation about the context and use of the term. This tool should be managed in either the institution zone or the network zone.

This would follow in a similar vein as the table available for the exclude list, but it would include the possibility of the following fields:

1. Value of term
2. Link to explanatory source
3. Short explanation text blob
4. Image URL
5. Date updated

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Other DEI Related Functionality

8298 – Add an Offensive Term Reporting Tool to support reporting issues in UI

8299 – Add a DEI icon and information popup

8301 – Match CDI keywords against LCSH or widely used thesauri

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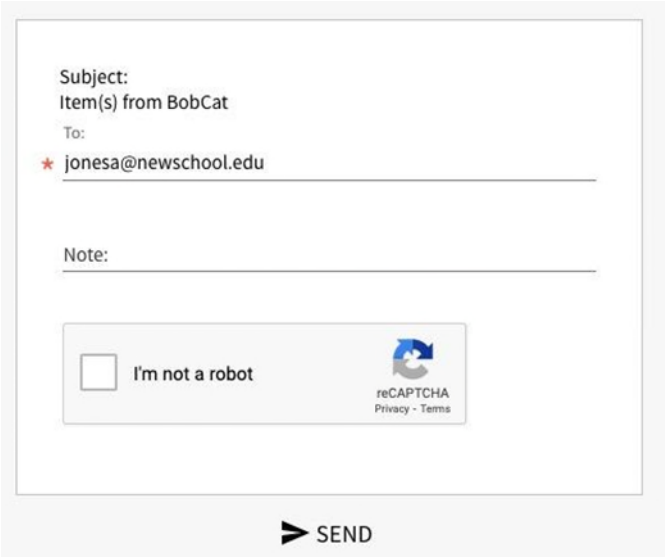
8298: Offensive Term Reporting Tool

User Story: Similar to ‘report a problem’, this feature would enable patrons to submit feedback about potentially offensive content within an institution's holdings and/or article data. Ideally, this feature would follow the same architecture of the ‘Email Result’ function. Again, this should be a feature that can be pushed from the network zone to different institutions or the institution should be able to override/customize this function.



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8299: Add a DEI icon and information popup

Add to each record an icon (question mark or other symbol) to hover over to learn more about metadata in details pane

- icon hover brings up a box with first-level info and ability to link to second-level info
- First level: encouragement to report something if they find it offensive.
- Second Level: Full Statement about critical catalogi
  Acknowledge that portions of our catalog over whic
- Example statements
  - Statement on Inclusive Description
  - Harmful Language in the Library Catalog
  - Harmful Language (UMKC)

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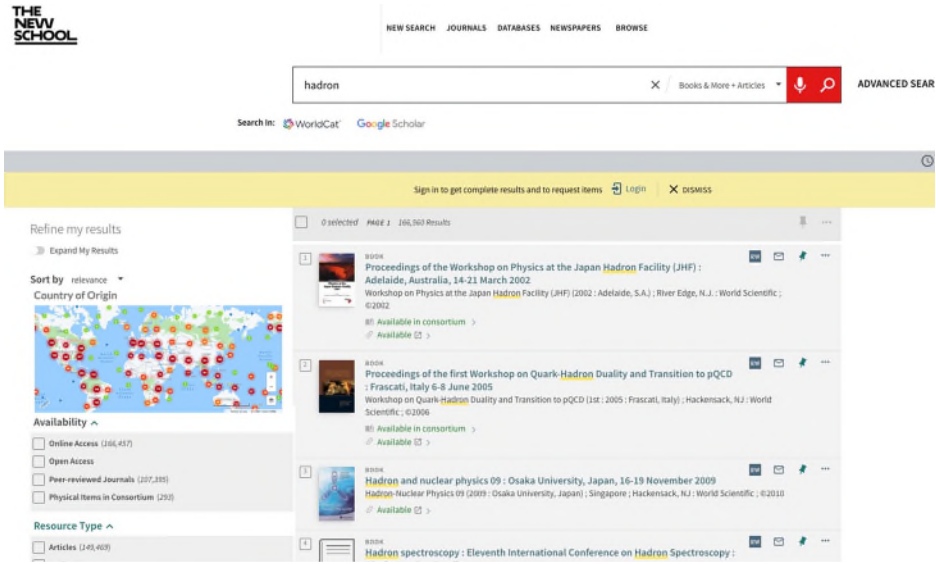
8300: Country of Origin Widget

Allow to facet / limit to articles coming authors of specific regions of the world

Would be able to expand and contract based on zoom of widget

Meant to highlight where scholarship is occurring on specific query strings/topics

Also meant to expose content that might be from an under-represented country



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CDI Controlled Vocabulary Enrichment

Split controlled vocabulary from keywords based on term matching within controlled thesauri

Matches stay in subject, non-matched terms get moved to “keywords”

Meant to address the perception that all metadata comes from librarians, rather than other sources such as publishers, authors, etc, who may use problematic access points in their metadata.

Would not remove problematic metadata from the work/item, would only address subject terms assigned to the item

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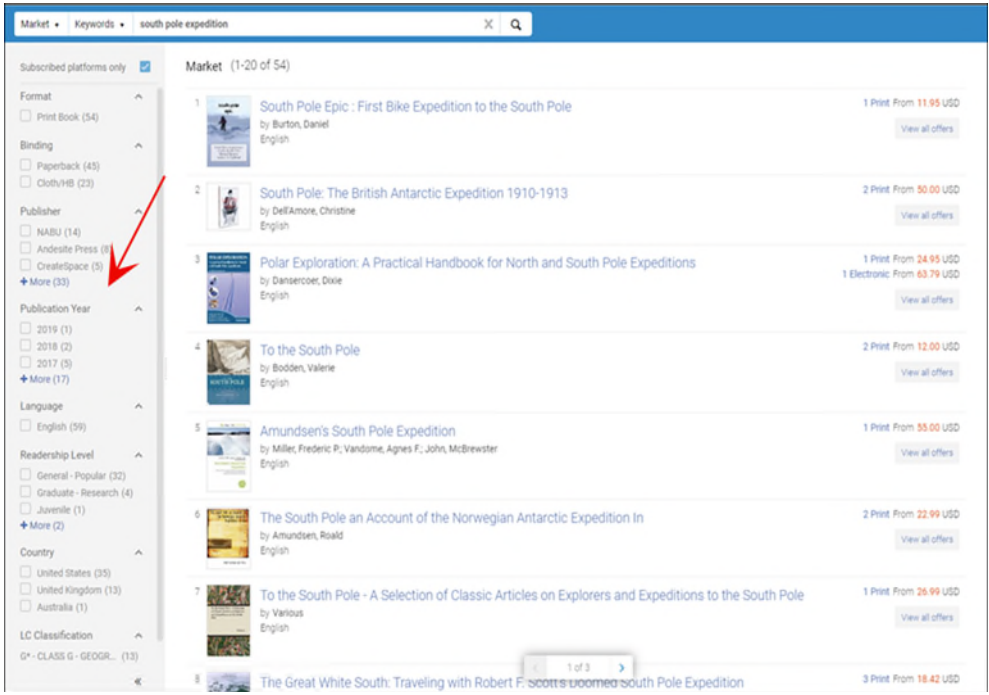
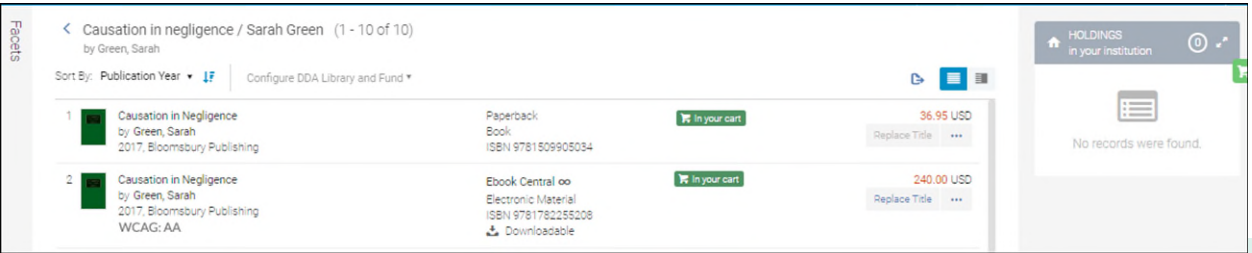
Measures of Universal Access

User story: As a selector, I wish to know the accessibility rating of the platform I am selecting as well as whether the ebook platform supports text-to-speech functionality.

Accessibility ratings should be made available from VPATs on vendor sites. Icons should also be present about the accessibility rating (2.0, 2.1 / A,AA, AAA, AAA+) of the platform that the book resides in.





Set Funding Goals for Purchase by Region

User Story: As a user, I want to know if my institution sets a quota for under-represented scholarship / country of origin that I can measure progress on that goal throughout the fiscal year. I should be able to “mark” titles contributing to that goal and produce title lists/reports on the goals themselves.

For example, suppose I set a goal to order 10% (or 7,000 USD) of a regional studies fund to be about the Caribbean Islands. In that case, Rialto should measure the progress of that goal as I am making selections throughout the year. Goals can be for a particular selector or shared across a group of selectors. Goals could also be based on particular language assignments, subject areas, or ebook functionality (such as books with text-to-speech).

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Bias Discussions – Summer/Fall 2023

- Relevancy Ranking
  - Under-represented scholarship (The Global South)
  - Early-career researchers
  - Non-English scholarship
- Perform study similar to Jordan and Tsai on Primo Local, Primo CDI and Primo CDI+Local

Jordan, K. & Tsai, S.P. (2022). 'Sort by relevance': Exploring assumptions about algorithm-mediated academic literature searches. Society for Research into Higher Education (SRHE) Research Report.

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Enhancements Authoring – Q4 2023

- What types of variables/analytics are used when people call a collection “diverse” and “inclusive”? ACRL DEI Scorecard? Other metrics?
- Is this something the user community wants (ACRL Study, 2023)?
- How does representation influence AI training models?
- How is bias addressed within large LLMs?

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Thank you!

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