



# Diversity, Equity and Inclusion in Search Advisory Group Update

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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.



# 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.



# Our approach and focus areas



# DEI: Our path



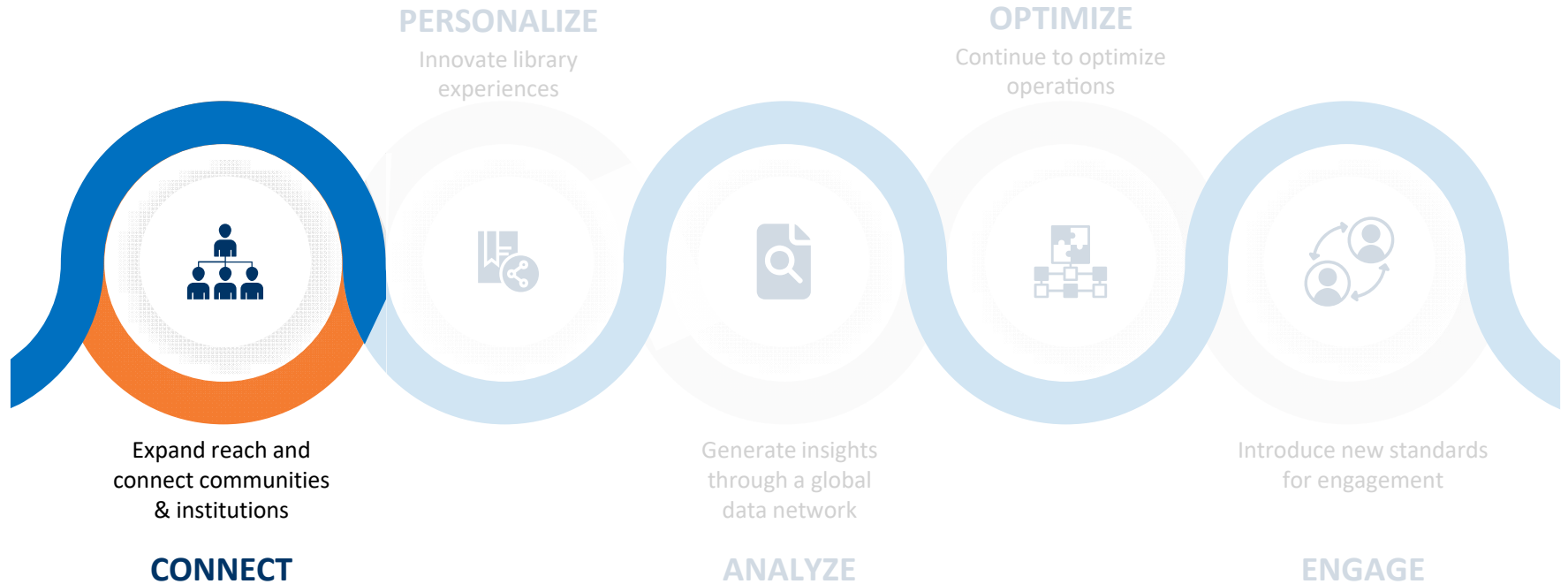


# Diversity in design



# 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..



# 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





# DEI and Discovery

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



# 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

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



# Dialogue, a space to think, a new solution

## Configuring the DEI Exclude List for Primo VE

◀ Configuring the Central Index Linking Templates for Pr... | Configuring the Discovery Search Widget ▶

— Table of contents  
No headers

To support Diversity, Equity, and Inclusion (DEI), the DEI - List of Terms to Exclude from Subject Heading page allows you to create a list of words and phrases that should be hidden in Subject fields that appear in the full display, brief results, and facets. When configured, the words/phrases are not case-sensitive and must match the contents of the Subject field exactly.

For example, if the word **nutrition** is excluded, Subjects containing only the word nutrition are not displayed, while Subjects that contain the word **nutrition** as part of a phrase (such as **nutrition periodicals**) will continue to be displayed.

The screenshot shows the Primo VE interface with a sidebar on the left containing facets: Periodicals (96), Nutrition Periodicals (63), **Nutrition (57)** (highlighted with a red box), and Electronic Journals (52). Below the facets are two buttons: 'Subject Included' and 'Subject Excluded'. A modal window titled 'To exclude a word or phrase:' is open, containing the following text and form:

1. Open the DEI - List of Terms to Exclude from Subject Heading page (Configuration Menu > Discovery > Other > DEI - List of terms to exclude from Subject Heading).

Filename: DEI - List of terms to exclude from Subject Heading

Content: nutrition

Buttons: Back, Save

Facet Example

# 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

# Inclusive language guidelines

## Term not to use

Whitelist  
Blacklist  
Scrum master  
Blackbox  
Whitebox  
Dummy value  
Master/Slave  
Master (such as master list)  
Native feature

## Term to use

Allow list  
Deny list  
Agile lead/Scrum Leader  
Primary/Secondary or Parent/Child  
Primary (such as primary list)  
Core feature





# Inclusive language guidelines

Terma not to use	Terms to use
Whitelist	Allow list
Blacklist	Deny list
Scrum master	Agile lead/Scrum Leader
Blackbox	Closed box
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



# The relevance of representation

Vice President of Retail  
1d • 🌐

How this made me smile! Why representation matters. #encanto #disney  
#diversityandinclusion



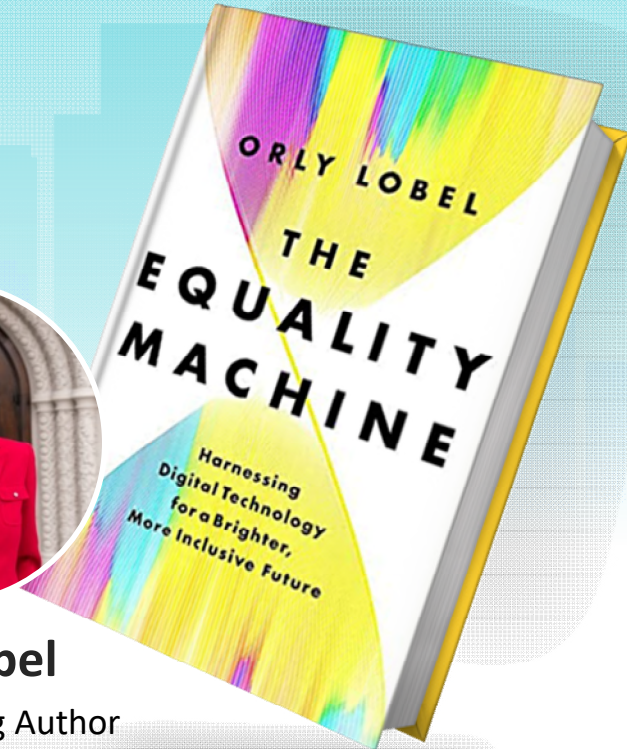
# Let's not miss the opportunities we have

Ex Libris & Innovative educational programs

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



**Orly Lobel**  
Award-Winning Author



# Our journey continues

Collaboration with  
the community

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Dialogue as our  
main tool

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Looking for new ways  
of approaching DEI



Working on new  
areas beyond  
discovery

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Enlarging our teams to  
cover more territory

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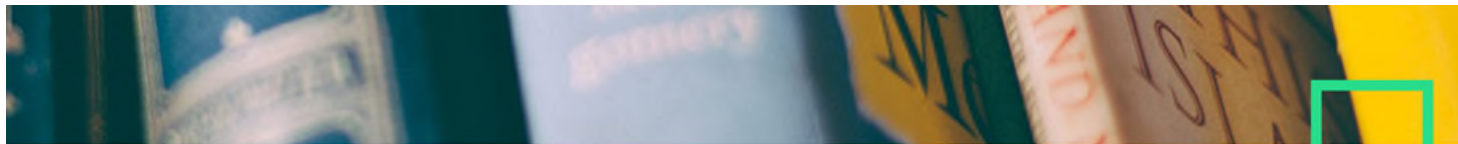
Include other voices,  
more content



## Visibility and commitment

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





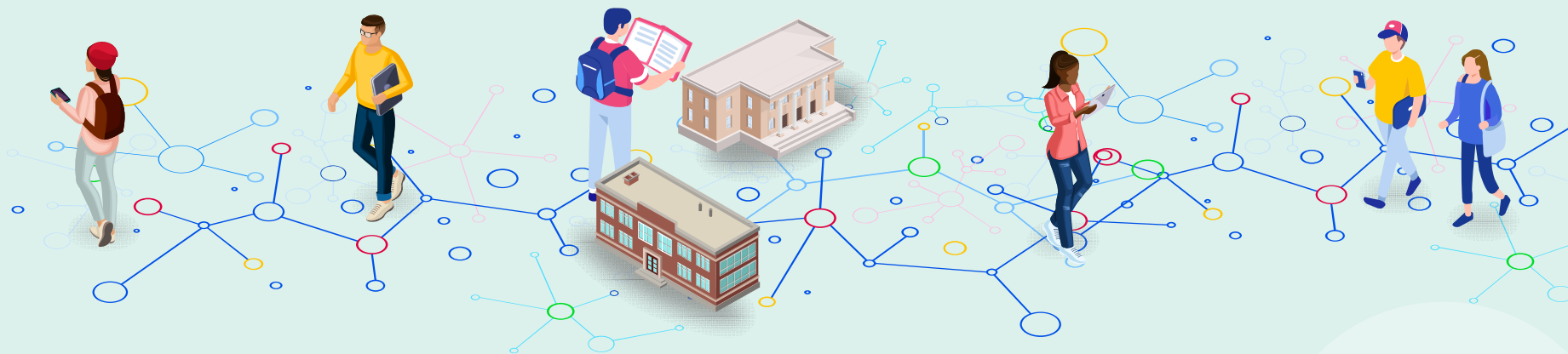
## The role of the library in the DEI journey: Creating, promoting, and measuring inclusive practices

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?**



## DEI and the role of the community



# 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

# 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?

# 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

## 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



# 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

# 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.

Subject:  
Item(s) from BobCat

To:  
★ jonesa@newschool.edu

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Note:  
\_\_\_\_\_

I'm not a robot   
reCAPTCHA  
Privacy - Terms

➤ SEND



# 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 which
- Example statements
  - [Statement on Inclusive Description](#)
  - [Harmful Language in the Library Catalog](#)
  - [Harmful Language \(UMKC\)](#)

The screenshot shows a library catalog record for the book "The love songs of W.E.B. Du Bois". A yellow star icon is placed over the "Details" section header. A speech bubble containing the text "Learn more!" points to the star. The record details include:

Details	
Title	The love songs of W.E.B. Du Bois : a novel
Creator	Jeffers, Honorée Fanonne, 1967- author. >
Subject	African American women > African American families -- Georgia > African American families -- Georgia -- History > Identity (Psychology) > African Americans -- Race identity > Cloth or Hardcover > Fiction - General > Literary > African American & Black - Women > FICTION / African American & Black / Women > FICTION / Cultural Heritage > FICTION / Literary > Cultural property > Historical fiction > Novels >
Genre	Fiction.
Description	The great scholar, <b>W. E. B. Du Bois</b> , once wrote about what he called "Double Consciousness," a sensitivity that every African American possesses in order to survive. From an early age, <b>Ailey</b> fights a battle for belonging that's made all the more difficult by a hovering trauma. To come to terms with her own identity, <b>Ailey</b> embarks on a journey through her family's past. In doing so <b>Ailey</b> must learn to embrace her full heritage, a legacy of oppression and resistance, bondage and independence, cruelty and resilience that is the story - and the song - of America itself.
Publisher	New York, NY : Harper, an imprint of HarperCollinsPublishers
Creation Date	2021
Copyright Notice Date	©2021
Edition	First edition.

*Primo Customization*

# 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

The screenshot displays a search interface for 'hadron'. At the top, there's a search bar with 'hadron' entered and a search button. Below the search bar, there are options for 'WorldCat' and 'Google Scholar'. A yellow banner indicates 'Sign in to get complete results and to request items'. The main content area is divided into two columns. The left column, titled 'Refine my results', includes a 'Country of Origin' widget showing a world map with red dots indicating the locations of search results. Below the map are filters for 'Availability' (Online Access, Open Access, Peer-reviewed Journals, Physical Items in Consortium) and 'Resource Type' (Articles). The right column shows search results for 'hadron', including titles like 'Proceedings of the Workshop on Physics at the Japan Hadron Facility (JHF): Adelaide, Australia, 14-21 March 2002' and 'Proceedings of the first Workshop on Quark-Hadron Duality and Transition to pQCD: Frascati, Italy 6-8 June 2005'. Each result includes a thumbnail, title, author, and availability status.

# 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

# 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.

The screenshot shows a search results page for 'south pole expedition'. On the left, there is a sidebar with filters for Format, Binding, Publisher, Publication Year, Language, Readership Level, Country, and LC Classification. A red arrow points to the 'More' link under the 'Publisher' filter. The main area displays a list of books with their titles, authors, and prices. The books listed are:

- 1 South Pole Epic : First Bike Expedition to the South Pole by Burton, Daniel English 1 Print From 11.95 USD
- 2 South Pole: The British Antarctic Expedition 1910-1913 by DeLAmore, Christine English 2 Print From 50.00 USD
- 3 Polar Exploration: A Practical Handbook for North and South Pole Expeditions by Dansercoer, Dixie English 1 Print From 24.95 USD 1 Electronic From 63.79 USD
- 4 To the South Pole by Bodden, Valerie English 2 Print From 12.00 USD
- 5 Amundsen's South Pole Expedition by Miller, Frederic P., Vandome, Agnes F., John, McBrewster English 1 Print From 55.00 USD
- 6 The South Pole an Account of the Norwegian Antarctic Expedition In by Amundsen, Roald English 2 Print From 22.99 USD
- 7 To the South Pole - A Selection of Classic Articles on Explorers and Expeditions to the South Pole by Various English 1 Print From 26.99 USD
- 8 The Great White South: Traveling with Robert F. Scott's doomed South Pole Expedition 3 Print From 18.42 USD

The screenshot shows a search results page for 'Causation in negligence / Sarah Green'. The results are sorted by 'Publication Year'. Two results are shown:

- 1 Causation in Negligence by Green, Sarah 2017, Bloomsbury Publishing Paperback Book ISBN 9781509905034 36.95 USD
- 2 Causation in Negligence by Green, Sarah 2017, Bloomsbury Publishing WCAAG: AA Ebook Central Electronic Material ISBN 9781782255208 240.00 USD

# 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).

# 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.

# 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?



Thank you!

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