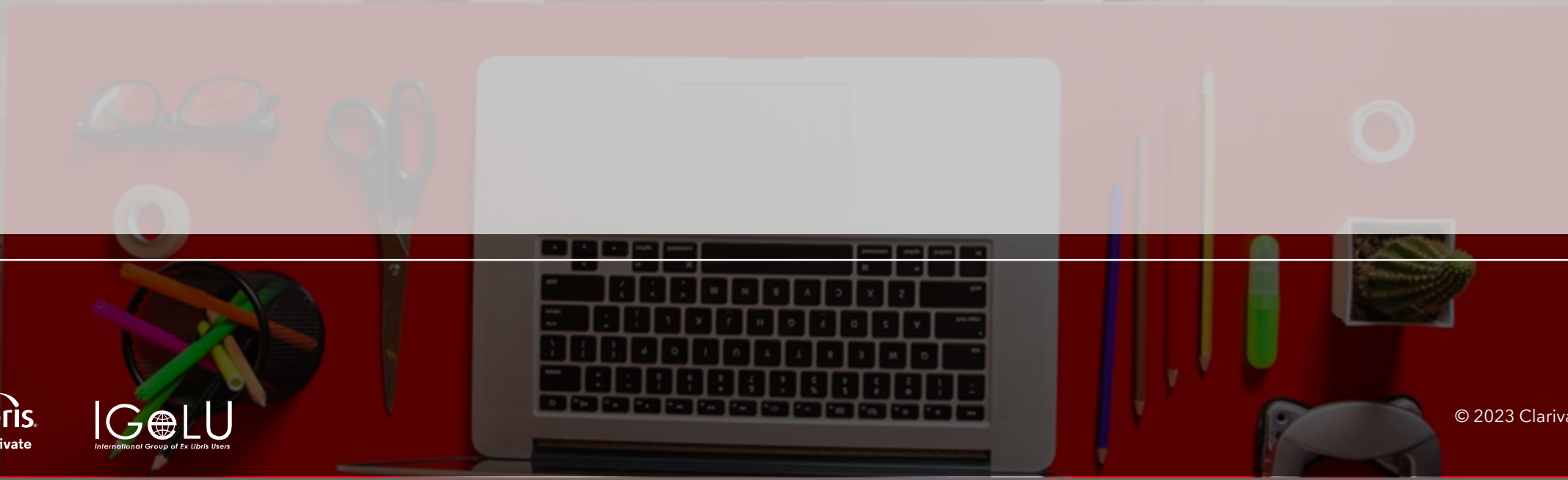
Ex Libris
Part of Clarivate
IGeLU
International Group of Ex Libris Users
Navigating Bias in Technology:
Promoting Diversity, Equity, and Inclusion
for Inclusive Ex Libris Products
Allen Jones and Judith Fraenkel

The Great Opportunity

Tools and technological products are mirrors that reflect our values. Can we use a chair or discovery platforms to discover, address, and fix unconscious biases?



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How is DEI Related to Ex Libris and its Products?

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

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

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Our Approach and Focus Areas

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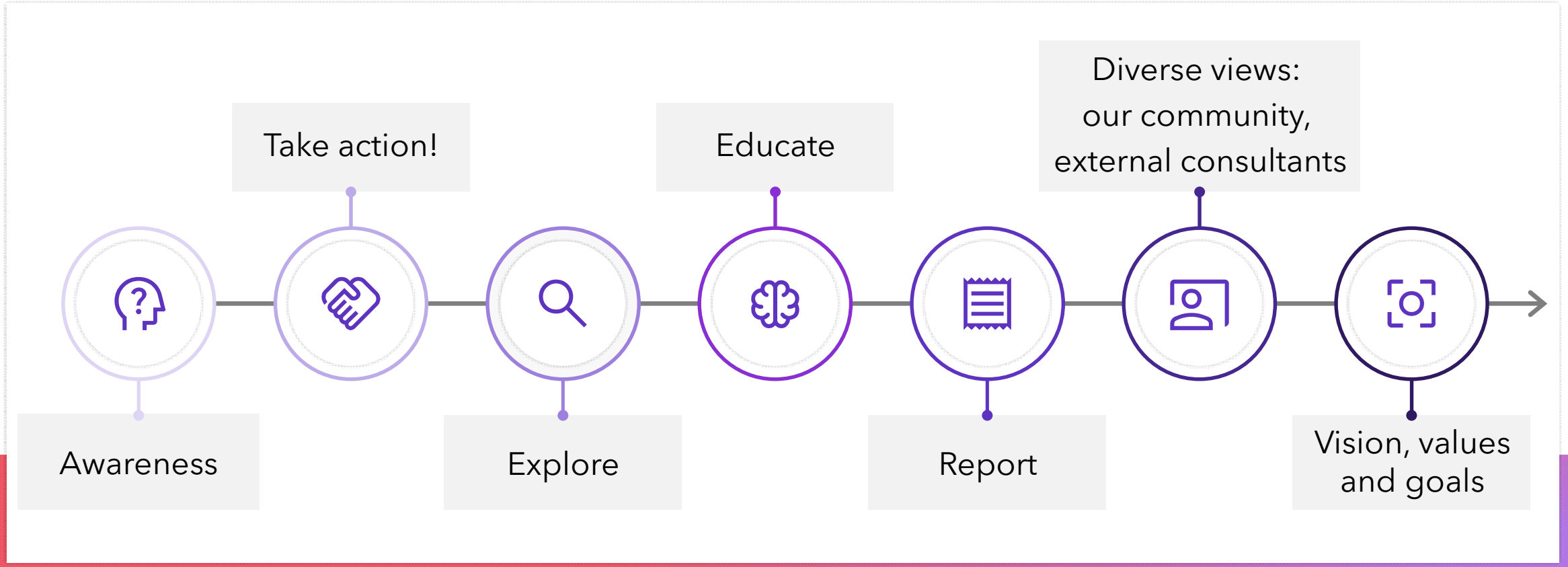
DEI: Our Path



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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..

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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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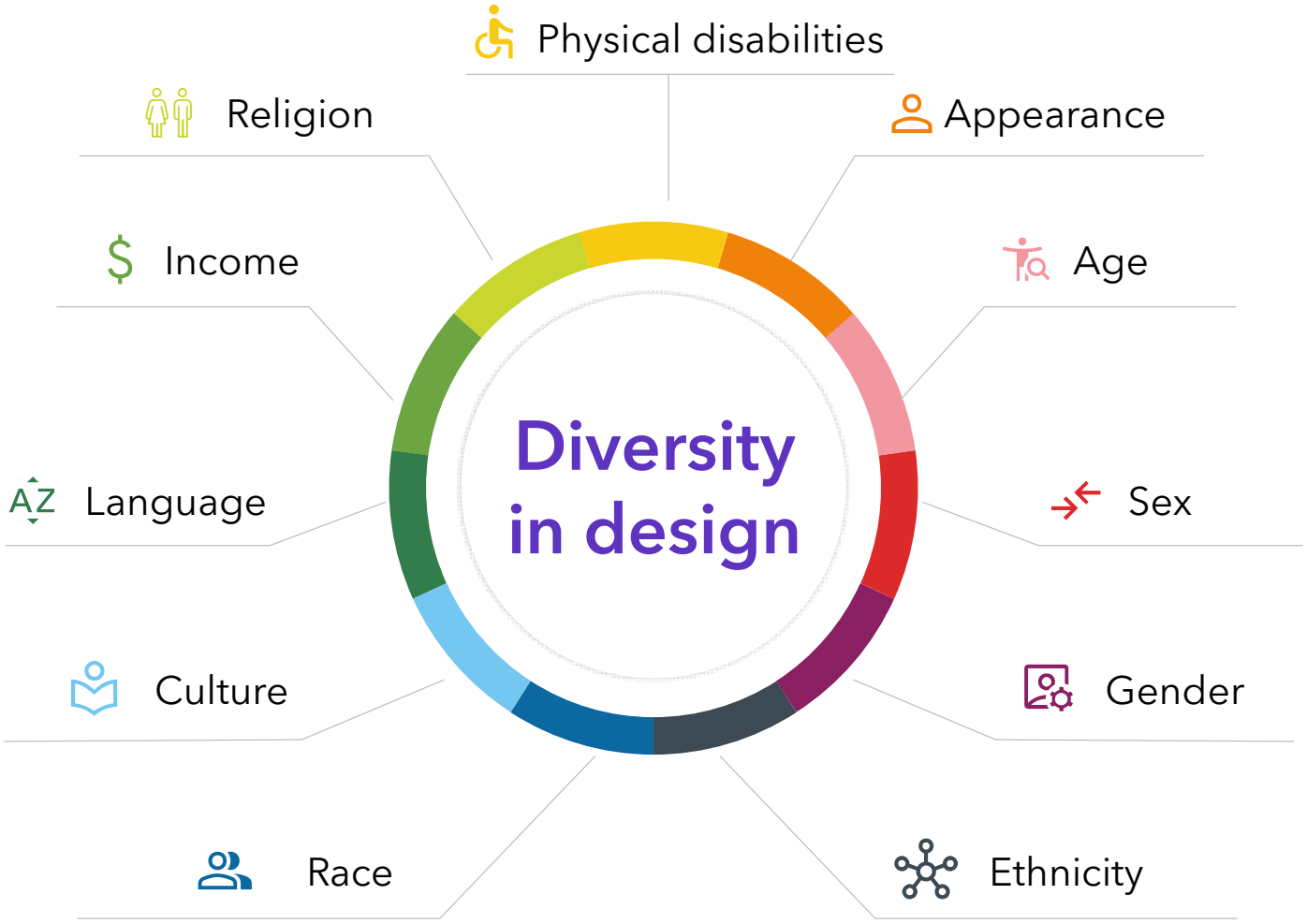
Diversity in Design



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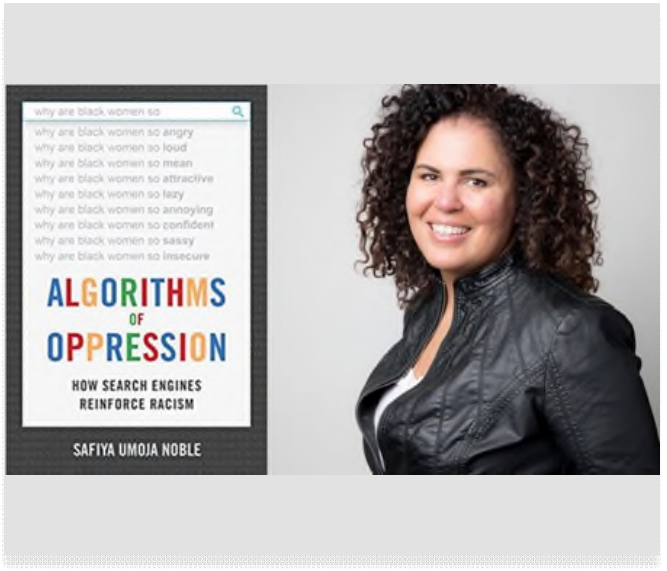
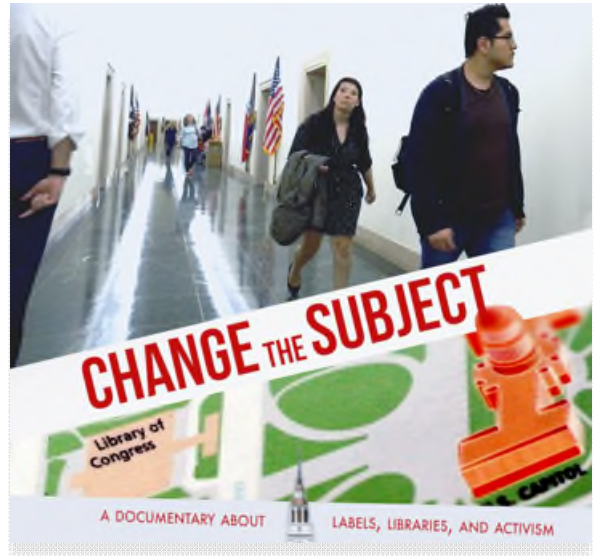
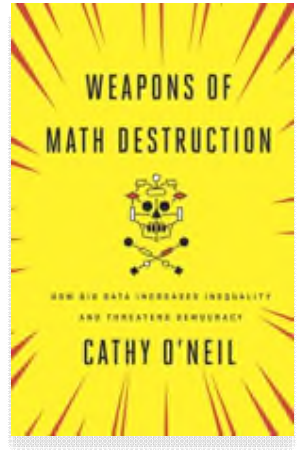
DEI and Discovery

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







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Recent DEI Activities

Continuous work with the DEI Advisory Board

Ex Libris inclusive language guidelines

Product DEI user stories

Training on diversity by design to Ex Libris teams

A talk with Orly Lobel

Building our identity and positioning within the group and in relation to the library vector

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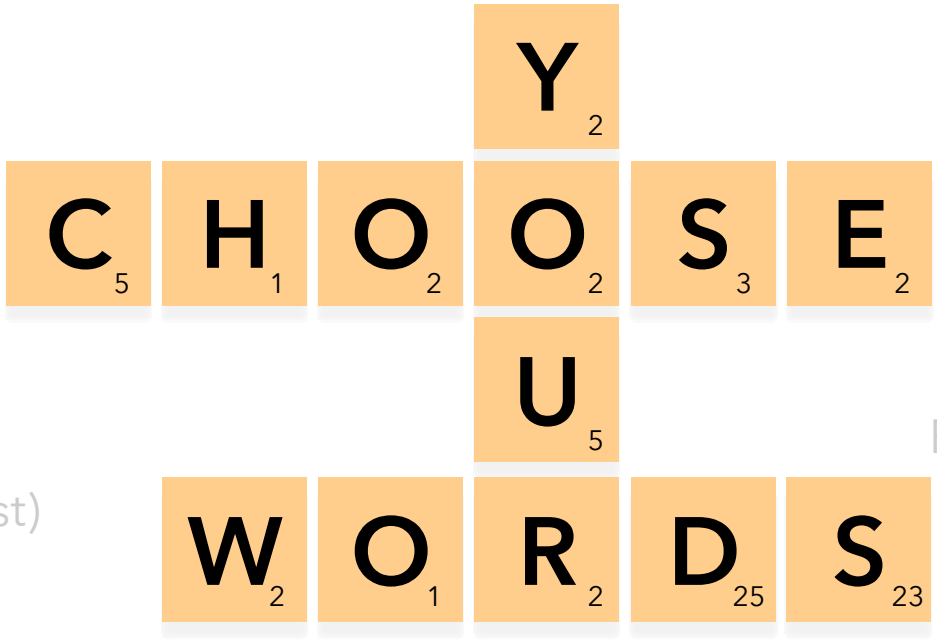
Inclusive Language Guidelines

TERM NOT TO USE	TERM TO USE
Whitelist	Allow list
Blacklist	Deny list
Scrum master	Agile lead/Scrum Leader
Blackbox	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



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Inclusive Language Guidelines

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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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People learn from seeing or not seeing themselves that maybe they don't belong.

– *Heather Hiles*

Chair of Black Girls Code

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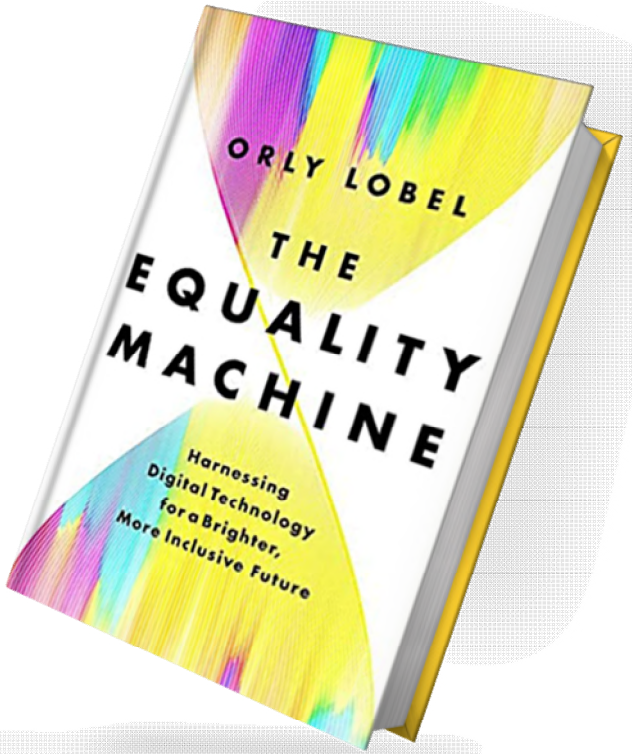
Let's Not Miss the Opportunities We Have

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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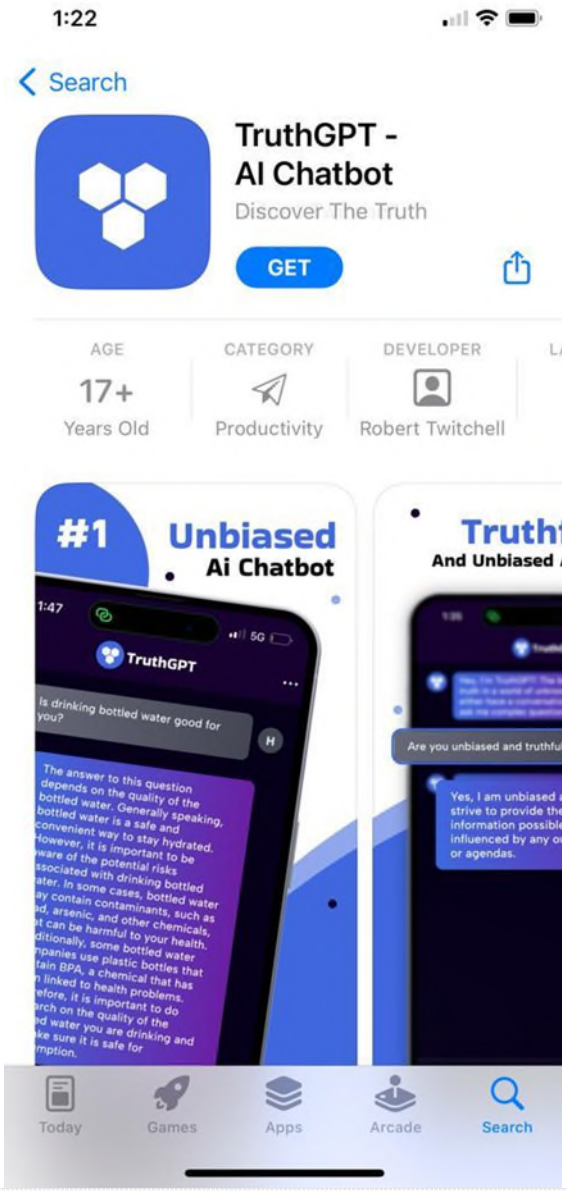
What About AI?



Is AI Bad for Libraries?

https://blog.pressreader.com/libraries-institutions/academic-libraries-use-artificial-intelligence-to-improve-their-services

The librarian as natural leader

The potential applications of AI when it comes to library ideas are seemingly limitless, and librarians who embrace this technology and its practical implications on their field will be well-positioned to drive innovation.

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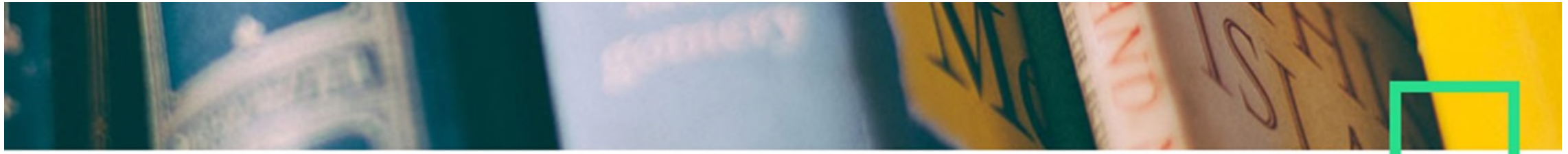
Sharing Stories



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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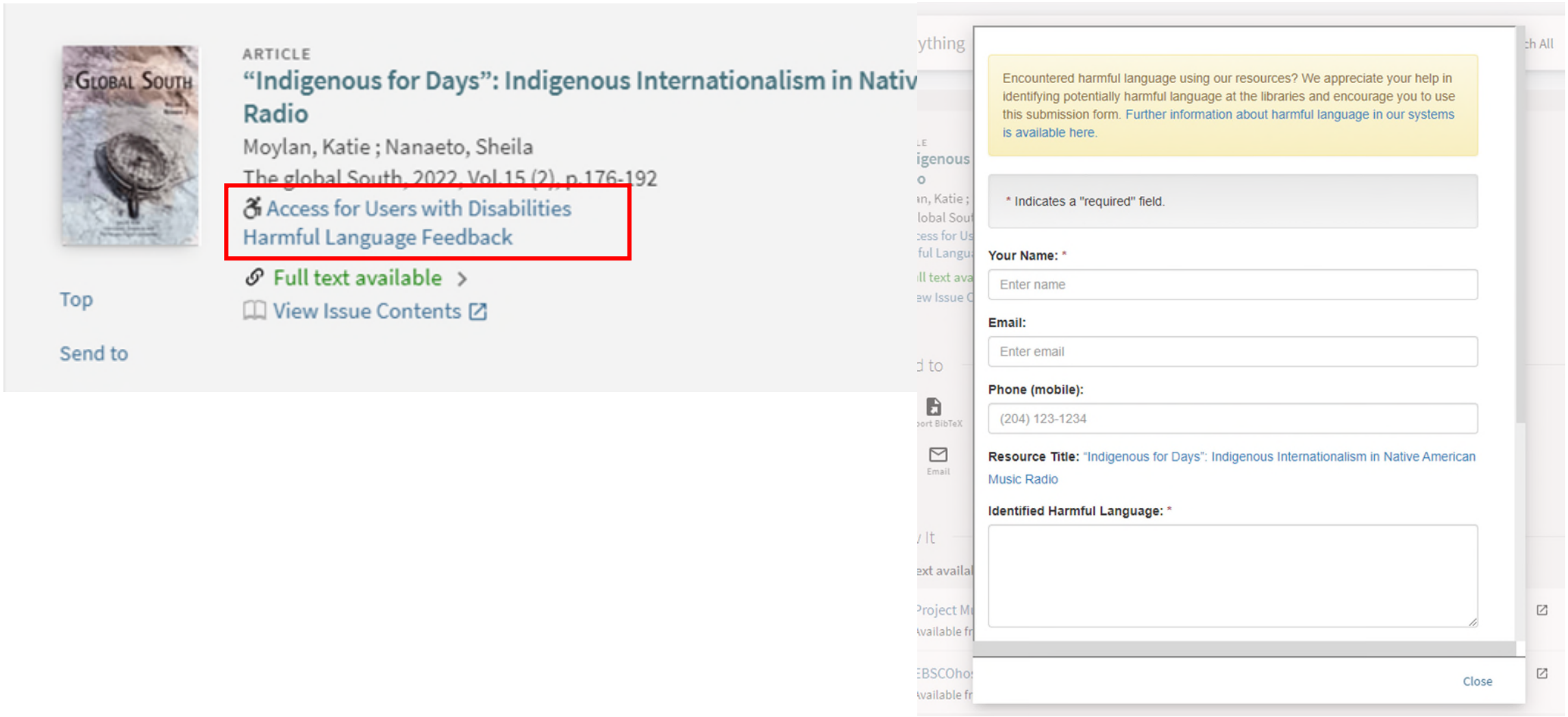
DEI in Library Practices



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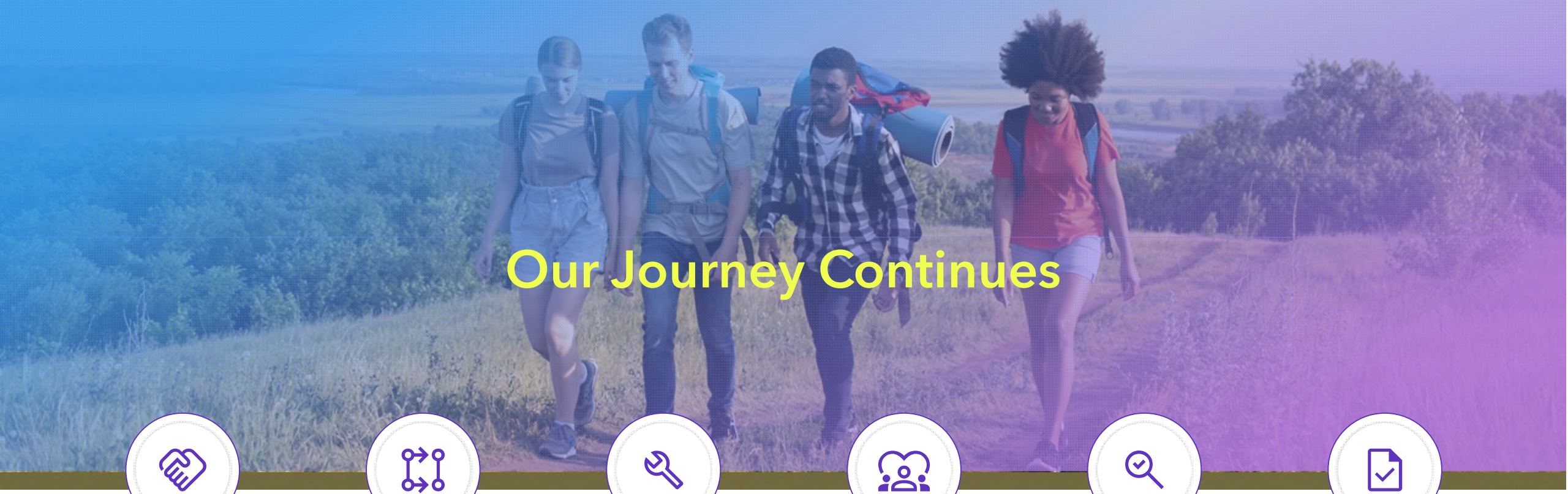

Our Journey Continues

- Collaborating with the community
- Working on new areas beyond Discovery
- Dialog as our main tool
- Growing our teams to cover more territory
- Looking for new ways of approaching DEI
- Including other voices, more content

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Visibility and Commitment

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

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DEI and the Role of the Community

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International Group of Ex Libris Users

Members

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Malaika Grant
University of Minnesota

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Dartmouth College

Michelle Bass
Harvard Library

Xiaoli Li
University of California, Davis

Julene Jones
University of Kentucky

Glenn Tozier
Monterey Peninsula College

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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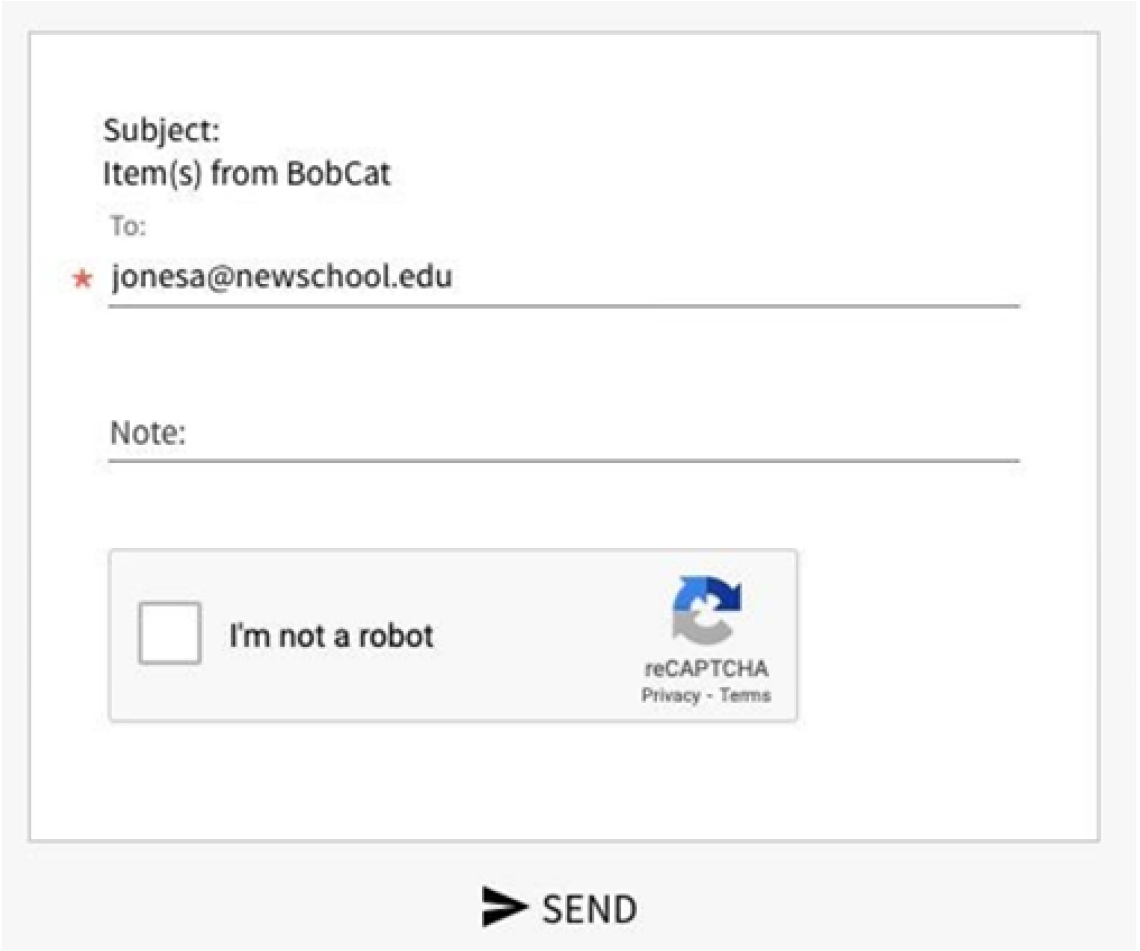
8298: Offensive Term Reporting Tool

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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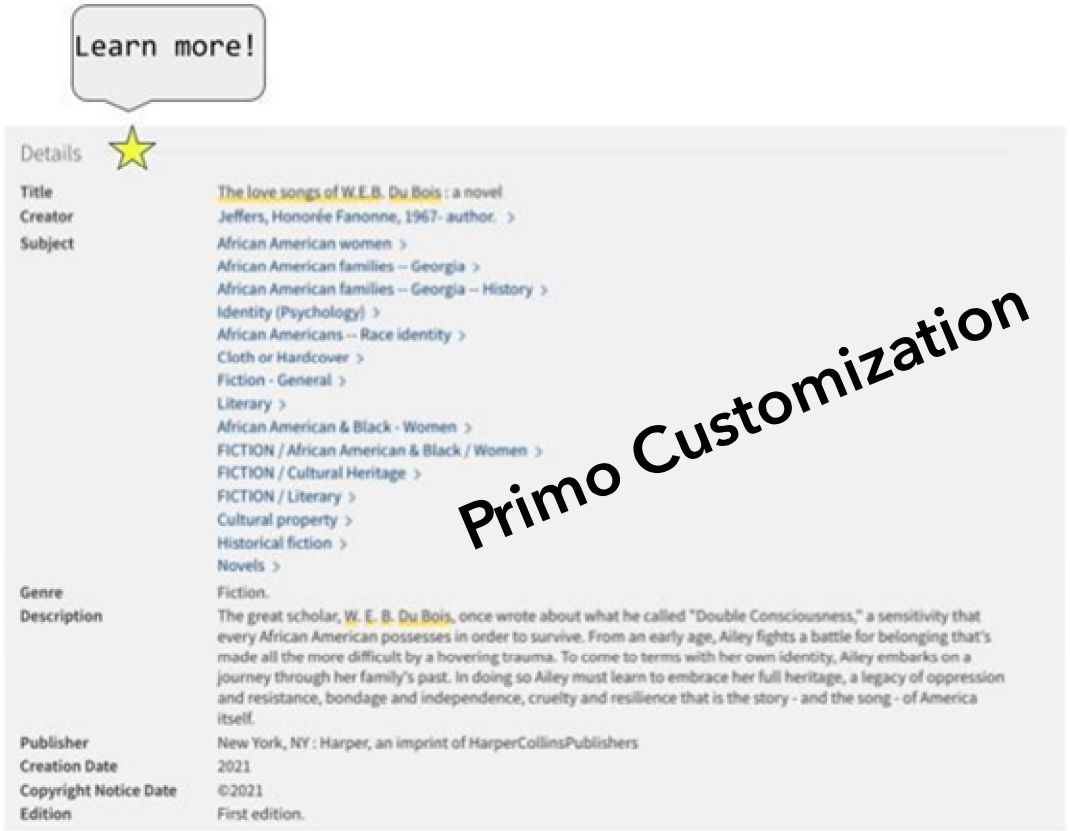
8299: Add a DEI Icon and Information Popup

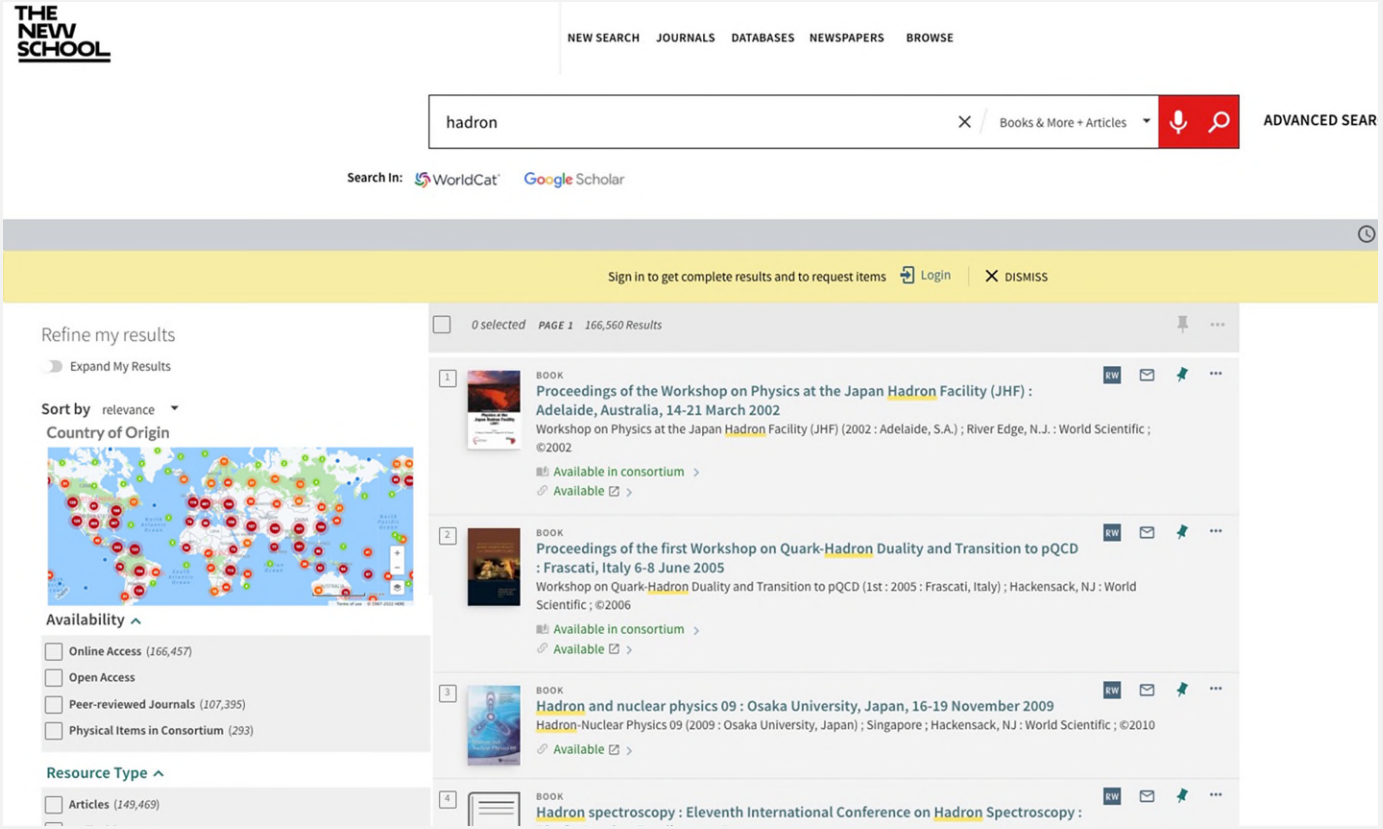
Add to each record an icon (question mark or other symbol) to hover over to learn more about metadata in details pane

- 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 cataloging/link to Library statement on critical cataloging.. Acknowledge that portions of our catalog over which we do not have control (i.e., CDI)
- Example statements
  - Statement on Inclusive Description
  - Harmful Language in the Library Catalog
  - Harmful Language (UMKC)



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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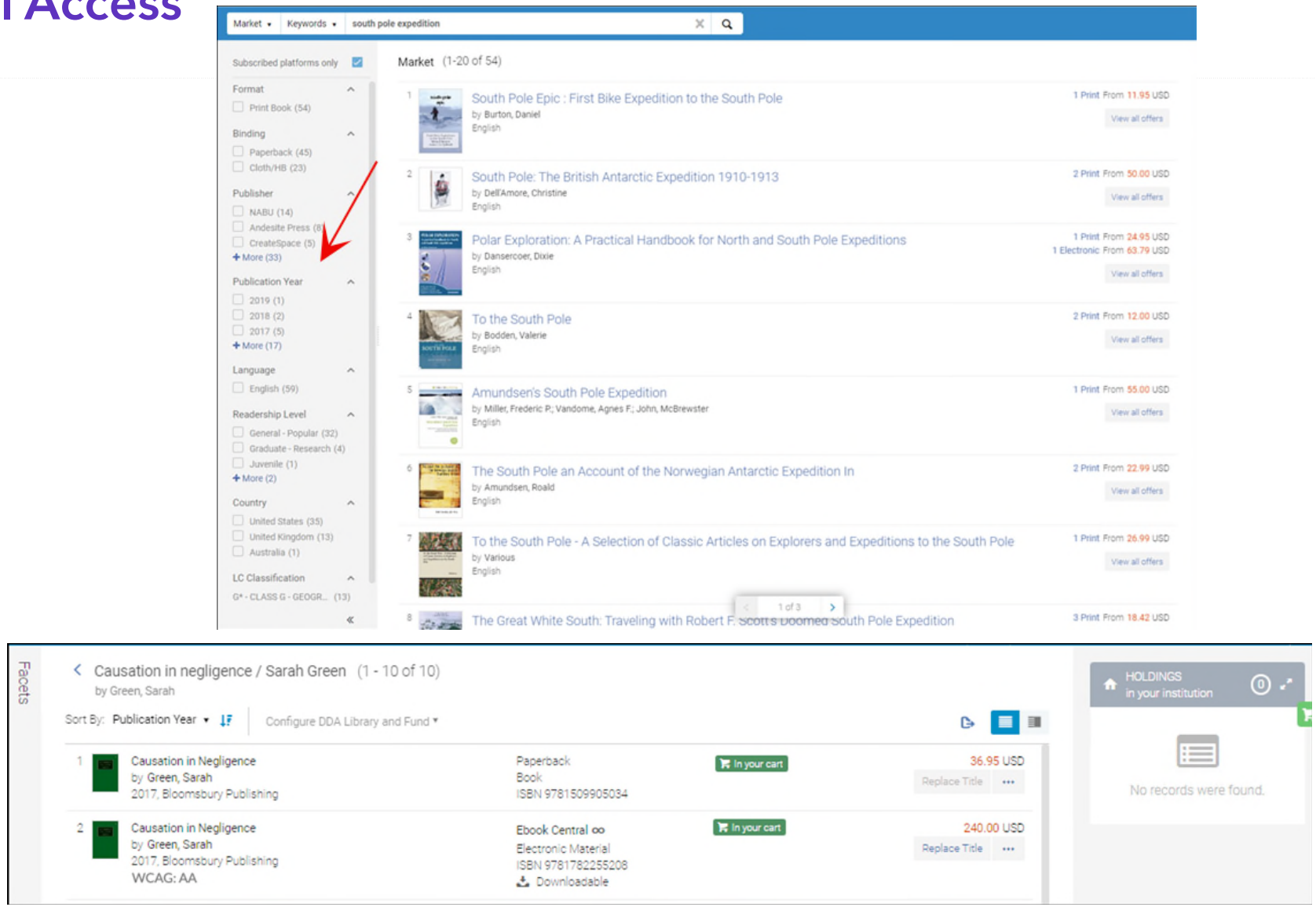
Measures of Universal Access

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.



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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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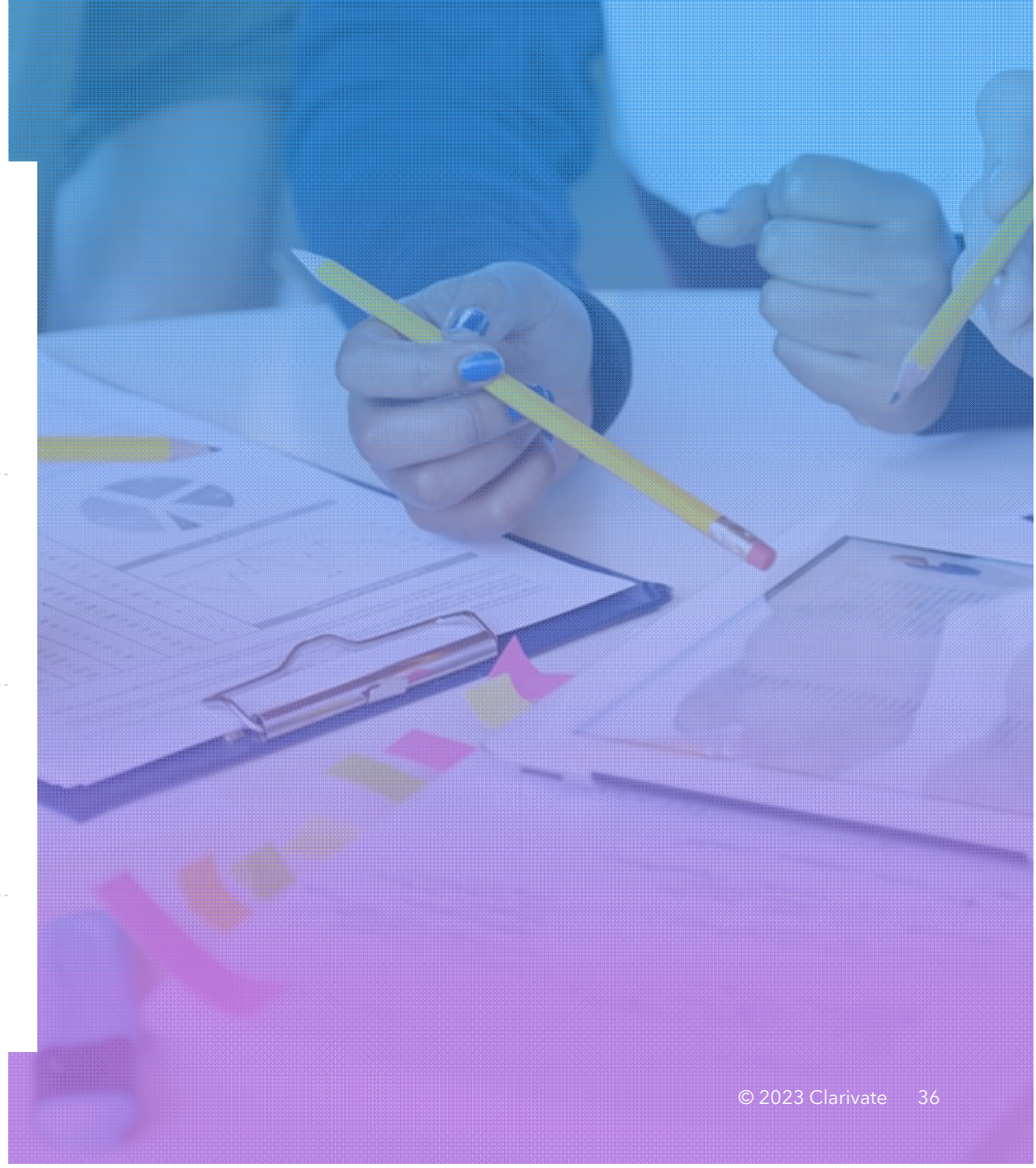
Enhancements Authoring – Q4 2023

- 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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