

ExLibris[®]
Part of **Clarivate**

IGOLU
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?

How is DEI Related to Ex Libris and its Products?

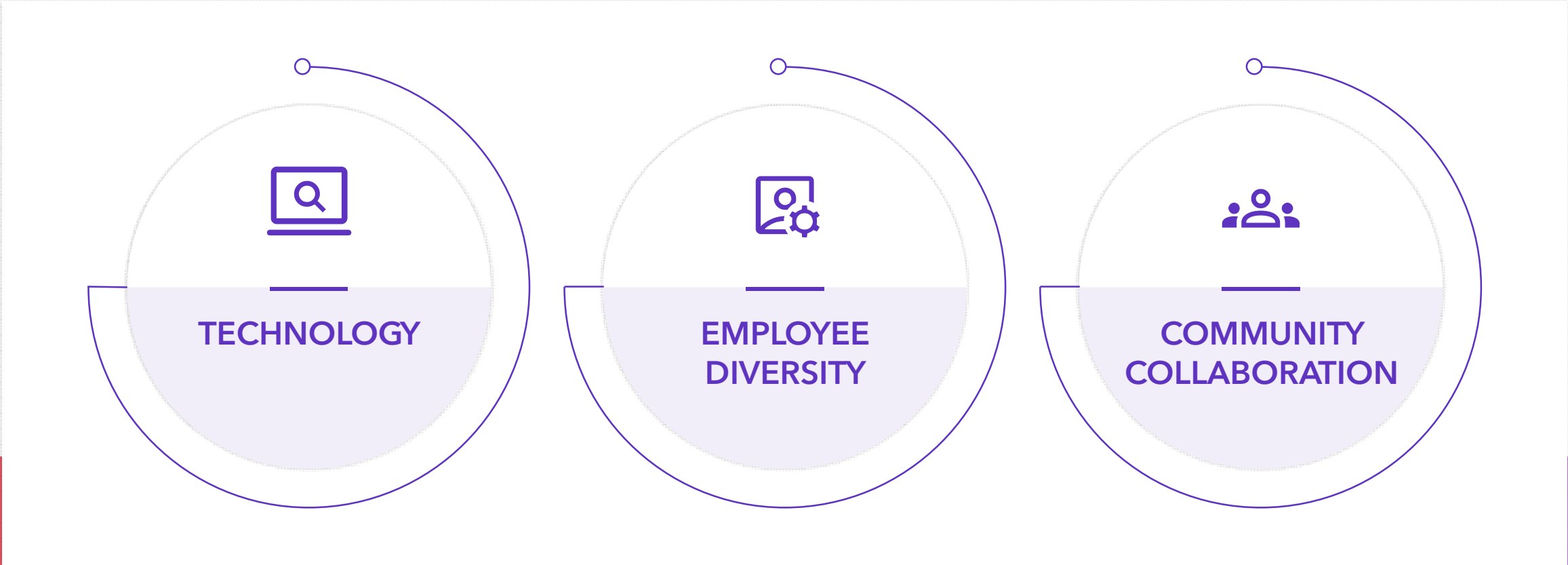


One of our top concerns is to **ensure that our systems are built for and serve everyone equally**. We are cognizant of the fact that unintentional/unconscious bias can be present in any product, system, algorithm, including ours

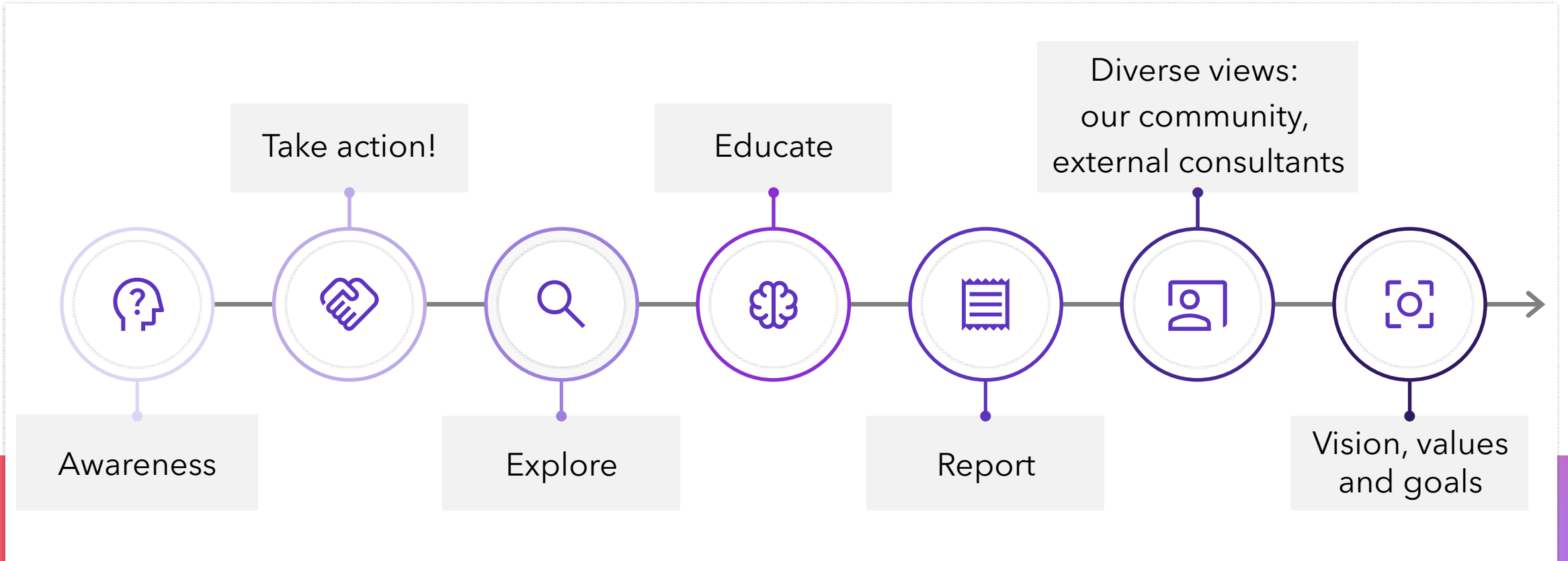


We as a company have an impact on many people and are **committed to help create a better, more compassionate future**

Our Approach and Focus Areas



DEI: Our Path



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



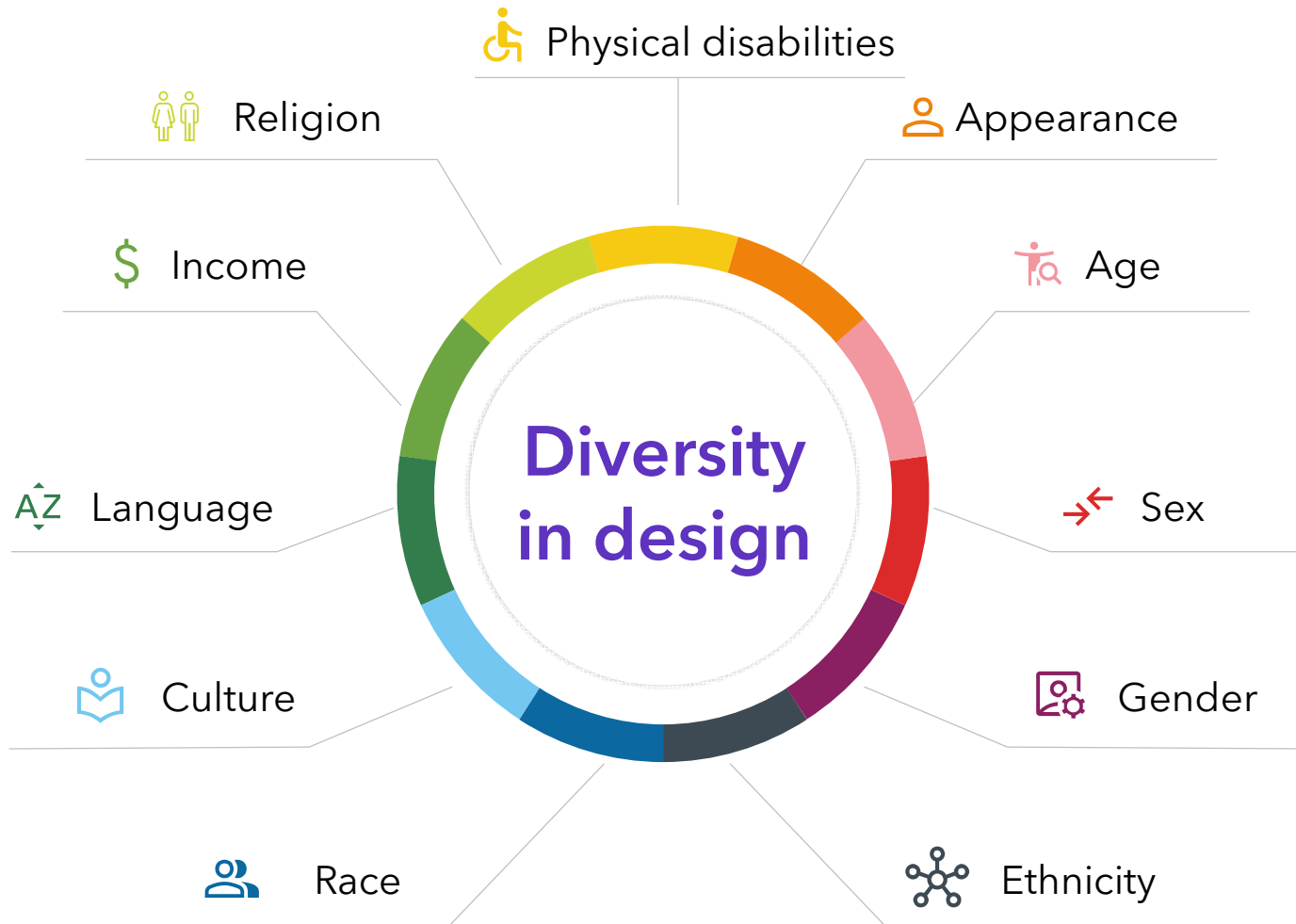
Somewhere around 2020 we started a discussion about DEI and what it meant for the library world



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



Diversity in Design





Judith Fraenkel • You
Senior Director of Product Management at Ex Libris
3m • 🌐

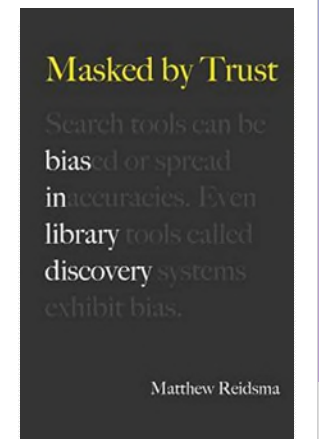
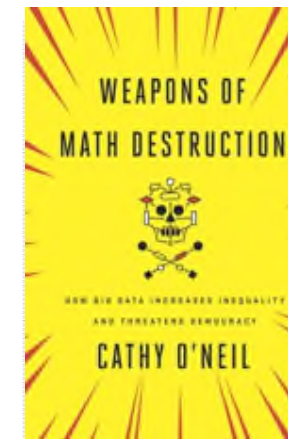
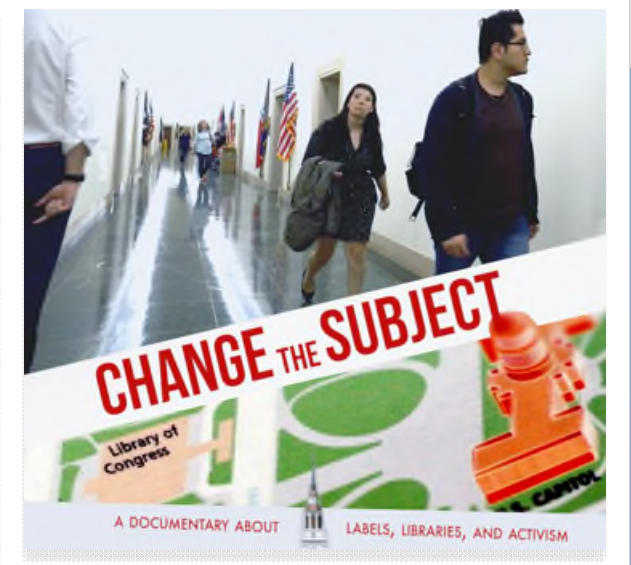


The DEI journey really starts when we make it part of our standard processes. Talking DEI today with our new EXL team leaders. Create safe spaces for the DEI dialogue, involve your new leaders, make it core! (and fun) [#deistrategy](#) [#libraries](#) [#diversityandinclusion](#)



DEI and Discovery

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



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

Inclusive Language Guidelines

TERM NOT TO USE

Whitelist

Blacklist

Scrum master

Blackbox

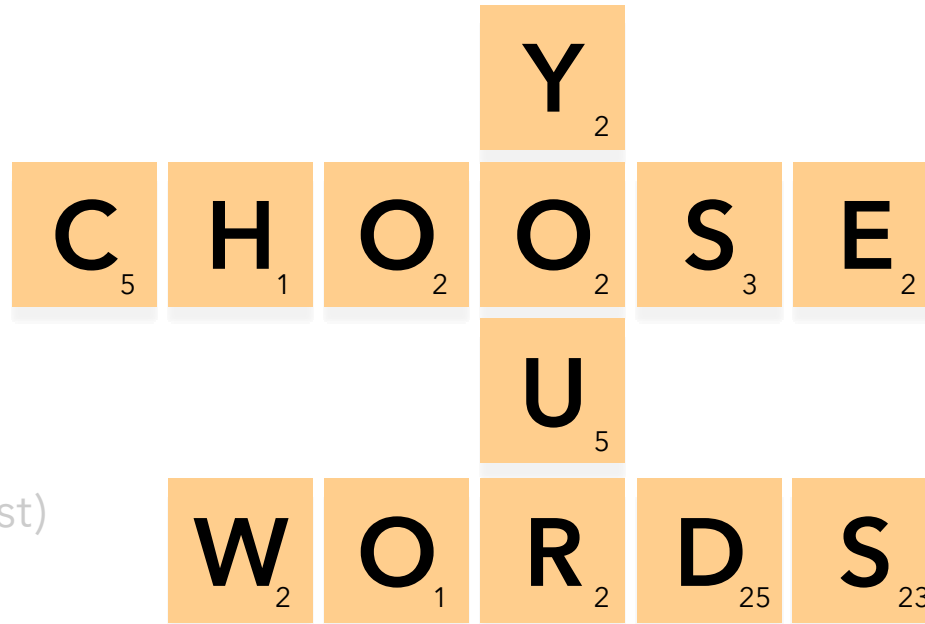
Whitebox

Dummy value

Master/Slave

Master (such as master list)

Native feature



TERM TO USE

Allow list

Deny list

Agile lead/Scrum Leader

Closed box

Clear box

Placeholder

Primary/Secondary or Parent/Child

Primary (such as primary list)

Core feature

Inclusive Language Guidelines

Terms 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





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

- Heather Hiles
Chair of Black Girls Code



Let's Not Miss the Opportunities We Have



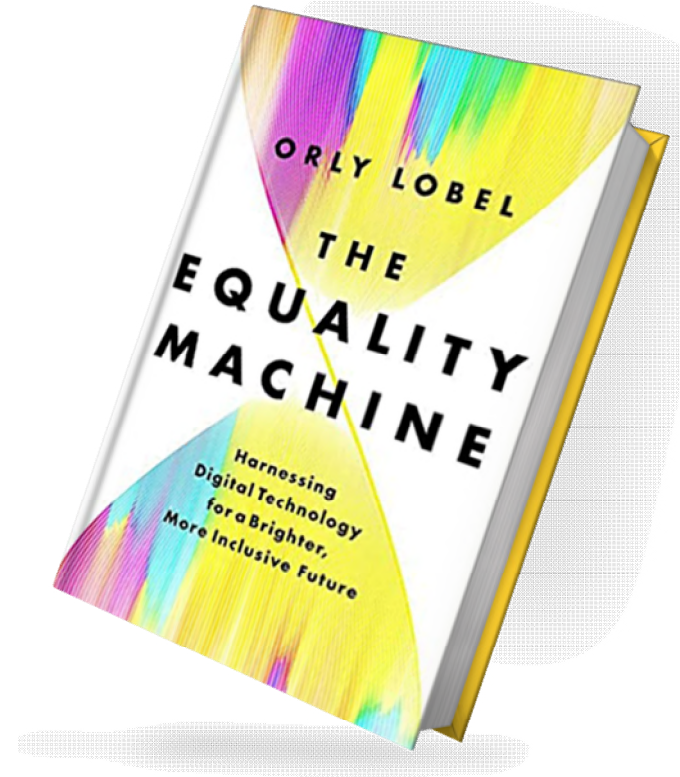
Ex Libris & Innovative educational programs

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

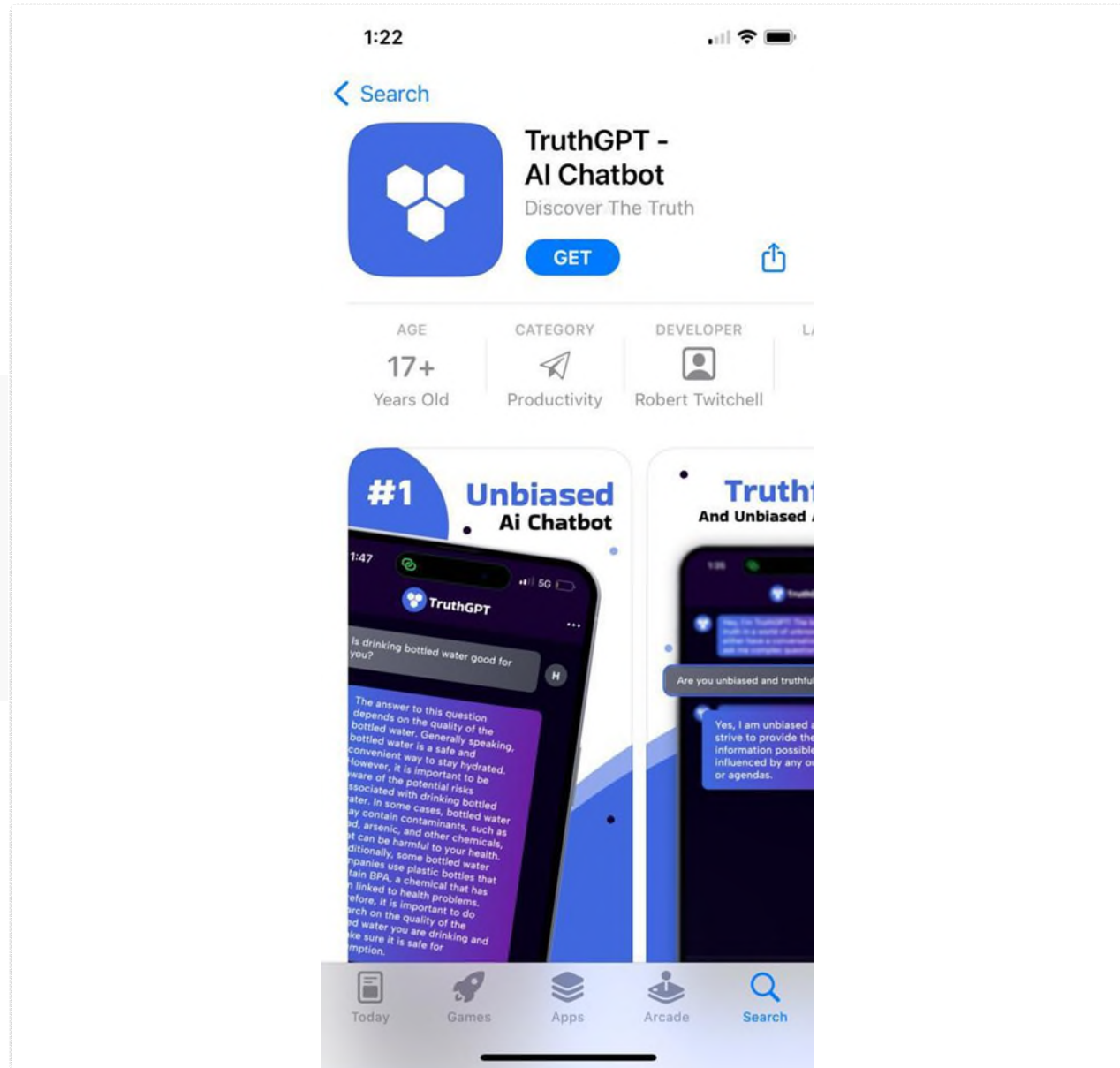


Orly Lobel

Award-Winning Author



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.

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?

DEI in Library Practices





ARTICLE

“Indigenous for Days”: Indigenous Internationalism in Native American Music Radio

Moylan, Katie ; Nanaeto, Sheila

The global South, 2022, Vol. 15 (2), p. 176-192

 Access for Users with Disabilities
Harmful Language Feedback

 Full text available >

 View Issue Contents 

Top

Send to

anything

ch All

Encountered harmful language using our resources? We appreciate your help in identifying potentially harmful language at the libraries and encourage you to use this submission form. Further information about harmful language in our systems is available here.

* Indicates a "required" field.

Your Name: *

Enter name

Email:

Enter email

Phone (mobile):

(204) 123-1234

Resource Title: "Indigenous for Days": Indigenous Internationalism in Native American Music Radio

Identified Harmful Language: *

Close

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

Visibility and Commitment



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

DEI and the Role of the Community



Members

Christine Stohn
Ex Libris

Angela Boyd
San Diego Community College

Vicky Jay Leung
University of Windsor

Judith Fraenkel
Ex Libris

Cindy Greenspun
Yale University

Judy Drescher
Molloy College

Hollie White
Curtin University

Julene Jones
University of Kentucky

Malaika Grant
University of Minnesota

Jill Baron
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

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

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 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 \(UMKC\)](#)

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 next to the "Details" tab, and a speech bubble containing the text "Learn more!" points to it. The record details include:

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, W. E. B. Du Bois, once wrote about what he called "Double Consciousness," a sensitivity that every African American possesses in order to survive. From an early age, Ailey fights a battle for belonging that's made all the more difficult by a hovering trauma. To come to terms with her own identity, Ailey embarks on a journey through her family's past. In doing so Ailey 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.

A large, diagonal watermark reading "Primo Customization" is overlaid on the right side of the screenshot.

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 the library website interface for 'THE NEW SCHOOL'. The search bar contains the term 'hadron'. Below the search bar, there are options for 'WorldCat' and 'Google Scholar'. A yellow banner prompts users to 'Sign in to get complete results and to request items'. The main content area shows search results for 'hadron' with 166,560 results. A 'Country of Origin' widget is visible, featuring a world map with red and green markers indicating the geographic distribution of the search results. The widget also includes an 'Availability' section with checkboxes for 'Online Access (166,457)', 'Open Access', 'Peer-reviewed Journals (107,395)', and 'Physical Items in Consortium (293)'. The search results list includes several books, such as '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'.

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.

A screenshot of a search results page for the keyword 'south pole expedition'. The page features a left-hand navigation panel with various filters such as 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 content area, titled 'Market (1-20 of 54)', displays a list of search results. Each result includes a book cover, title, author, and pricing information. The results are as follows:

Rank	Title	Author	Format	Price
1	South Pole Epic : First Bike Expedition to the South Pole	by Burton, Daniel	1 Print	From 11.95 USD
2	South Pole: The British Antarctic Expedition 1910-1913	by Dell'Amore, Christine	2 Print	From 50.00 USD
3	Polar Exploration: A Practical Handbook for North and South Pole Expeditions	by Dansercoer, Dixie	1 Print, 1 Electronic	From 24.95 USD, 63.79 USD
4	To the South Pole	by Bodden, Valerie	2 Print	From 12.00 USD
5	Amundsen's South Pole Expedition	by Miller, Frederic P.; Vandome, Agnes F.; John, McBrewster	1 Print	From 55.00 USD
6	The South Pole an Account of the Norwegian Antarctic Expedition In	by Amundsen, Roald	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	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

A screenshot of a book detail page for 'Causation in negligence / Sarah Green (1 - 10 of 10)'. The page shows two editions of the book. The first is a paperback edition from 2017, published by Bloomsbury Publishing, priced at 36.95 USD. The second is an 'Ebook Central' edition, also from 2017, published by Bloomsbury Publishing, priced at 240.00 USD. Both editions are marked as 'Downloadable' and 'In your cart'. The page also includes a 'Facets' sidebar on the left and a 'HOLDINGS in your institution' section on the right, which currently shows 'No records were found.'

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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