

**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?

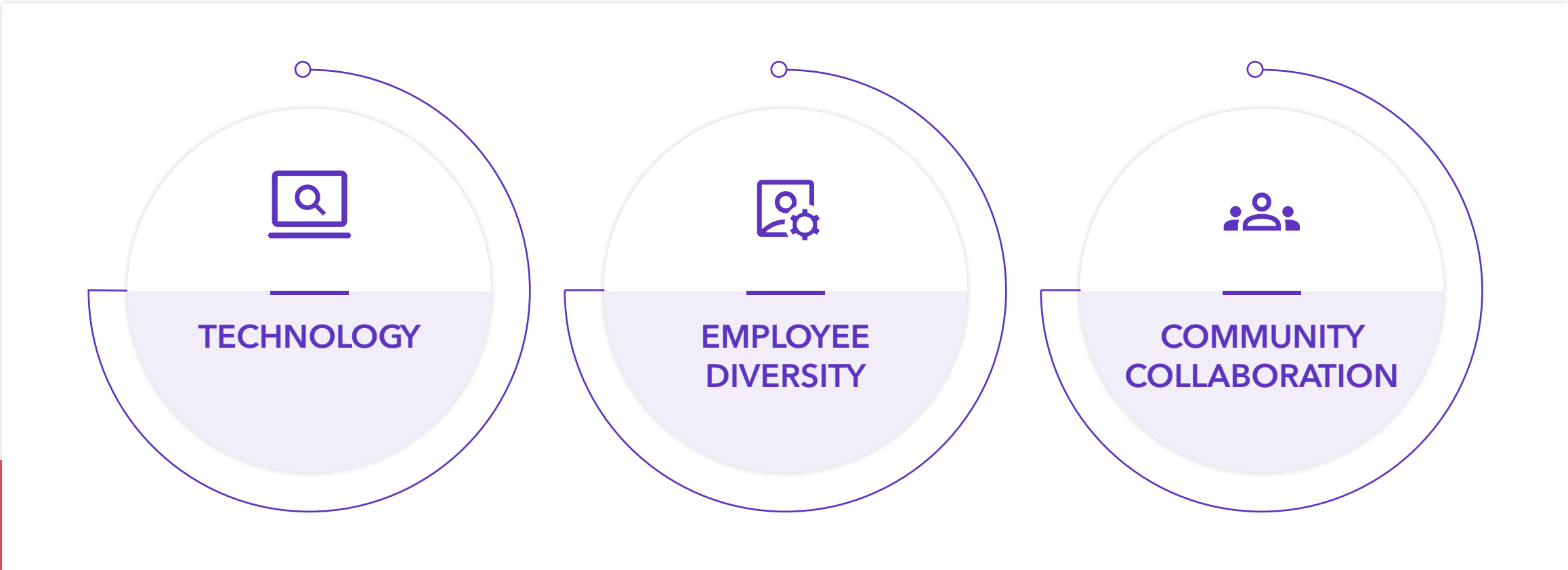


One of our top concerns is to **ensure that our systems are built for and serve everyone equally**. We are cognizant of the fact that unintentional/unconscious bias can be present in any product, system, algorithm, including ours

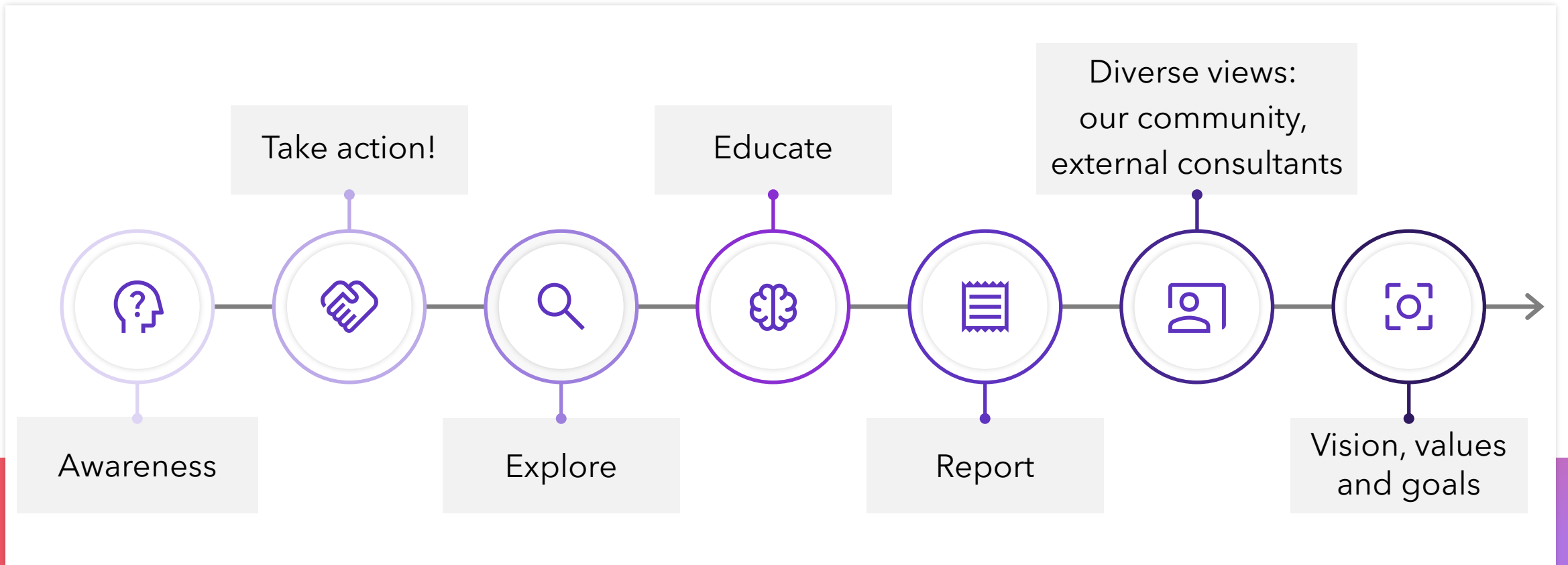


We as a company have an impact on many people and are **committed to help create a better, more compassionate future**

# 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

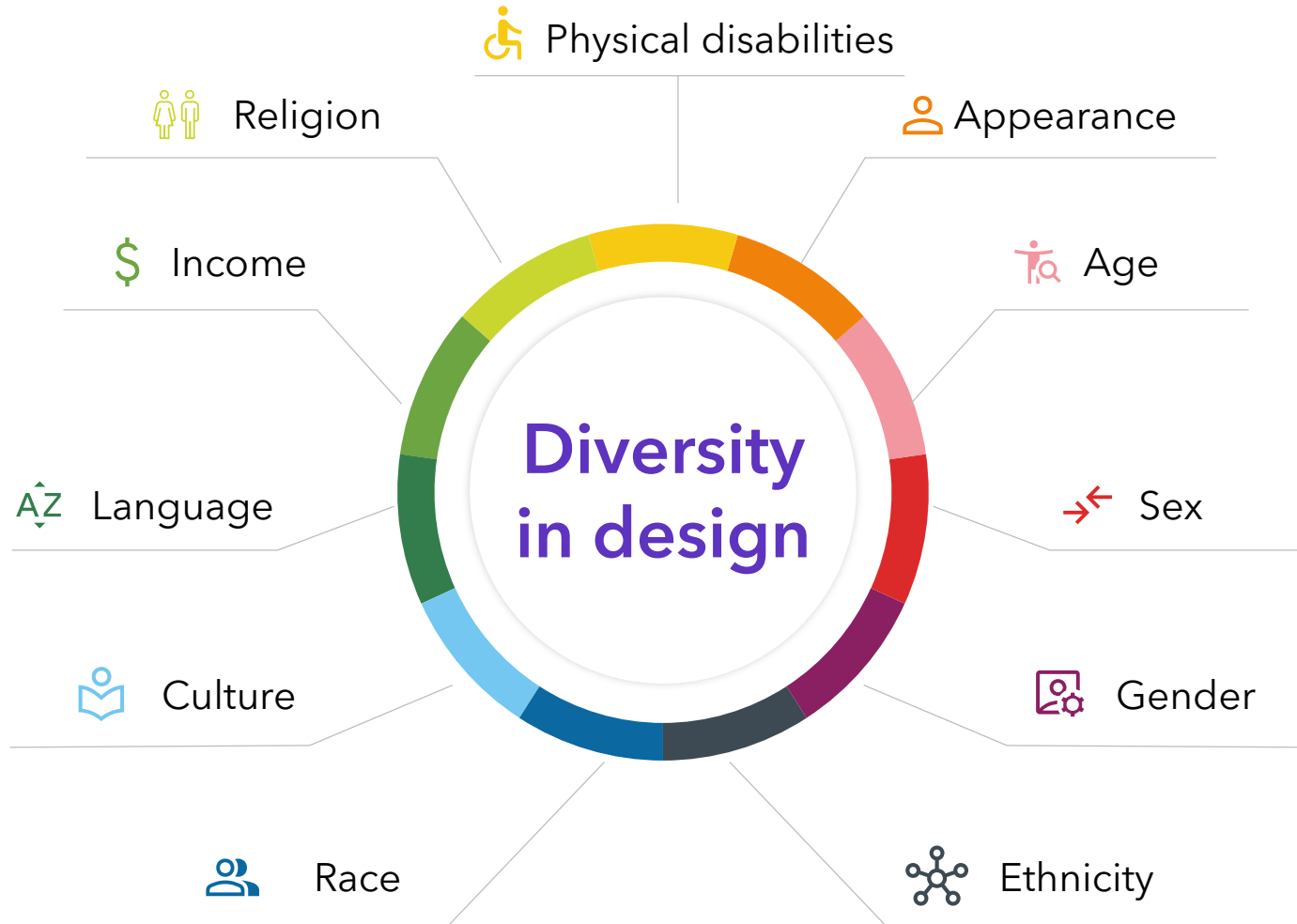
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Two very significant steps were initiated during this initial period: The creation of two groups...



# Diversity in Design





# An ethical approach to product design and development





Judith Fraenkel • You

Senior Director of Product Management at Ex Libris

3m • 🌐

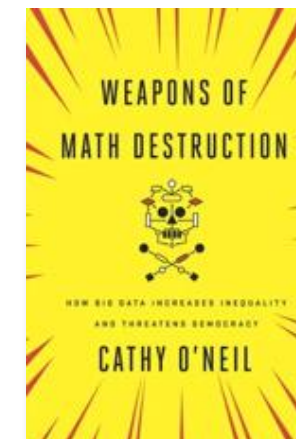
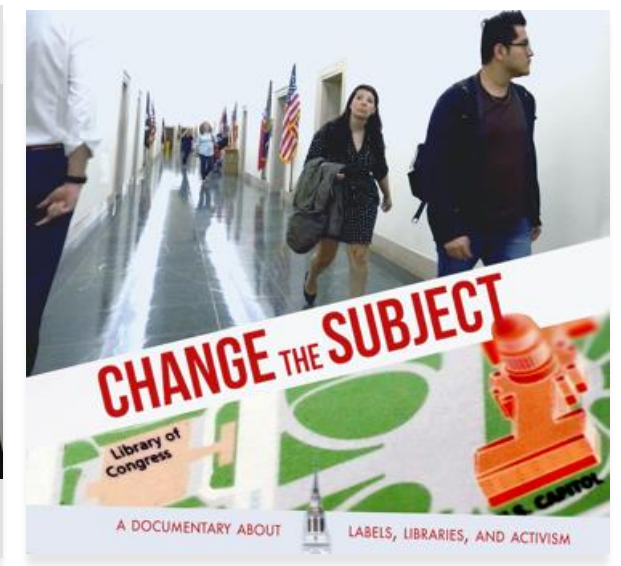


The DEI journey really starts when we make it part of our standard processes. Talking DEI today with our new EXL team leaders. Create safe spaces for the DEI dialogue, involve your new leaders, make it core! (and fun) #deistrategy #libraries #diversityandinclusion



# 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

# 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



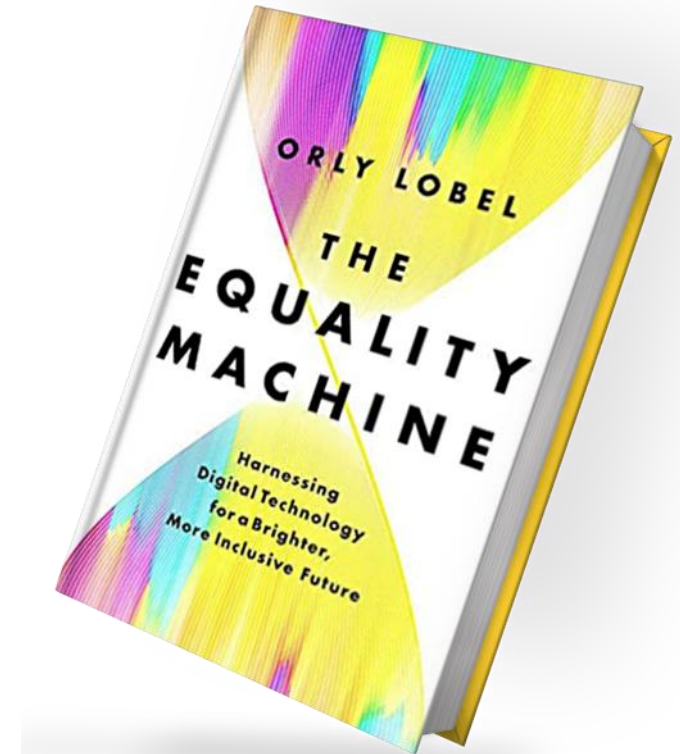
## Ex Libris & Innovative educational programs

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



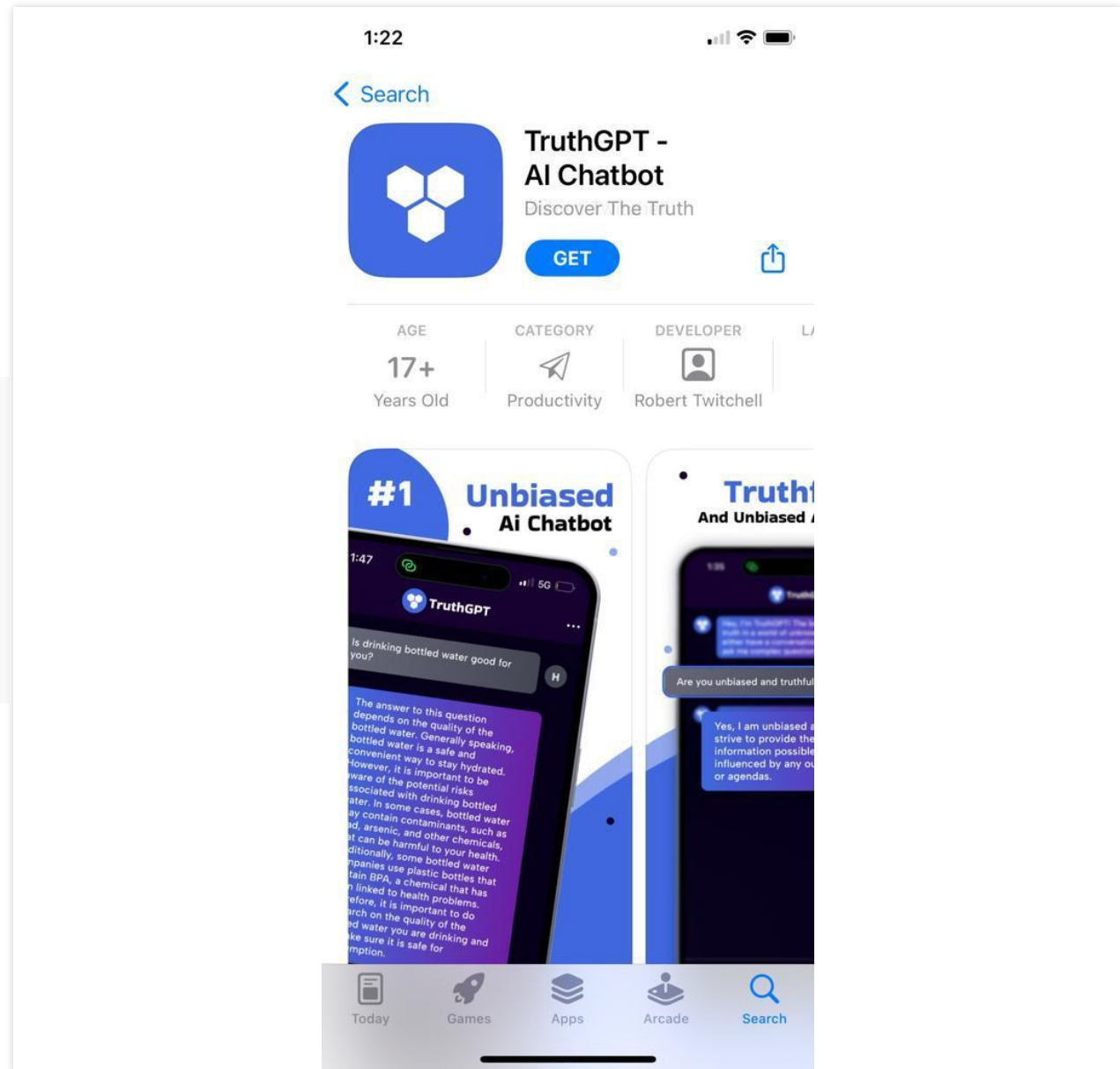
## Orly Lobel

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

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

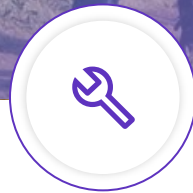
# Our Journey Continues



Collaborating with the community



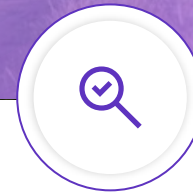
Working on new areas beyond Discovery



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

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- User Story - What does a "diverse" result set/discovery experience look like?

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- User Story - What types of tools are needed for collection assessment? Purchasing?

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- User Story - How to report offensive language? To Whom?

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- 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.

The screenshot shows a web form for reporting offensive content. It includes a 'Subject' field with the text 'Item(s) from BobCat', a 'To' field with the email address 'jonesa@newschool.edu' marked with a red star, and a 'Note' field. Below the form is a reCAPTCHA widget with the text 'I'm not a robot' and a 'reCAPTCHA Privacy - Terms' link. A 'SEND' button is located at the bottom right of the form area.

# 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" by Jeffer, Honorée Fanonne. A yellow star icon is placed above the "Details" section, which has triggered a "Learn more!" popup. The "Details" section lists various subject terms such as "African American women", "African American families -- Georgia", and "Identity (Psychology)". The "Description" section contains a paragraph about the author's work and the book's themes. The "Publisher" is listed as Harper, an imprint of HarperCollins Publishers, and the "Edition" is the 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 shows a search interface for 'hadron' on 'THE NEW SCHOOL' website. The search results are displayed on 'PAGE 1' with 166,560 results. A 'Country of Origin' widget is visible, featuring a world map with colored markers indicating the geographic origin of the search results. The widget includes a 'Refine my results' section with an 'Expand My Results' toggle and a 'Sort by' dropdown set to 'relevance'. Below the map, there are filters for 'Availability' (Online Access: 166,457; Open Access; Peer-reviewed Journals: 107,395; Physical Items in Consortium: 293) and 'Resource Type' (Articles: 149,469). 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'. Each result includes a book cover, title, subtitle, location, date, and publisher information, along with icons for availability and additional actions.

# 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.

Market (1-20 of 54)

- 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 Dell'Amore, Christine English 2 Print From 50.00 USD
- 3 Polar Exploration: A Practical Handbook for North and South Pole Expeditions by Dansercoet, 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 Unlabeled South Pole Expedition 3 Print From 18.42 USD

< Causation in negligence / Sarah Green (1 - 10 of 10) by Green, Sarah

Sort By: Publication Year | Configure DDA Library and Fund

1	Causation in Negligence by Green, Sarah 2017, Bloomsbury Publishing	Paperback Book ISBN 9781509905034	In your cart	36.95 USD Replace Title ...
2	Causation in Negligence by Green, Sarah 2017, Bloomsbury Publishing WCAG: AA	Ebook Central Electronic Material ISBN 9781782235208 Downloadable	In your cart	240.00 USD Replace Title ...

Facets

HOLDINGS in your institution

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?

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- Is this something the user community wants (ACRL Study, 2023)?

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- How does representation influence AI training models?

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- How is bias addressed within large LLMs?



# Thank You

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