# Diversity, Equity and Inclusiveness Enhancements

Community College League of California (cclleague.org)

# Introduction to DEI in Search Advisory Group

- Quarterly reports to IGeLU, ELUNA steering committees, and Working Groups on topics, discussions, and recommendations that they will be making to Ex Libris (standing agenda item at Joint SC/Coord meeting)
- Address issues of potential bias in Ex Libris Products
- Consult on features within the Central Discovery index (CDI) that would address problematic, potentially offensive, metadata from content providers
- Identify tools and resources that could be used to inform and engage the broader end-user community
- Present at IGeLU and ELUNA annual meetings
- Produce an annual report with measures of group impact.

#### Introduction to Enhancement Process

- ELUNA / IGeLU is unique in that a for-profit company has a memorandum of understanding on their development process
- Each product has its own allocation of development points that can be used for features that it wants to implement
- Ex Libris and working groups monitor development, provide feedback and negotiate acceptance criteria
- Enhancement is with the community, not a customer

# DEI in Search Advisory Group Timeline

2020-2021

Created DEI in Search Advisory Group

Discussed process for term suppression and debated over global vs. local exclusion list 2021-2022

Worked with ProQuest and Ex Libris on DEI taxonomy In E-books

Examined cataloging and authority issues affecting reconciliation work 2022-2023

Authored features for 2023 Enhancement Process

Wrote guidelines on authoring product documentation 2023-2024

Monitor feature development

Work with CWG on inclusion of under-represented regions/publishers

Study bias in search results of Primo/Summon

# Thank you

Megan Kinney, City College of San Francisco

Angela Boyd, San Diego Community College

Glenn Tozier, Monterey Peninsula College

Carina Love, Cuesta College

#### Accessibility -

Tracking accessibility ratings across Providers, Interfaces and Titles

Setting Funding Goals and Reports for statistical categories such as accessibility ratings (acquisitions)

Authorities / Resource Management

Addressing major problems with authority management

Respect MARC subfield coding when linking bib headings

Allow partial linking of name/title headings

Allow for more partial linking and flipping of subdivided LCSH headings (late 2024/2025?)

#### **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

#### 8294: Network Zone - based exclusion tool

User story: in the NZ discovery manager role, I would like to centrally manage my stop list across all institutions within my network zone. I would also like the institution to have the freedom to make changes/edits/manage the list if they choose or reconnect to the centrally managed list.

8295: Allow substrings for text matching, not just exact text matches

#### **Current Behavior**

Example subject heading	Suppression of term in full display
Illegal aliens	yes
Illegal aliens – Canada	no
Children of illegal aliens – Education-Law and Legislation	no

8295: Allow substrings for text matching, not just exact text matches

#### **Desired Behavior**

Example subject heading	Suppression of term in full display
Subject term - string literal	Illegal aliens
Subject term - subheadings / directional wildcard	Illegal aliens - %
Subject term - bi-directional wildcard	% illegal aliens %

#### 8296: DEI Substitution Tool

User story: As an institution, I want to substitute offensive phrases in subject metadata for more culturally appropriate/sensitive terminology within the Primo display. Ideally, these terms and their substitutes could be managed at the network zone level to support centralized management with an institution's ability to customize/add terms to the inherited code table.

8296: DEI Substitution Tool

#### **Desired Behavior**

	Subject term - string literal	Illegal aliens	Undocumented immigrants	
Subject term - Illegal aliens – Canada subheadings		Illegal aliens – Canada	Undocumented immigrants - Canada	
	Embedded subject terms	Children of illegal aliens – Education-Law and Legislation	Children of undocumented immigrants – Education-Law and Legislation	

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:

- Value of term
- Link to explanatory source
- 3. Short explanation text blob
- 4. Image URL
- 5. Date updated
- 6. Contact link (either mailto: or https:// link)



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.

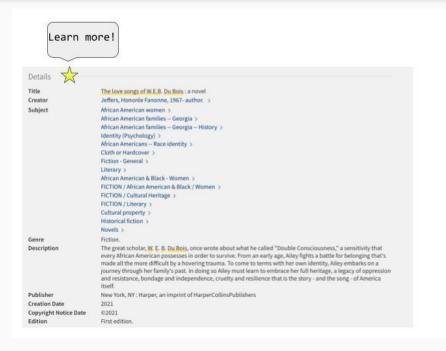
To:	
jonesa@newschool.edu	
Note:	
I'm not a robot	
	reCAPTCHA Privacy - Terms
	51 F 1 S 1 S 1 S 1 S 1 S 1 S 1 S 1 S 1 S

#### 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)

8299: Add a DEI icon and information popup

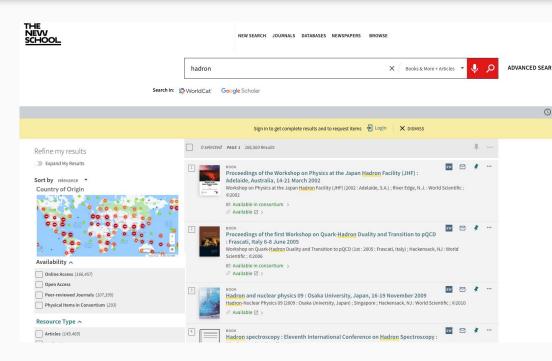


#### 8300: Country of Origin Widget

- 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



8301: Match CDI keywords against LCSH or widely used thesauri

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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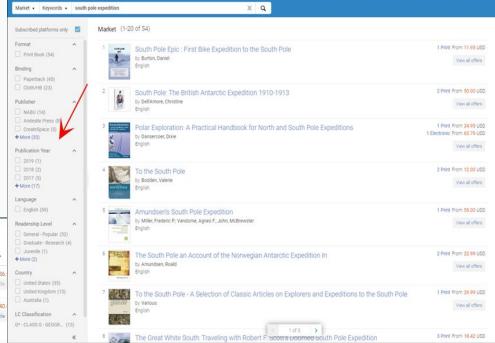
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#### Measures of Universal Access

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).

# Enhancement Votes

EIII	lance	ment	votes

to NERS

**Submit Enhancements** 

Until Feb 4, 2023

Until Feb 20, 2023

Until Jan 28, 2023

**First Round of Voting** 

Apr 4 – Apr 21, 2023

Mar 12, 2023 – Apr 2,

Mar 19-Apr 8

2023

**Second Round of Voting** 

Jun 12 -Jun 25, 2023

May 30 – Jun 10, 2023

Jun 4, 2023 – Jun 18,

2023

**Product** 

Alma

Leganto

Primo

# **Enhancement Tips**

Please verify your login information to NERS (ners.igelu.org) before you need it.

Community members should have spreadsheets of proposed community enhancements for products. (I will send to Caroline Sinay Gudiel after this meeting)

Vote 3-5 enhancements with more points rather than a lot of enhancements with few points.

Collaborate on voting - the more institutions that vote for a particular enhancement, the higher the likelihood the enhancement will be implemented.

# **ELUNA Annual Meeting - 2023**



# Thanks! Questions?