MEMO

TO: Amy Ferrer, Executive Director, American Philosophical Association
FROM: The “Philosophy Exception” database project team
Alison Wylie, Matthew Smithdeal, Jas Heaton, Kristin Conrad-Kilgallen, Alice Everly, Cam Gilbert
DATE: October 7, 2022
RE: APA Small Grant Report

We thank the APA for providing us essential support for the project we outlined in our 2021 submission, “Creating an Open Access Bibliographic Database for Equity, Diversity and Inclusiveness Philosophy Literature.”

We’re glad to report that we have successfully built a searchable web-based bibliographic database of EDI-Philosophy publications, as proposed. In some respects this has been a simpler process than we anticipated, but it has also posed some challenges which we outline below. It has involved designing a faceted search system, reviewing each of ~260 entries to confirm bibliographic details and assign search terms and categories, and building and migrating content to a new website. We have contacted everyone identified as an editor or author in the database to ask them to review their entries and advise of other publications we should add. We are in the process of updating the database in light of their feedback and intend to launch a fully public version of the new website in early November. Once launched, the new version of the website will be accessible using the original URL: https://www.thephilosophyexception.ca

Here is a link to the draft version of the website/database:
The Philosophy Exception, DRAFT Version 2:
https://arts-thephilosophyexception-2022.sites.olt.ubc.ca

What follows is a more detailed account of what we’ve done, our plans going forward, and how we’ve used the funds provided by the APA and matching sources of support.

What we’ve done
Our original intention was to build a bespoke database that could be embedded in the existing static Philosophy Exception website. In the process of working on this project our plans evolved in three ways.

First, our steering committee recommended that, instead of building a database from scratch, we make use of a WordPress plug-in, newly available through the UBC Centre for Teaching, Learning and Technology (CTLT), that supports faceted search functionality. By opting to pursue this option, the design and implementation process was simplified in some ways, but complicated in others. For example, we could no longer embed a database in our existing website; we had to rebuild the website on a WordPress platform. Luckily, we were able to integrate the graphics from the original website, which minimized anticipated design expenses. We also had access to considerable, no cost technical support from UBC for designing the database and constructing the new website. Likewise, because the Philosophy Exception website is now hosted on UBC servers we are assured of UBC IT support going forward and there will be no costs associated with maintaining and hosting the website.

A second shift in plans related to the development of a metadata and facet structure that supports robust search and filter functionality. This was to be undertaken by Alice Everly, a graduate student in the Masters of Archival Studies and Library and Information Studies (LIS), as part of a hands-on, for-credit learning program. She was unable to find a professor in LIS who could supervise this project so she has been employed as a Graduate Assistant to do this work. The facet structure she developed, with advice from our steering committee, is attached to this memo as Appendix I.

1 Steering committee: Will Engel, Strategies, Open Education Initiatives, Centre for Teaching, Learning and Technology, University of British Columbia; Erin Fields, Open Education and Scholarly Communications Librarian, Digital Initiatives, Walter C. Koerner Library, University of British Columbia.
The third shift in our plans arose when the design stage was completed and we began transferring data from the original website to the database, sourcing missing data, and categorizing and tagging each entry. We initially envisioned this as a fairly straightforward data entry process and had intended to hire undergraduate research assistants to undertake this task. It quickly became clear, however, that substantial background knowledge was required to accurately source bibliographic data and assign search terms, so we relied for this stage of the project on the team of graduate research assistants who were already familiar with the material. While this was more expensive, given a higher hourly rate for graduate assistants, it was a more efficient process, and one that we believe has resulted in a more robustly searchable database than if we had opted to hire, train, and supervise undergraduate assistants.

In the original website the publications were displayed as static citations listed under four broad categories. Each publication now appears in the database as a unique entry that includes considerably more information than the basic citation data we had originally compiled: abstracts, keywords, and links to the Google Scholar listings so users can easily pull a citation in any format. To be easily searchable, every publication is also categorized and tagged according to our facet schema.

To streamline the process of updating and transferring entries to the database, the project manager, Matthew Smithdeal, designed a Qualtrics survey structured to match the structure of the templates that would be used to add entries to the database. When all entries were recorded in Qualtrics, we then exported the Qualtrics data into an excel file that could be used to systematically enter this data into the WordPress database by team members. To ensure consistency across entries, Smithdeal created a user manual and style guide and, to further cross-check the accuracy of content and format, we asked each member of the team to upload WordPress entries they had not worked on at the Qualtrics stage of the process. This meant that the categorization and tagging of each entry was checked by a second team member, in addition to which Smithdeal subsequently reviewed all entries for consistency of format. The manual and style guide have been updated based on feedback from this process and revised; it is designed to support an ongoing process of keeping the database current and ensuring consistent, searchable content. This manual is attached as Appendix II.

As of September 24th a link to the draft version of the website has been sent to everyone listed as an author or editor of a publication in the database with a request that they check the accuracy of their entries, fill in missing details (especially abstracts and keywords where these did not appear in the original publication), and suggest additional entries. Appendix III includes the request email sent to authors and editors.

Next steps
We are currently in the process of incorporating feedback from the authors and editors we contacted in September. In addition to general advice about the database design and corrections to specific entries, we have received suggestions of nearly 50 additional publications to include. We are reviewing these and will be adding them, as appropriate, to the database in the next month. We are also addressing a few remaining minor technical issues. We will have these tasks completed by the end of October and will publicly launch the website and database in early November. The domain name for the existing website will be remapped to direct to our new website and database, so existing published links should not need to be updated. We are in the process of planning this public launch, which will include outreach to prominent philosophy blogs and news outlets.

Following the public launch our efforts will be directed towards implementing a system for documenting site usage and finalizing plans for an ongoing process of soliciting and entering updates as new EDI-Philosophy publications appear. The UBC-based steering committee will continue to advise and a number of colleagues, at UBC and elsewhere, have volunteered to join us in developing future initiatives; in the next few months we will formalize a working group that can ensure the long-term sustainability of this resource. Our priority in the next year is to draft abstracts and keywords for entries that currently lack them, and in the longer term we would like to expand the database to include relevant non-English language publications.
Budget report
We received $4,982 USD from the APA; at the then-current exchange rate this converted to $6,982 CAD, and we had anticipated receiving an additional $2,980 (CAD) from other sources, not including in-kind contributions. The original budget included several categories of salary: project management and coordination; data entry; graphic design; website construction and database migration; launching and promoting the website. In the end, a core team of six – five graduate students and one faculty member – undertook all the work required to complete these tasks.

As indicated above, we decided not to rely on undergraduate assistants for data entry which resulted in an increased hourly rate for time to accomplish this task. This also meant that we could not apply for UBC Work-Learn funding to subsidize part of salary item as originally planned. We also took on the additional expense of employing Alice Everly to design the faceted search system when it proved infeasible for her to do this for course credit.

At the same time, the decision to reconstruct the Philosophy Exception website on a UBC-supported WordPress platform reduced some anticipated expenses. The project lead, Matthew Smithdeal, constructed the WordPress website and database, and populated it with the existing graphics and text, so we did not have to enlist the services of a graphic designer and we received invaluable support from WordPress and database experts in CTLT and the UBC Library at no cost to the project. The overall cost of the project was higher than expected, but the APA’s contribution was matched by funds drawn from Alison Wylie’s Canada Research Chair grant. The table below provides a summary of the actual costs of the project broken out by category of expense and allocated to source.

<table>
<thead>
<tr>
<th>Item</th>
<th>APA funds</th>
<th>Other sources</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary for project management/coord</td>
<td>$3,444 CAD</td>
<td>$3,444 CAD (CRC funds)</td>
<td>$6,888 CAD</td>
</tr>
<tr>
<td>(200 hours @ $34.44/hr)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salary for search design</td>
<td></td>
<td>$900 CAD (CRC funds)</td>
<td>$900 CAD</td>
</tr>
<tr>
<td>(30 hours @ $30/hr)</td>
<td></td>
<td>CTLT/UBC library</td>
<td></td>
</tr>
<tr>
<td>(15 hours – in kind contribution)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salary for data search/entry</td>
<td>$3538 CAD</td>
<td>$1742 CAD (CRC funds)</td>
<td>$5280 CAD</td>
</tr>
<tr>
<td>(176 hours @ $30/hr)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salary for consultation/launch</td>
<td></td>
<td>$600 CAD (CRC funds)</td>
<td>$600 CAD</td>
</tr>
<tr>
<td>(20 hours @ $30/hr)</td>
<td></td>
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</tr>
<tr>
<td>Total</td>
<td>$6,982 CAD</td>
<td>$6,686 CAD</td>
<td>$13,668 CAD</td>
</tr>
</tbody>
</table>

($4982 USD)
Appendix I: Facet Schema

Primary Themes (4)
- Calls to Action
- Documentation
- Theorizing
- Interventions

Item type (10)
- Journal article
- Book
- Edited Volume
- Book chapter
- Conference Paper
- Thesis
- Periodical
- Report
- Blog Post
- Miscellaneous

Dimensions of Diversity (12)
- geographical
- race/ethnicity
- Indigenous
- socio-economic status
- gender
- transgender identity
- sexual orientation
- disability
- neurodiversity
- first generation
- intersectional
- unspecified demographic

Status or role (8)
- Undergraduate
- Graduate
- Post-doctoral
- Tenure track faculty
- Non-tenure track faculty
- Independent scholars
- Alternative academic
- Administrator
- Unspecified status

Documentation (5)
- Testimonials
- Qualitative studies
- Demographic data
- Experimental data
- Quantitative data

Theorizing (7)
- Content diversity
- Social dynamics/climate
- Pedagogy
- Relevance
- Identity erasure
- Perception of philosophers/philosophy
- Pre-university effect

Interventions (7)
- student recruitment and retention
- community outreach
- employment practices
- publication practices
- conference practices
- pedagogical practices
- methodological and content diversity
Appendix II: WordPress User Guide

Uploading your entries:

- All entries are to be uploaded as new posts in WordPress by using pre-formatted templates for each item type:
- On the left bar, hover your mouse over "Posts" then click "Add New Post"
  - **Note:** the posts section is really the only one you should ever need to use here
- In the new post, click the black plus sign (turns blue when hovering over) button in the upper right corner
- Add the reusable block that corresponds to your item type and your block should load onto the page
  - **Note:** this may be under "most used" or you may need to click the reusable tab then the reusable block for your item type
  - **Alternative:** in the body of the new post use the slash command to enter appropriate block (e.g., /book)

**VERY IMPORTANT**

- ****CONVERT THE BLOCK TO A REGULAR BLOCK*****
  - Click the 3 vertical dots above the block and click convert to regular block
  - If you edit the reusable block, trash your post and start again **without saving changes**
- Copy and paste information from spreadsheet into template
  - **Tip:** if at any point, pasting into WP results in weird formatting, try pasting with ctrl + shift + v instead of ctrl + v
  - Rows should be deleted if not applicable and left empty if applicable, but unknown
    - Special issue/thematic cluster can be deleted if not applicable
    - Fields such as volume, issue, ISBN, URL, google scholar link can be deleted if none are listed
    - **Note:** you will need to manually convert any links into links – highlight the text and either press ctrl + k or select add a link in the text editor (next to bold, italics, etc). Click ‘open in a new tab’
    - Open Access should get a yes or no as appropriate
    - Abstract and keywords rows should be retained and left blank if none are listed
      - Add a relevant tag to the post if either of these apply
  - Pay close attention to the style guide when entering data ensure consistency
  - The URL field is to be used for URLs that are not the DOI URLs (these should go in the DOI row)
    - Ensure that the DOI you are listing is the link version, not just the DOI
    - Usually you just need to add “doi.org/” to the beginning of the DOI to get the link, but please ensure the link works
  - All URLs will need to be manually turned into links with the option to open in a new tab selected
- On right side of post, under the post tab (you may need to click the gear icon in the upper right corner then the post tab instead of the block tab):
  - Select all relevant categories under categories
    - **Note:** you do **not** need to select the higher level category, just the specific category (e.g., if you select ‘gender’ under ‘dimensions of diversity’ then you do **not** also need to select ‘dimensions of diversity’)
  - Select the **item type** in the drop down list to indicate the primary category
  - If no dimensions of diversity or status/role is listed, please select ‘unspecified’ rather than leaving it blank
If the entry is missing an abstract and/or keywords, enter the appropriate tags ('abstract missing' and 'keywords missing'). You can add a new tag here if something else is missing or needs to be checked.

- Fill in the appropriate excerpt (templates listed below)
- Uncheck allow comments

- Publish the post in the upper right corner

Entry Style Guide:

- Authors and editors: <first name> <last name> with semicolons between multiple authors/editors
- Dates: Month day, year
- Keywords should be separated by commas
- Page numbers: full numbers (e.g. 375-385)
- Title Case for article/book titles
- URL field is for URLs that are not the DOI URLs (these go in DOI)
- Ensure that the entry for DOI is a link, not just the DOI itself (you may need to add doi.org/ to the front of the DOI to make it a functional link)
- Every entry should have one item type.
- Every entry should have at least one primary theme, at least one dimension of diversity, and at least one status/role entry, but they can have more than one.
  - Status/role and dimension of diversity may be unspecified
  - If intersectional is selected for dimension of diversity, please also include the specific identities that are intersecting in that work
  - Note: status/role refers to the group being described, not the authors of the work

Manual Excerpt Templates:

Note that you must manually insert the relevant information in the template. It will not automatically pull from the post.

*Journal/Chapter/Blog Template:*
<strong>Author Name</strong> <i>Journal/Book/Blog Name</i><br>
Publication year<br>

*Book Template:*
<strong>Author Name</strong> <br>
Publication year<br>

*Edited Volume Template:*
<strong>Editor(s) Name (eds)</strong> <i>Edited Volume Title</i><br>
Publication year<br>

*Reports Template:*
<strong>Author Name</strong> <br>
<i>Journal/Book/Institution/Society Name</i><br>
Publication year<br>
Appendix III: Email to authors/editors

Subject: EDI-Philosophy Database – please review your entries

Dear Colleagues,

Last year we created a website – *The Philosophy Exception* – that brings together over 250 publications on equity, diversity and inclusion issues in academic Philosophy: [https://www.thephilosophyexception.ca](https://www.thephilosophyexception.ca) With the help of APA Small Grants funding we are converting this static bibliography into a searchable database that includes abstracts and keywords as well as publication links.

We plan to launch this website in the next month but, before we do, we’re asking everyone identified as an author or editor of a publication in the database to review their entries for accuracy and missing information. That’s why you’re receiving this email. We’d be most grateful for any corrections or updates you can provide us by **Monday, October 3**. Please follow this link to the draft database and search on your name through “entries” page.


When launched, the new searchable database will be accessible at the same URL as the original static *Philosophy Exception* website – but for now we ask that you not circulate the link to this draft version.

In addition to bibliographic corrections, we want to be sure that those using the database can find your publications, so we’re also asking for input on the following:

- **Search terms and categories**: we’ve categorized each entry in the database on a number of different dimensions; please let us know if you think the search terms we’ve assigned to your publication(s) should be changed.
- **Missing publications**: let us know, too, about any publications or resources we’ve missed, by email or through the “new entries” button at the bottom of the landing page.
- **Abstract and/or keywords**: we would be immensely grateful if you would create an abstract and/or keywords for any work of yours that wasn’t originally published with these.

Creating abstracts and keywords is a longer-term project, one that we plan to take up after the website/database is fully launched. But we’d prefer to include ones that you draft, and we’d be happy to receive these at a later date.

Let us know if you can’t review your entry by **Monday, October 3**, and whether you intend to follow up with missing abstract/keywords. We would also welcome other feedback, positive or critical, on the design and functionality of this resource. Also, if you’d like to support this project going forward please let us know. We would be especially grateful for support expanding the scope of the database to include non-English EDI-Philosophy publications.

Thank you all so much for your advice and support!

The Philosophy Exception team: Alison Wylie, Matthew Smithdeal, Kristin Conrad Kilgallen, Jasper Heaton, Cam Gilbert, and Alice Everly

University of British Columbia