DIMENSION II:
Inclusion-centered Leadership Practices in Library Organizational Culture Module
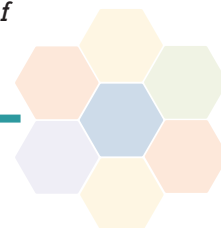
SERVING COMMUNITIES

A Framework for Inclusion-centered Library Leadership Development

Engaging Adults in Actionable Science Programs and Services that Address Community Needs

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> *"Get ready to get uncomfortable. Get ready to look at a different point of view, a different perspective. Get ready to think differently."*
>
> – a ***Serving Communities*** library director

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We are proud to acknowledge the terrific project team and advisors that helped to develop the **Serving Communities: A Framework for Inclusion-centered Library Leadership Development (Serving Communities Framework)**, the **Serving Communities: A Glossary for an Inclusive Library**, the **Serving Communities Curriculum**, and a suite of five professional development modules including: 1. Personal Inclusion-centered Leadership Practices Module; 2. Inclusion-centered Leadership Practices in Library Organizational Culture Module; 3. Inclusion-centered Practices in Building Community Partnerships Module; 4. Inclusion-centered Leadership Practices in Community Member Experiences Module: Actionable Science Information for Adult Learners; and 5. Creating a Shared Language Module: Putting the Glossary for an Inclusive Library into Action.

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"…Serving Communities Framework and Curriculum helped me focus on a path that serves the community best, [to improve services] to portions of the community that I am not already serving, that we could really expand our service and really incorporate services to underserved communities and people."

– a **Serving Communities** library director

SERVING COMMUNITIES CURRICULUM

Overview

The **Serving Communities Curriculum** seeks, for you and your library staff, to:

1. enhance state, public, and county library leadership skills and competencies to intentionally plan for and provide equitable, culturally-responsive library services and resources for all members of the community with special focus on underserved community members that are not currently using the library; and

2. foster the co-development of these services and resources in partnership with government, community leaders, and organizations dedicated to addressing community issues affecting the lives of all community members.

The **Serving Communities Curriculum,** the **Serving Communities Framework,** and the **Serving Communities: A Glossary for an Inclusive Library** are the result of a two-year program funded by the Institute of Museum and Library Services (imls.gov). Together, these materials provide library directors and leadership staff with the information they need to be actively aware and purposeful in co-creating equitable culturally-responsive library services and programs with vulnerable, underserved community member groups. A focus is on presenting actionable science information that is meaningful to adult learners in the community. (These materials are online at www.webjunction.org and www.cornerstonesofscience.org.)

Actionable Science-based Community Issues

As you consider the **Serving Communities Framework**, **Serving Communities: A Glossary for an Inclusive Library** and the **supporting modules**, all of these materials are designed to help you be actively aware and purposeful for creating equitable access to actionable science information and services responsive to community needs, particularly to underserved communities who do not or are unable to access your library. To succeed at broadening community participation, an inclusion-centered library leader needs to also broaden their skills, attitudes and practices. This includes:

1. developing a shared language with community member groups;

2. knowing your audience and understanding their reticence to the library and their distrust of "science;" and

3. even within the library's financial and staff constraints, through partnerships, willingness and interest, prioritizing equitable access to actionable science information and services that are relevant and needed by community member groups.

> *"The **Framework** is a self-assessment tool. You are able to determine where you are and chart a path for personal improvements."*
> – a **Serving Communities** library director

Serving Communities Framework for Library Directors

The **Serving Communities Framework** for library directors is a resource for state, public, and county library directors and leadership staff. It supports your work to:

1. determine your current inclusion-centered attitudes and practices;

2. visualize your aspirations for yourselves (as inclusion-centered leaders), your library, and your community; and

3. develop your path forward for creating a more inclusion-centered library.

The **Serving Communities Framework** identifies the skills and competencies that library directors need to create a library that is responsive to community well-being (especially for people that are underserved). Library leaders need to be confident and have the skills to build a coalition of community members that is able to co-create actionable science-based programs and services for adult learners that are relevant and needed by them.

Supporting the **Serving Communities Framework** are five modules designed to enhanced your inclusion-centered skills, attitudes, and practices. They include:

Module 1: Personal Inclusion-centered Leadership Practices Module

Module 2: Inclusion-centered Leadership Practices in Library Organizational Culture Module

Module 3: Inclusion-centered Leadership Practices in Building Community Partnerships Module

Module 4: Inclusion-centered Leadership Practices in Community Member Experiences Module: Actionable Science Information for Adult Learners

Module 5: Creating a Shared Language Module: Putting the Glossary for an Inclusive Library into Action

SERVING COMMUNITIES
A FRAMEWORK FOR INCLUSION-CENTERED LIBRARY LEADERSHIP DEVELOPMENT

AWARE

DEMONSTRATING

INTENTIONAL

Engaging Adults In Actionable Science Programs and Services that Address Community Needs

**Dimension I:
Personal Inclusion-centered Leadership Practices**
COMPETENCIES
1 Values diversity, equity, inclusion, and access
2 Marginalized groups contribute to library leadership and decisions
3 Uses sphere of influence to advocate for and advance co-development of library services with marginalized groups

**Dimension II:
Inclusion-centered Leadership Practices in Library Organizational Culture**
COMPETENCIES
1 Prioritize an inclusive, equitable and accessible library culture
2 Sustain library operational alignment with diverse community member wants and needs
3 Establish community feedback loops for sustaining access to equitable science-based programs and services

**Dimension III:
Inclusion-centered Leadership Practices in Building Community Partnerships**
COMPETENCIES
1 Invest in local gov't partnerships to address science-based issues affecting marginalized groups and community well-being
2 Create evidence-based metrics with DEIA community to address equity, inclusion, and access
3 Build broad-based coalition of community partners in co-creation of science-based programs and services

**Dimension IV:
Inclusion-centered Leadership Practices in Community Member Experiences**
COMPETENCIES
1 Involve community members in sustaining inclusive library programs, policies and services
2 Build long-term relationships with diverse communities
3 Build a sustained broad-based coalition to create and operationalize programs and services to address Science-based community issues

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INTRODUCTION

"It is often said, that libraries operate in financial, space, and staff constraints and therefore can only do so much. The real question is, even within those constraints, 'How can I re-prioritize my operational decision-making, using those same resources, to attain a new level of equity, inclusion, and access?'"

— Cynthia Randall, Executive Director, Cornerstones of Science, for ***Serving Communities***

Using the Inclusion-centered Leadership Practices in Library Organizational Culture Module

The Serving Communities Inclusion-centered Leadership Practices in Library Organizational Culture Module is all about "Getting Your Library House In Order." This module is based on *Dimension II* of the *Serving Communities Framework,* and is designed for library directors, management and staff interested in creating equitable, inclusive, accessible and welcoming library spaces, services and programs for all community members. As a director, the vision and operational decision-making as it relates to your library's staffing, budget, space usage, and policies, all outwardly communicate your inclusion-centered library's values. How inclusion-centered is your library? *Dimension II* of the *Serving Communities Framework: Inclusion-centered Leadership Practices in Library Organizational Culture Module* can be found on **pages 8-10**, and is a tool for the activities highlighted in this module.

"Inclusive library services are holistic, spanning library policies, collections, space, and services. Inclusive services reflect equity and accessibility for all members of the community."

— The Inclusive Services Assessment and Guide for Wisconsin Public Libraries

The *Serving Communities Inclusion-centered Leadership Practices in Library Organizational Culture Module* focuses on three critical themes and activities designed to help you discover, reflect and act upon:
1. taking a deeper dive into the policies of your library organization to identify current inclusion-centered policies that are being promoted and how they might be perceived by diverse ethnic and cultural community groups in your service area;
2. determining what value statement your library is projecting through your budget priorities; and,
3. identifying and planning for one inclusion-centered operational goal that helps you begin to get your library house in order to become a welcoming, accessible gathering place for all community members.

THEME 1
Library Priorities Demonstrate Your Values on Equity and Inclusion

Libraries are human institutions and like all human institutions, libraries have bias built into them. Some of this bias will be readily apparent to you and your staff, and some might be less visible. The *Policy Inventory and Assessment of Your Library Worksheet* is designed for you and your staff to inventory and assess your policies to determine:
1. who [target audience] they are really serving;
2. if they are a barrier to some community member groups;
3. if your policies are implemented in the same way they are publicly communicated; and,
4. to what extent your library has a "Bill of Rights" that ensures that every individual will feel truly welcomed, included, and able to freely communicate the views of their community.

THEME 2
Your Budget is Part of Your Library's Inclusion-centered Values Statement

Did you know that your library's budget is an outward expression of your library's inclusion-centered priorities, mission, and values? What a public library does is driven by its budget. Your budget takes center stage as part of the solution to addressing inequities. The *Assessing Inclusion-centered Level of Your Library's Budget Worksheet* is designed to help you rethink, be more intentional and purposeful about the budgeting process, understand the tensions, benefits, and burdens on communities that you serve, and aid in your library's ability to succeed.

THEME 3
Library Goal-setting and Action Planning for an Inclusion-centered Library

Goals are a concrete way to drive results, and without an explicit equity and inclusion component, goals won't produce better outcomes for serving underserved

communities, addressing disparities, or supporting belonging. Identifying one intentional inclusion-centered goal for your library, no matter how small, will speak volumes to your staff, partners, the community members you serve and those you currently do not serve. The *Inclusion-centered Goal-setting and Action Planning for Your Library Worksheet* is a template designed to help you to develop one inclusion-centered library goal and create an intentional **S.M.A.R.T.I.E (Strategic, Measurable, Ambitious, Realistic, Time-bound, Inclusive, and Equitable)** step-by-step action plan for achieving it.

Ask yourself these questions: How can you use these resources to promote inclusion and enhance access? How could you shift resources to draw in a wider user base? Furthermore, how can you engage the community in figuring out how to allocate resources to draw in more users? This module will help you explore these questions in the context of your library.

The discussion of each theme also includes possible *"Action Remedies"* and *"Worksheets"* that give you the opportunity to review your existing library policies and procedures as possible levers for change. The Worksheets, associated with each of the three Themes, provides a closer look at each of the three themes (priorities, budget, goal setting). What will you be exploring with each worksheet?

WORKSHEET 1
Policy Inventory and Assessment of Your Library
provides a way to assess how inclusion-centered your current policies are. In addition, actionable science policies have also been added, for you to explore ways the library organizational culture, its services and programs can further support adult learners and community resilience.

WORKSHEET 2
Assessing the Inclusion-centered Level of Your Library's Budget
is designed for you to review your current budget with equity and inclusion in mind. In reviewing your budgetary policies, you will discover what your budget is communicating to your staff and community. What is your budget saying?

WORKSHEET 3
Setting an Inclusion-centered Library Goal and Action Plan
is an exercise in inclusion-centered goal setting where you will incorporate all of your answers from the worksheets within a S.M.A.R.T.I.E. (Strategic, Measurable, Achievable, Realistic, Time-bound, Inclusive and Equitable). This method is used to identify the investments and budget allocations required to reconfigure and achieve your goal or outcome if they are revised, implemented differently, or acted upon more consistently.

Limited Time
A common refrain by library directors is that there is a limited time to explore these issues due to the many internal and external demands and constraints they face each day. However, not investing time on issues of equity and inclusion, at both the individual and organizational level, is contrary to the mission and values of public libraries. If you only have time to focus on one theme within the *Dimension II: Inclusion-centered Leadership Practices in Library Organizational Culture Module*, we recommend that you:

1. Review the *Serving Communities Framework — Dimension II* table on the next three pages, and explore the competencies and indicators that can help you determine how inclusion-centered some of your library operations currently are.

2. Review and complete *Worksheet 1: Policy Inventory and Assessment of Your Library* on **pages 13-24**. Enhancing your policies to be more equitable and inclusive is a great first step toward making your library inclusive and welcoming to all in your community.

> *"Inclusion-centered leadership requires intentional internal organization practices that result in the delivery of library programs and services to all members of a community. Library leadership integrates their lived experiences and sphere of influence to make operational decisions that produce equitable access to library resources for all."*

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DIMENSION II

Inclusion-centered Leadership Practices in Library Organizational Culture Module

FOCUS: Combined internal and external factors, pressures and demands (**Internal**, such as existing organizational culture, financial, and resource constraints, staff, library boards, library friends groups, existing strategic and operational plans, and **External**, such as patrons, competing community demands and tensions, limited partner engagement) that affect a library director's decisions and abilities to create an equitable, inclusive, outwardly-engaged library culture, policies, programs, and services focused on adult populations not using/unable to access the library.

"Smart teams will do amazing things, but truly diverse teams will do impossible things." — Claudia Brind-Woody

Dimension II, Competency 1
PRIORITIZE AN INCLUSIVE, EQUITABLE, AND ACCESSIBLE LIBRARY CULTURE

1.

AWARE		INTENTIONAL		DEMONSTRATING	
Library Leader Attitudes & Practices	Indicators	Library Leader Attitudes & Practices	Indicators	Library Leader Attitudes & Practices	Indicators
1. **Recognize** the need to develop library-wide, inclusion-centered shared values, priorities, and language.	• *Are aware of the need to evaluate* current understanding of diversity, equity, and inclusion among management and staff. • *Are aware of the need to plan* to develop an inclusive, equitable library culture and increase internal capacity to pursue equity goals. • *Are committed* to determining whether library policies are in alignment with current DEIA attitudes and practices within your community. • *Regular community analyses and library use studies* are conducted to understand which communities are not served (e.g., circulation, community data, feedback and input on current barriers and policies to who has access to library services).	**1.** **Create** an equitable and diverse library culture.	• *There is a plan for developing an inclusive, equitable library culture* and increasing internal capacity for equity and diversity. • *Attend community events and cultural hotspots* to actively listen and begin to engage with diverse cultural/ethnic groups in the community. • *Commit to increasing diversity in the organization* and the number of diverse communities who are served. • *There is a co-created plan to document your library's progress* toward inclusion and equity.	**1.** **Commu-nicate** in creating and prioritizing an inclusive, equitable, and diverse library culture.	• *There is dedicated time and resources for staff professional development* and growth opportunities related to sustaining an equitable and diverse library culture. • *Library staff and community members engage in difficult conversations* regarding breaking down structural issues of inequity and lack of access.

1 ——→ 2 ——→ 3 ——→ 4 ——→ 5 ——→ 6 —→7 ——→ 8 ——→ 9

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"Change your budgeting from funding line items to purchasing results by giving departments clear expectations and instructions to guide their budget proposals."

— Shayne C Kavanaugh, Andrew Kleine, Chris Fabian and Erik Fabian, Budgeting for Equity: Tensions, Lessons, Steps for Success

Dimension II, Competency 2
SUSTAIN LIBRARY OPERATIONAL ALIGNMENT WITH DIVERSE COMMUNITY MEMBER WANTS AND NEEDS

2.	AWARE		INTENTIONAL		DEMONSTRATING	
	Library Leader Attitudes & Practices	**Indicators**	**Library Leader Attitudes & Practices**	**Indicators**	**Library Leader Attitudes & Practices**	**Indicators**
	2. Recognize the potential for aligning the library with community needs.	• *Are aware of the need to work with* community partners to determine community needs. • *Are aware of the need to assess* current library capacity to meet community needs (e.g., space, collections, programs). • *Are aware of the current library use patterns* to determine whether space, collections, and programs are used by all groups who live in the community, and what level of access those groups have to library resources. • *Are aware of the importance of providing services* to meet currently unmet community needs.	**2. Create** a plan for increasing library alignment with community needs	• *Community partners and members identify community needs* and potentially effective practices to meet those needs. • *Library policies, procedures, practices, and capacity is analyzed* relative to community needs, recognizes root causes of disparities in library service, and plans to overcome those disparities. • *Implements changes* to library policies, procedures, practices, and capacity to align library with community needs.	**2. Partner** in aligning the library with community needs.	• *Time and resources are dedicated to creating and sustaining* practices that align the library to community needs. • *Policies, procedures, and practices* reflect the library's inclusion and equity plan. • *There is an operational plan, benchmarks, and evaluation plan* to demonstrate how the library's efforts are impacting the community and improving equity and access. • *Community partners and members identify changing community needs* and are part of continuous alignment of library practices to meet those needs.

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> *"…I have given a copy of the **Framework** to our programming and services group who now is reviewing all programs for intentionality and ability to reach vulnerable groups in our community."*
>
> – a *Serving Communities* library director

Dimension II, Competency 3
ESTABLISH COMMUNITY FEEDBACK LOOPS FOR SUSTAINING ACCESS TO EQUITABLE SCIENCE-BASED PROGRAMS AND SERVICES

3.	AWARE		INTENTIONAL		DEMONSTRATING	
	Library Leader Attitudes & Practices	Indicators	Library Leader Attitudes & Practices	Indicators	Library Leader Attitudes & Practices	Indicators
	3. Recognize the importance of community members' perspectives on science-based community issues.	• *Are aware of the importance of engaging* with community members regarding science-based community issues and understand how to engage with all members of the community. • *Are aware of the need to review* current community initiatives regarding science-based community issues and how those affect the cultural, ethnic, and socioeconomic groups in the community. • *Are aware of the need to assess* the library's resources and capacity for addressing science-based community issues, identify immediate action steps, and those that need additional support.	**3. Create** a plan to address science-based community issues in conjunction with diverse community members.	• *There is a broad coalition* to address science-based community issues, including local government and community groups. • *Community organizations are consulted* in creating a plan to evaluate the effectiveness of current community-based science initiatives, barriers to community participation, missed opportunities, and potential partners and solutions. • *There are resources and investments* addressing science-based community issues, including creation and use of media, research, and evaluation to increase services.	**3. Align** library services to address science-based community issues.	• *Participation in coalition of community partners* to identify important science-based community issues impacting underserved community members. Use of DEIA, operational, and community assessment tools to document the impact on underserved populations within the community and ways to increase their use of library programs and resources. • *Community-based feedback loops help document* race bias, and lack of diversity and inclusion in science-based community issues and inform library planning.

1 ———→ 2 ———→ 3 ——→ 4 ——————→ 5 —————→ 6 →7 ————→ 8 ——————→ 9

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> "*It's just kind of looking at things more critically, instead of just that we have to get this done. We have to be thinking, thinking strategically, we have to be thinking differently, and making sure that we're doing what we need to, and that everything that we're doing is for the benefit of the community and not necessarily for the benefit of the staff. We have to make sure that if we're making changes, that's going to really help our community.*"
>
> — a **Serving Communities** library director

Inclusion-centered Leadership Practices in Library Organizational Culture Module

THEMES and WORKSHEETS

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THEME 1
Library Priorities Demonstrate Your Values on Equity and Inclusion

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"Inclusive library services are holistic, spanning library policies, collections, space and services. Inclusive services reflect equity and accessibility for all members of the community."
— The Inclusive Services Assessment and Guide for Wisconsin Public Libraries

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Libraries are human institutions, and like all human institutions, libraries have bias built into them. Some of this bias will be readily apparent to you, and some of it might be less visible. To mitigate this challenge, two core inclusion-centered documents that all libraries should consider creating, reviewing and/or revising are:
1. A Bill of Rights for Your Library and,
2. Assessment of Your Inclusion-centered Policies.

Action Remedies
Create A Bill of Rights for Your Library
Many libraries have a Bill of Rights. This is an excellent way to encapsulate and effectively communicate to your community your library's inclusion-centered policies and values. If you have not written a Library Bill of Rights, the American Library Association https://www.ala.org/advocacy/intfreedom/librarybill/interpretations/EDI has a helpful overview of the wording and types of information that should be included in your Library's Bill of Rights.

"To ensure that every individual will feel truly welcomed and included, library staff and administrators should reflect the origins, age, background, and views of their community. Governing bodies should also reflect the community. Library spaces, programs, and collections should accommodate the needs of every user."
— American Library Association (April 2017)

Conducting an Assessment of Your Library's Inclusion-centered Policies
There are a number of useful examples of inclusion-centered library policies (created by other libraries) that you can use as a guide for your reassessing your library's policies. As an inclusion-centered leader, it will be important to gather multiple perspectives when considering the policies that most affect equity, inclusion, and access, particularly by underserved community groups. Groups include talking with your
1. government agencies,
2. library boards and friends groups,
3. staff, and
4. the community at large, particularly those groups not using the library.
Whether your library is small or large, urban, suburban or rural, *The Inclusive Services Assessment and Guide for Wisconsin Public Libraries* provides a framework and outline to help you get started.

The Serving Communities Library Policy Inventory and Assessment Worksheet #1 is a tool focused on helping you reassess your library policies in light of prioritizing accessibility and inclusion.

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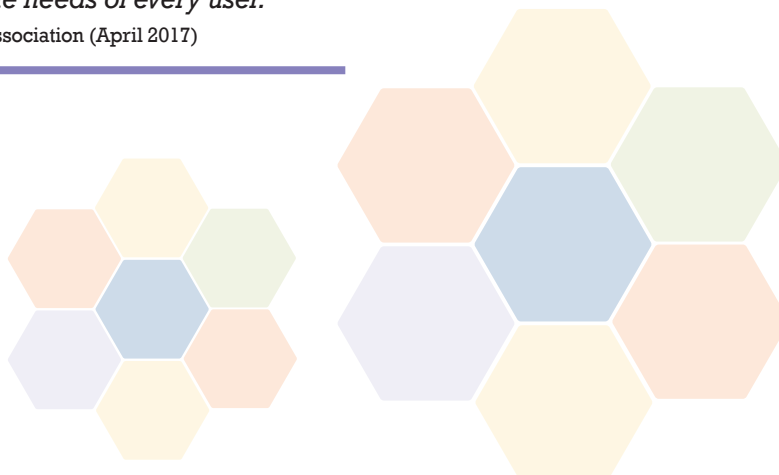
WORKSHEET 1

Policy Inventory and Assessment of Your Library

Objectives

• To determine the level of equity, inclusion and access by community members, particularly underserved community groups
• To understand what is really being communicated to staff and the community around the library's values and mission to serve all members of the community
• To identify, utilize, and revise existing library policies to create a more inclusive institution for the community
• To reflect upon and ensure that your library's policies and procedures demonstrate and support your library's values of equity and inclusion
• To give you familiarity with a tool that you can use to provide insight into areas of your operation that can assist you in planning, staff development, budgeting, and leadership

What You Need

• A way to refer to and check your library's policies
• A copy of the *Serving Communities Equity Library Framework for Library Directors*
• A copy of the *Wisconsin Inclusive Services Assessment and Guide*
• If possible, a small advisory group of 3-5 individuals representing different perspectives. These could include people from:
    1. government agencies;
    2. library boards and friends groups;
    3. staff; and,
    4. the community at large, particularly those groups not using the library.
• A place where you do your best thinking with few interruptions

Time

2-3 hours

Instructions

1. Review your library's policies to get reacquainted with them and to get a general picture of
    a) what your policies are,
    b) who they are serving and not serving,
    c) how and where your library's policies are being communicated internally and externally,
    d) the current level of equity, inclusion and access, and
    e) what the process is for reviewing and changing your library policies.

2. Use the *Serving Communities Library Policy Inventory and Assessment Worksheet* to assess the current policy environment of your library. The *Serving Communities*

Library Policy Inventory and Assessment Worksheet is a modified version of *The Inclusive Services Assessment and Guide for Wisconsin Public Libraries*[1] and is comprised of a series of 8 Policy Checklists. Each Policy Checklist represented in this worksheet aligns with one of the *Serving Communities Equity Library Framework Dimensions*
    1. Personal Inclusion-centered Leadership Practices Module,
    2. Leadership Practices in Library Organizational Culture Module,
    3. Inclusion-centered Leadership Practices in Building Community Partnerships Module, and
    4. Inclusion-centered Leadership Practices in Community Member Experiences Module.
In addition, we have added an assessment around culturally-responsive, actionable science information for adults.

3. Review the *Serving Communities Library Policy Inventory and Assessment* Policy Checklists on **pages 14–24** and circle the status of each policy. The status levels are:
    Yes ("Y") — This response indicates that the library is currently executing the checklist statement. Example — *"Yes: the library displays pictograms at the entrances of the restrooms."*

    No ("N") — This response indicates that the library is NOT currently executing the checklist statement. Example — *"No: the library does not display pictograms at the entrances of the restrooms."*

    In Progress ("IP") — This response indicates that the library is currently developing the checklist statement. Example — *"In Progress: the library is in the process of installing pictograms at the entrances of the restrooms."*

    NA ("Not Applicable") — This response indicates that the checklist statement is factually irrelevant to the library. Example — *"Not Applicable: The library does not have public restrooms because it is a bookmobile."*

    Place an "X" in each row of the Policy Checklists that best describes your library's current policy status level.

4. Score each of your responses.
    "Y" = 1 point
    "N" = –1 point
    "IP" = .5 point
    "NA" = 0 points

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[1]*Inclusive Services Assessment and Guide*, created by Wisconsin public library directors, staff and boards, was designed with the intent to foster inclusive library environments where everyone is safe, welcomed, and respected. They stated that "Inclusion is not a one-size fits-all concept, nor a complete-and-move-on challenge. Ultimately, changes and improvements depend on the leadership of library administration." *The Wisconsin Inclusive Services Assessment and Guide* is meant to be a self-evaluation tool designed to assist the library director in better understanding how it considers inclusion as an institution — an integral part of the library's daily operations.

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Serving Communities Library Policy Inventory and Assessment

ADMINISTRATION

Policy Checklist 1
Personal Inclusion-centered Leadership Practices

Leadership (from DIMENSION I)

1. Does the library director (or representative) actively engage with underserved community groups through dialogues and/or co-development of services and programs?	Y	N	IP	NA
2. Does the library director (or representative) attend community meetings focused on the needs of underserved and vulnerable members of the community?	Y	N	IP	NA
3. Does the library director and department heads (if any) have awareness of community member groups who live in the library service area and understand their strengths and the issues affecting them?	Y	N	IP	NA
4. Does the library director articulate a library vision/mission centered in inclusion and support professional development opportunities for self and staff around this mission?	Y	N	IP	NA
5. Does the library director (or representative) report back to underserved community groups on how their feedback has been used to broaden the vision and direction of their library?	Y	N	IP	NA
6. Does the library director (or representative) review inequities and use their power to reduce or eliminate individual, institutional, and/or structural bias?	Y	N	IP	NA
Questions Specific to Actionable Science Policies				
7. Does the library director (or representative) leverage their spheres of influence to advocate for the co-development of initiatives, with local government and community partners, to support sustained access and support of actionable science information services and resources by and for underserved community groups?	Y	N	IP	NA
8. Does the library director (or representative) actively seek guidance and advice from underserved community groups so that they can contribute to the library's vision, and express their wants and needs regarding actionable science information?	Y	N	IP	NA
Total				

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Governance (from DIMENSION II)

1. Does the library board reflect the demographics of the entire community?	Y	N	IP	NA
2. Has the library director invited staff, board, friends group, as well as organizations and members that reflect the community, to collaborate on the library's Bill of Rights?	Y	N	IP	NA
3. Do the bylaws or mission statement have language on equity and inclusion being foundational to the purpose of the library?	Y	N	IP	NA
4. Are there policies that have language on equity and inclusion as being foundational to the purpose of the library?	Y	N	IP	NA
5. Do written procedures include the library's primary commitment and operational strategies to support equitable services to all users?	Y	N	IP	NA
6. Does the library regularly review all policies to determine if they are creating unnecessary barriers?	Y	N	IP	NA
7. Are policies regularly reviewed and updated to reflect the actual needs of underserved groups wanting and needing library services?	Y	N	IP	NA
8. Are the policies accessible to all community members, including languages used and ability?	Y	N	IP	NA
9. Do the policies refer to users in a respectful, gender neutral, culturally responsive and, unbiased way?	Y	N	IP	NA
10. Upon hire, are there opportunities for the new director and/or management to meet members of the community not just at the library, but through invitations to events or places of the community's choosing (e.g., community center, PrideFest celebration, a Hindi service, the local Irish cultural center, etc.)	Y	N	IP	NA
11. When the library board develops its strategic plan, are community members from underserved groups invited to participate?	Y	N	IP	NA

Questions Specific to Actionable Science Policies

12. Does the library director's annual review ask if they know what issues (e.g., actionable science, like public health) are affecting community members?	Y	N	IP	NA
13. Are inclusion-centered goals and objectives to meet community needs included in the strategic plan, including broadening participation, access, and connection to relevant, meaningful actionable science information, services for populations in greatest need?	Y	N	IP	NA
Total				

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LIBRARY STAFF, FUNDING, COLLECTIONS, AND SPACE

Policy Checklist 2
Inclusion-centered Leadership Practices in Library Organizational Culture

Staffing (from DIMENSION II)

1. Are all library staff able to explain inclusion-centered library policies to the public?	Y	N	IP	NA
2. Do library staff assist in inclusion-centered library planning efforts?	Y	N	IP	NA
3. Do library staff project an image of unbiased competence, courtesy and inclusion?	Y	N	IP	NA
4. Do library staff actively engage with a variety of community groups, particularly those from underserved communities?	Y	N	IP	NA
5. Are library staff aware of professional development opportunities in relation to inclusion-centered practices and services?	Y	N	IP	NA
6. Do library staff participate in the planning of inclusion-centered services at the county and system level?	Y	N	IP	NA
7. Do community members (who do not have library degrees), from underserved groups serve as volunteers and/or paid staff at the library?	Y	N	IP	NA
8. Are inclusion-centered services part of the technology plan?	Y	N	IP	NA
Questions Specific to Actionable Science Policies				
9. Are library staff aware of professional development opportunities in relation to inclusion-centered actionable science practices and services?	Y	N	IP	NA
10. Do library staff participate in their library system's inclusion-centered programming for underserved families, youth and adults, particularly around actionable science information?	Y	N	IP	NA
Total				

Collections (from DIMENSION II)

1. Does the collection development policy have a statement about inclusion?	Y	N	IP	NA
2. Are the library board and staff aware of the non-inclusive aspects of library classification systems and controlled vocabulary (e.g., the weight given to Christianity in Dewey Decimal Classification, or awareness of Homosaurus https://homosaurus.org/ focused on LGBTQ+ vocabulary in Library of Congress designations)?	Y	N	IP	NA
3. Does the collection accurately reflect the community's tastes, beliefs or attitudes from the input and/or feedback from underserved groups?	Y	N	IP	NA
4. Does library staff use a plan with identified steps for the involvement, co-development of services and programs with underserved groups?	Y	N	IP	NA
5. Does the collection include authors, storylines and/or characters by and from a range of groups (e.g., racial, ethnic, gender identity, sexuality, disability, veteran status, education level, etc)?	Y	N	IP	NA
6. Does the collection include accurate, respectful, and current information by and about different groups, characters in a storyline, or settings and contexts (e.g. racial, ethnic, gender identity, sexuality, disability, veteran status, education level, etc)?	Y	N	IP	NA
7. Is the collection accessible to people with sensory, ambulatory, social, emotional and intellectual differences who may be unable and/or not willing to go to the library?	Y	N	IP	NA
8. Does the collection contain items in languages other than English?	Y	N	IP	NA
9. Do library displays regularly include materials by and about people of various dimensions of identity and/or diverse ethnic groups of people?	Y	N	IP	NA
Questions Specific to Actionable Science Policies				
10. Does library staff use a plan with identified steps for the involvement, co-development of actionable science services and programs with underserved groups?				
11. Do library displays regularly include actionable science materials by and about people of various dimensions of identity and/or diverse ethnic groups of people?				
Total				

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Facility — Indoor Spaces (from DIMENSION II)

1. Does the library use programs, literature, and publicity in creative ways and in a variety of settings to attract underserved groups?	Y	N	IP	NA
2. Does library staff respectfully ask users how they would like to be referred to, if appropriate, when assisting them or seeking information for them?	Y	N	IP	NA
3. Does the library create pathfinders, subject guides and read's advisory bookmarks related to topics of interest to a variety of communities (e.g., LGBTQ+, neurodiverse, ethnic and cultural groups, etc)?	Y	N	IP	NA
4. Does the library offer discreet information, such as shortcuts to local services on computer desktops about potentially sensitive topics, such as public health information for Muslim women, that are relevant to the variety of community groups?	Y	N	IP	NA
5. Does the library provide accessible schedules of library events?	Y	N	IP	NA
6. Are programs and materials presented in both English and other prevailing languages within the community?	Y	N	IP	NA

Questions Specific to Actionable Science Policies

7. Does the library have a feedback mechanism to provide insight on the needs of specific services populations (e.g., ex-officio member of the library board representing the ethnic and cultural groups, adult learner advisory board focused on culturally relevant actionable science community issues they want and need)?	Y	N	IP	NA
8. Does the library help non-English speaking community members understand and interact with relevant actionable science community information the need and want, like public health, social services local, state government agencies and community organizations offer?	Y	N	IP	NA
9. Is there information on actionable science community issues and information literacy available to all communities in the library service areas?	Y	N	IP	NA
10. Do community groups have the opportunity to help co-develop actionable science programs that adults want and need?	Y	N	IP	NA
Total				

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Inclusive Culture at the Library (from DIMENSION II)

1. Do library staff have an understanding of how to operationalize inclusivity?	Y	N	IP	NA
2. Do library staff administration have conversations with staff about being an inclusive library?	Y	N	IP	NA
3. Are staff members trained to serve all members of the community, particularly those that are marginalized, vulnerable?	Y	N	IP	NA
4. Do staff adhere to core values of creating an inclusive environment at their library?	Y	N	IP	NA
5. Are staff empowered to put the user first?	Y	N	IP	NA
6. Is there a teamwork mentality in creating an inclusive environment at the library?	Y	N	IP	NA
7. Is there an atmosphere of respect among staff members and members of the community?	Y	N	IP	NA
8. Do staff make thoughtful decisions in dealing with users and members of the community as part of their daily work routine?	Y	N	IP	NA
9. Is there a measurement in place to track outcomes regarding community engagement and relationship building in their community?	Y	N	IP	NA
Total				

INCLUSION-CENTERED LEADERSHIP PRACTICES IN BUILDING COMMUNITY PARTNERSHIPS

Policy Checklist 3
Building Community Partnerships

(from DIMENSION III)

	Y	N	IP	NA
1. Does the library have a programming policy that also includes a diversity or inclusivity statement?	Y	N	IP	NA
2. Does the library offer programming at different times of day and various days of the week, including nights and weekends?	Y	N	IP	NA
3. Are efforts made to make library programs accessible in languages other English (e.g. movies with subtitles, Spanish/English versions of the same program, etc)?	Y	N	IP	NA
4. Are people able to participate in library programming whether or not they have a library card?	Y	N	IP	NA
5. Does the library include an inclusivity statement on promotional materials?	Y	N	IP	NA
6. Does the library include a variety of community members in the development of programs?	Y	N	IP	NA
7. Are there multiple avenues available for diverse program attendees to provide feedback, particularly around themes they want, need and are most interested in?	Y	N	IP	NA
8. Does the library offer programming targeting multiple dimensions of personal identity, including: race, ethnicity, age, citizenship, literacy levels, ability, family structure, income level, health status, gender identity, sexuality, style of dress, familiarity with public libraries?	Y	N	IP	NA
9. Does the library contract with performers, authors, and presenters who reflect multiple dimensions of personal identity, cultural and ethnic groups?	Y	N	IP	NA
10. Does the library regularly evaluate programming practices to determine if individuals or groups are potentially excluded (e.g., excluding adults with cognitive disability on the basis of age from sensory story times targeting children)?	Y	N	IP	NA
11. Does the library offer programs that celebrate a wide variety of heritages and cultural events?	Y	N	IP	NA
Questions Specific to Actionable Science Policies				
12. Does the library plan programs that are based on community needs and interests, particularly actionable science information and services for adult learners?	Y	N	IP	NA
13. Does the library collaborate with established community organizations when planning and promoting programs, particularly actionable science themes (e.g., public health, water and air quality, etc)?	Y	N	IP	NA
Total				

COMMUNITY ENGAGEMENT OF UNDERSERVED GROUPS

Policy Checklist 4
Inclusion-centered Leadership Practices in Community Member Experiences

(from DIMENSION IV)

1. Does the library regularly analyze the demographics of the community in which it is located?	Y	N	IP	NA
2. Does the library involve users, residents, local businesses, and other key organizations and interested parties when preparing the strategic plan?	Y	N	IP	NA
3. Has the library identified the needs and issues of specific groups in the community?	Y	N	IP	NA
4. Does the library have multiple formats for receiving feedback from a variety of community groups concerning potential barriers?	Y	N	IP	NA
5. Is the library responsive to the feedback from groups and individuals in underserved communities?	Y	N	IP	NA
6. Does the library work with community ambassadors to help promote the library as well as their community's goals, wants and needs?	Y	N	IP	NA
7. Does the library have meaningful engagement and collaboration with neighborhoods, local organizations, schools and businesses, with a set of shared priorities for the library and community?	Y	N	IP	NA
8. Does the library collaborate with other institutions to ensure library service for people who have difficulty visiting the library (e.g., migrant workers, senior housing, neighborhoods not connected with the library, community centers, etc)?	Y	N	IP	NA
9. Does the library offer resource for people who are transient (e.g., migrant workers, homeless, etc)?	Y	N	IP	NA
Questions Specific to Actionable Science Policies				
10. Does the library work with community organizations to facilitate reciprocal sharing of actionable science information about programs, collections/materials and resources to all community members (e.g. public health, water quality, social services, NAMI, etc)?	Y	N	IP	NA
11. Does the library collaborate with other institutions to ensure library actionable science information programs and services for people who have difficulty visiting the library (e.g., migrant workers, senior housing, neighborhoods not connected with the library, community centers, etc)?	Y	N	IP	NA
12. Does the library send staff to represent the library at meetings and events held by the various organizations in the community (e.g. health and human services coalitions, government strategic initiative planning meetings, etc)?	Y	N	IP	NA
Total				

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Strengthening Your Practices and Policies

Add up the total Yes(es) and No(s). The total points will give you a quick understanding of how inclusive your library's policies are as well as help identify areas of library operation that might require additional input and resources. Are you happy with where you stand?

Totals	Y	N	IP	NA
Inclusion-centered Policy Checklist Totals				
Actionable Science Checklist Totals				

Review your responses to the Policy Checklists. Answer the questions highlighted in the *Strengthening Your Practices and Policies* questionnaire on **page 23** to explore possible factors influencing your practices and policies as well as ways you can strengthen them to be more inclusive and science actionable.

Strengthening Your Practices and Policies

1. What are the policies you wish to change/strengthen/enforce?

_____

_____

_____

2. What is one thing that you want these policies to accomplish? For/with whom?

_____

_____

_____

3. What makes you believe these policies will accomplish this (i.e., what are your assumptions about why this will work)?

_____

_____

_____

4. What is one activity/strategy that is representative of this policy?

_____

_____

_____

5. What are two things you want to know about this activity, strategy, or policy?

_____

_____

_____

6. If you were writing your ideal annual report, how would you write about this initiative's success? Use key words and short phrases.

_____

_____

_____

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Decide

You probably have identified several actions for improving your library's policies, procedures, and the application of those policies to make your library more inclusive for all your users.

1. Identify **one** inclusion-centered actionable science policy that could greatly improve achieving your goal or outcome if it were revised, implemented differently, or acted upon more consistently. Example: *The library could plan a program based on community needs and interests, particularly actionable science information and services for adult learners, and the library needs to provide staff with more professional development opportunities specifically related to inclusion-centered actionable science practices and services.*

Act

Plan out an action for improving the inclusion-centered actionable science policy you identified, such as:
Action 1: Provide new language for the policy that needs to change.
Action 2: Review that language with your staff and those groups directly impacted by the policy.
Action 3: Discuss, if any, what training and support changes are needed to implement this change.
**Action 4:** Itemize the education chain for implementing that new policy or procedure (e.g., department heads, public and technical services, front lines).
Action 5: Present the new policy to your staff and those groups most directly impacted, explaining why the change is being made and what training and policy resources are available to support the change.
Action 6: Change the policy on the web and in written documentation.
Action 7: Enforce the new policy.

Inclusion-centered Goal or Outcome		
Policy	Improve or enhance policy to be more inclusive	What are the intended/unintended consequences for your library, users, and community members?
Inclusion-centered actionable science policy		

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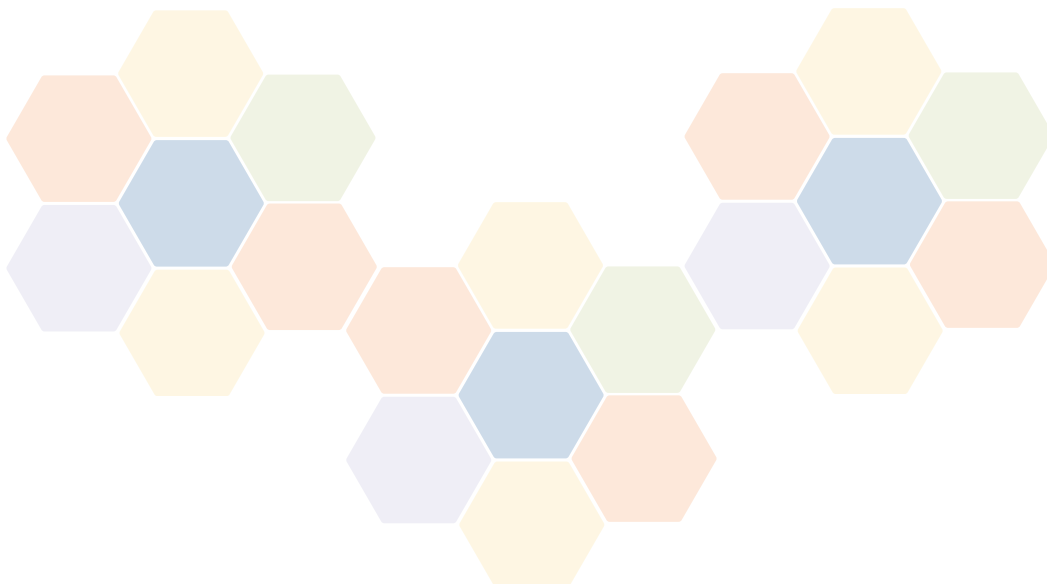
THEME 2
Library Priorities: Your Budget as Part of Your Library's Inclusion-centered Values Statement

Your budget is your values statement.

Your library's budget is an outward expression of your library's priorities, mission and values. What is your budget communicating to the diverse community member groups who serve or currently do not serve?

Public libraries have long relied on incremental, line-item budgeting where last year's budget becomes next year's budget with changes around the margin. The primary disadvantage is that it causes public libraries to be slow to adapt to changing conditions of the community, and slow to support the re-thinking of library programs and services to reach a broader and more diverse population.

Tensions in Budgeting for Equity

What a public library does is driven by its budget. To be part of the solution to address inequities, the budget must take center stage. Budgeting is inherently political and concerns how limited resources will be allocated. If resources are going to be used differently in the future, there is a risk that people who are used to the current levels of services will object to. Those who are comfortable with the current allocation of resources may also have advantageous relationships, connections and power dynamics to maintain those resources.

Four tensions in budgeting for equity are:
1. **Equality of opportunities versus equality of outcomes.** Perceptions of fairness are essential to any decision-making process.
2. **Symbols versus substance.** Budgeting for equity is a concept and symbols are necessary to get people on board with the concept. But substance is required to make a difference in the lives of community members.
3. **Breadth versus depth.** An equity lens could be applied across the entire budget, but this risks a shallow analysis that doesn't make a meaningful change in how resources are used. Alternatively, focusing on just a few areas risks missing opportunities.
4. **Idealism versus pragmatism.** Idealism is needed for bold action but risks being unrealistic. Pragmatism is needed to get things done but risks being timid.

Most library directors have limited budget flexibility. As an inclusion-centered leader, this limitation should not prohibit library directors to prioritize equity, inclusion and community needs in their allocations. These allocations should be based on strategic, measurable, achievable, realistic, timely, inclusive and equitable library activities *(See Theme 3 on pages 31–36 to develop a S.M.A.R.T.I.E. goal and action plan for your library).*

Action Remedies

1. Use an equity lens when making budgetary decisions. Review your budget annually with equity and inclusion in mind. If needing to cut budgetary spending or trying to save money, avoid under-funding equity and inclusion initiatives as they will be less likely to be successful and may cost your organization in the long run.

2. Equity and inclusion are value- and mission-driven activities for the library.

3. Avoid one-time inclusion-centered spending. Consider inclusion-centered supports and services that create lasting impact, and can become institutionalized. You may feel like you are making a difference, however you will not create lasting change.

4. Leverage the library budget with current city inclusion efforts. If possible, align your equity and inclusion efforts with the city's strategic equity and inclusion initiatives, and determine how and why the library would be an effective partner in these efforts. This is an effective way to ensure adequate sustainable funding for engagement with diverse community member groups and deeper partnerships with your local government departments.

Invest in Internal Inclusion-centered Library Organizational Activities

Invest in equity and inclusion data collection. This initiative is a meaningful sustainable way to help:
1. community member groups have a voice;
2. allocate resources effectively to those who need it most; and,
3. make the case for additional to potential sponsors, grant makers and local government. Collecting targeted data will enable you to track the progress of your equity and inclusion strategy efforts, make adjustments, and enable you to regularly report on the returns on investment.

Allocate funds for training and development programs to help staff learn and/or enhance their inclusion-centered skills with:
1. supporting adult learning and creating programs and services around science-based community issues; and,
2. engaging in community dialogues and facilitating building relationships with diverse community member groups.

An example of these considerations can be found *(see page 26)* in the Dallas Public Library's efforts in budgeting for equity. Though the Dallas Public Library is a big urban library with a large budget, the equity lens they use as well as the steps and considerations they take for addressing inequities in their service areas can be applied to all public libraries.

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CASE STUDY:
Dallas Public Library Budgeting for Equity and Inclusion

The Dallas Public Library in collaboration with the City Offices of Equity and Budget developed ***Budgeting for Equity*** — a tool designed for library directors as well as other city officials to assess and document the library's efforts to advance equity through allocation of financial and staff resources and developing a baseline of data to evaluate over time. Using an equity lens, the Dallas Public Library develops their budget using the following strategic points.

Highlighted in the triangle to the right are the key inclusion-centered strategic points all libraries, regardless of size, should consider when putting together their budgets with their boards and city budget offices.
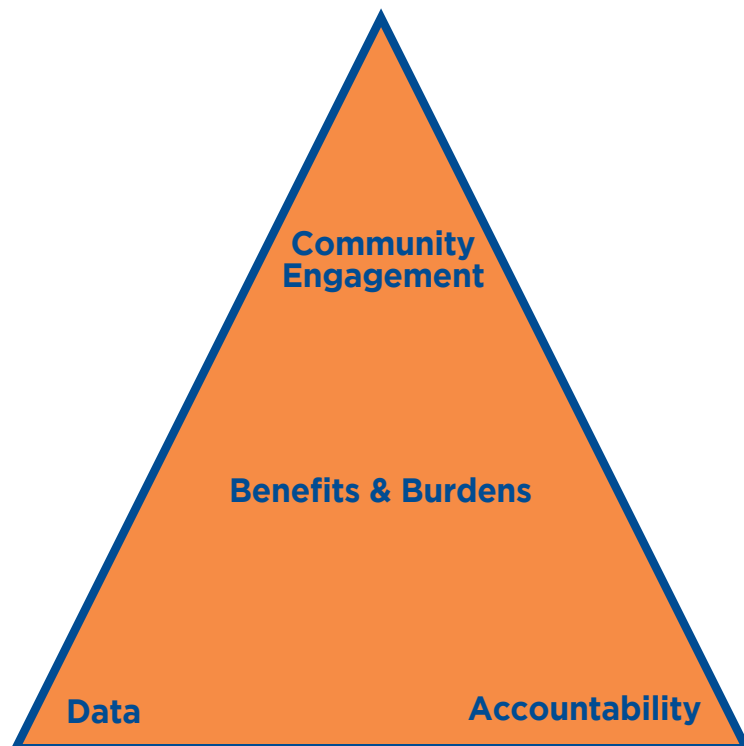
STRATEGY 1
Benefits and burdens from budget implementation — We must purposely use equity tools and frameworks to examine the benefits or burdens, or potential benefits or burdens, of our policies. Given existing inequities, serving people who have different circumstances and different histories equally is often inequitable. Instead, we must focus on the unique needs of all those we serve to make one cohesive Dallas better for all.

STRATEGY 2
Understanding the data — qualitative and quantitative insights — Departments [including the Dallas Public Library] advancing equity use qualitative and quantitative data to inform the ways they engage and involve those they serve, instead of making assumptions about those populations and conditions they face. Disaggregation of data allows the Departments [including the Dallas Public Library] to focus on race and socioeconomics — often greatest drivers of inequity — while considering identity intersections with gender, sexual orientation, immigration status or ability.

STRATEGY 3
Community engagement, relationship building and communication — The most equitable relationships are built on collaborating and deciding together with the least-resourced communities on plans, policies, and services, which requires language access, interpretive services and resources to ensure involvement of people who are differently abled. There are different levels of community engagement, the most inclusive of which is shared decision-making.

STRATEGY 4
Accountable for equity — Being accountable for equity means being responsive to the needs and concerns of those most impacted by the issues on which the Dallas Public Library is working, particularly communities of color, low-income neighborhoods and other who have been historically underrepresented in the civic process. Departments [including the Dallas Public Library] cannot advance equity in a sustained way without accountability for equity.

"You know, I never really thought about how the budget reflects our values in a concrete way, as much as anything does. We know the signage does, our physical space does, but the budget, maybe that was an 'aha moment' — making sure that it covers everybody, that it makes something for everybody."

– a ***Serving Communities*** library director

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WORKSHEET 2

Assessing the Inclusion-centered Level of Your Library's Budget

Objectives
• Determine inclusion-centered levels of library values through reassessing your budgetary decisions
• Determine ways you can amplify equity and inclusion as well as actionable science within your existing allocations
• Use an equity lens to analyze and determine current levels of equity in your library's budget
• Align library's equity and inclusion strategy and funding needed with your budget

What You Need
• A copy of your current budget
• A copy of your policies specifically pertaining to library budgetary matters
• A copy of your library's current budget and completed Budget Policy Checklist
• A copy of your library's mission, strategic plan and annual report
• A copy of your local government's equity and inclusion strategic initiatives
• Find a place where you can think with no interruptions

Time
PART 1: 1-2 hours
PART 2: 2-3 hours

Discover
This section contains two inter-related exercises — the first is a policy checklist and the second one is an activity that is designed to help you look at the outcomes from inclusive services and programs your library has invested in to determine:
1. positive impacts;
2. benefits to community members; and,
3. burdens/unintended consequences of these programs and services for both the communities you are trying to reach and for the library

Instructions
PART 1
Begin by using the Policy Check List on the next page to assess current budget practices.

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1. Has the library director discussed with the library board, management team, and staff the importance of funding for a range of inclusion-centered trainings, programs, and collections?	Y	N	IP	NA
2. Does the budget include funds for cultural competency and anti-bias training for library staff and volunteers?	Y	N	IP	NA
3. Does the budget intentionally include funds for programming geared to a diverse range of community groups that have been reviewed and evaluated by peer reviewers?	Y	N	IP	NA
4. Does the budget include funds for purchasing materials for the collection that reflect the diverse dimensions of cultural and ethnic groups for which the collection has been created for by peer reviewers?	Y	N	IP	NA
5. Does the budget allow for staff hours to spend outside the library connecting and providing services with diverse groups and populations?	Y	N	IP	NA
6. Does the budget include funds for recruitment efforts necessary to attract staff and volunteers reflective of the community?	Y	N	IP	NA
7. Does the budget include funds to offer culturally relevant digital resources that have been reviewed and evaluated by peer reviewers?	Y	N	IP	NA
8. Does the library seek out supplemental funding via grants, foundations and a Friends group to cover the costs of trainings, programs and special collections?	Y	N	IP	NA
9. Does the library have a list of community members who will advocate for the library and its inclusive efforts?	Y	N	IP	NA

Questions Specific to Actionable Science Policies

10. Does the budget include funds for purchasing materials or consultants for the library to conduct community dialogues and co-development sessions with underserved community members in order to advise and create inclusion-centered actionable science information, programs and services that reflect the wants and needs of cultural and ethnic groups?	Y	N	IP	NA
11. Does the library seek out supplemental funding via grants, foundations and a friends group to cover the costs of trainings, programs, tools and presenters on actionable science that is accessible to adult learners?	Y	N	IP	NA
12. Does the library have a list of community members who will advocate for the library and actionable science efforts?	Y	N	IP	NA
13. Has the library director discussed with the library board, management team, and staff the importance of funding for a range of inclusion-centered trainings, programs, and collections directly pertaining to actionable science?	Y	N	IP	NA
Total				

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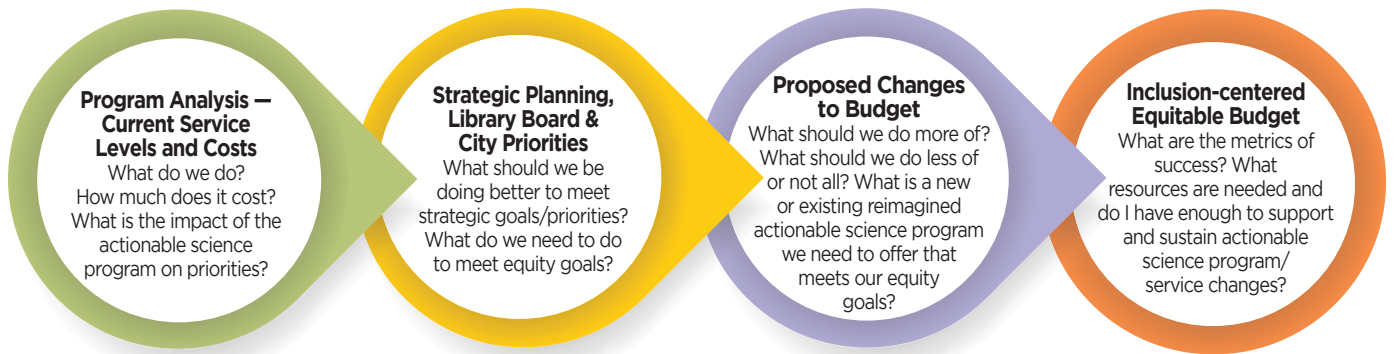awakening curiosity, enriching lives

PART 2
(This activity has been modified from Exhibit 2 Budgeting Approach that Progresses from Breadth to Depth on page 8 of *Re-thinking Budgeting: Budgeting for Equity — Tensions, Lessons and Steps for Success*.)

Discover
Often times when we think about equity initiatives, we think broad, sweeping changes (*breadth*) that will make immediate impact. However, more often than not, because of resource constraints such as staffing and finances, large initiatives are not realistic nor sustainable. Use your budget process to think more deeply (*depth*) about your library programs and services in order to identify the best opportunities for an in-depth reimagining of how a given program or service could enhance equity within your library. This worksheet is designed for you to reflect upon your programs and services, and explore an in-depth reimagining of one your library services and programs in alignment with the reality of what your budget can truly support.

The in-depth **Reimagining Budgeting Approach** looks like this:

Program Analysis — Current Service Levels and Costs
What do we do? How much does it cost? What is the impact of the actionable science program on priorities?

Strategic Planning, Library Board & City Priorities
What should we be doing better to meet strategic goals/priorities? What do we need to do to meet equity goals?

Proposed Changes to Budget
What should we do more of? What should we do less of or not all? What is a new or existing reimagined actionable science program we need to offer that meets our equity goals?

Inclusion-centered Equitable Budget
What are the metrics of success? What resources are needed and do I have enough to support and sustain actionable science program/ service changes?

Instructions
Actionable Science Program Equity Analysis
Review service levels and costs in your current budget. Highlight those actionable science programs and services that are strategic, inclusion-centered priorities. Place asterisks next to those highlighted programs and services that:
1. you want to further develop to broaden participation and enhance equitable access to actionable science-based community information and resources; and/or
2. align with city/government agency strategic actionable science priority

Answer the following questions about your asterisked programs and services:

QUESTION 1
Using evidence you have about the following outcomes from inclusive services and programs your library has invested in:
1. positive impacts;
2. benefits to community members; and,
3. burdens/unintended consequences of these programs and services for both the communities you are trying to reach and for the library

Program or services invested in	Positive impacts	Benefit to community members	Burdens/unintended consequences

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QUESTION 2
Are there any actionable science program and/or service alignment with city/government equity efforts?

QUESTION 3
Go back to the one inclusion-centered goal or outcome you would like to achieve, as well as the inclusion-centered, actionable science policies that will greatly improve achieving your goal or outcome if they are revised, implemented differently, or acted upon more consistently. What are the investments and budget allocations required to make this a reality?

Reflect
Reflecting on the previous exercises, how does the potential amount of extra effort by the library to increase access compare to the potential improvement caused by the one inclusion-centered goal and actionable science policy you identified? How might these changes be received by staff and the community?

Act
Action 1: Meet with a representative from a local government agency, community partner working with an underserved group, and/or an actionable science community to get outside input and ground truth to the importance of the library initiating such a change. How might you further leverage your investments with those from the government agencies or community partners?
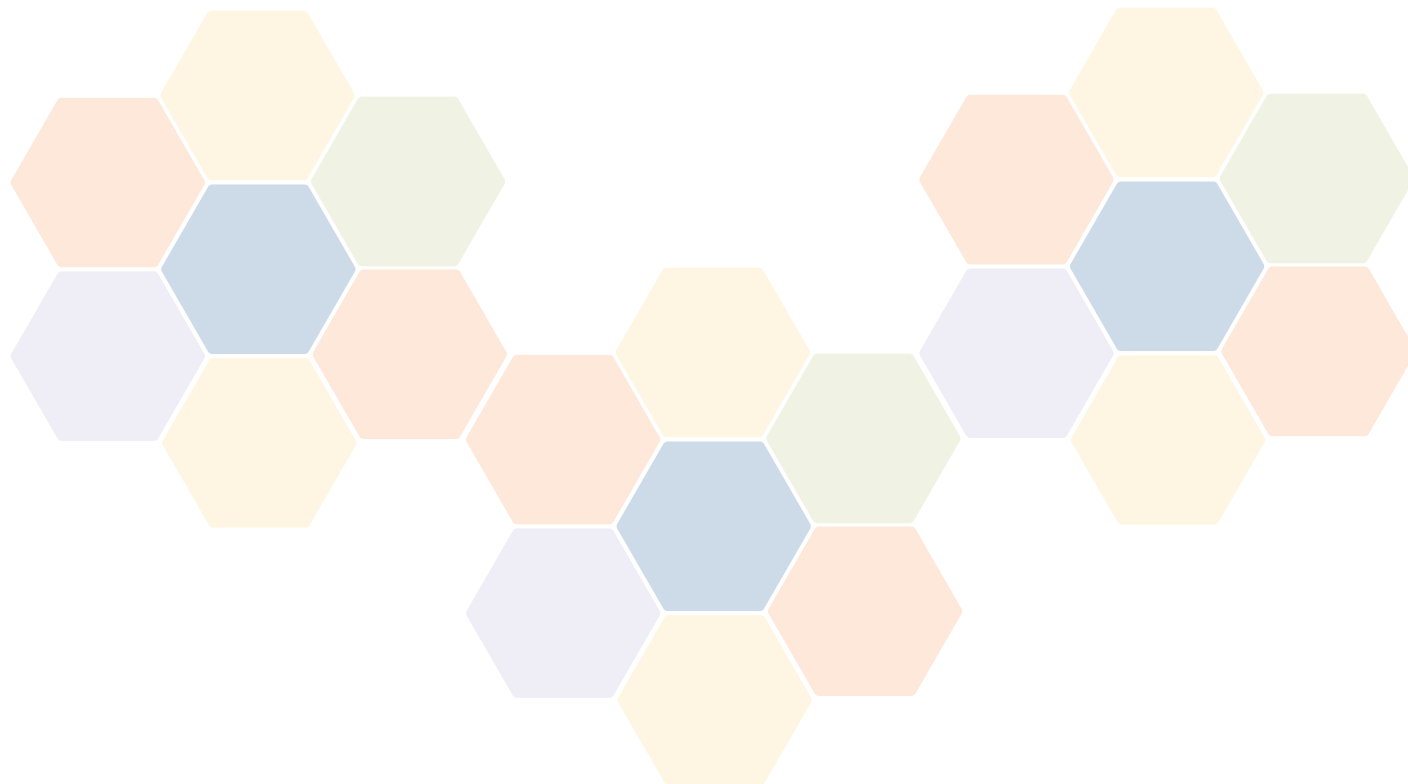
THEME 3
Inclusion-centered Goal-setting and Action-planning for Your Library

Prioritizing an inclusive, equitable and accessible library culture for all seems like a daunting task considering the combined, competing internal and external factors, pressures and demands. Proactively setting a goal and the action plan is an effective method to prioritizing all of those competing demands and focusing on planning inclusion-centered programs and services that are strategic, measurable, achievable, realistic and time-bound as inclusive and equitable (**S.M.A.R.T.I.E.**). In addition, goal setting helps you prioritize the allocation of limited resources and staff for the biggest results. Using *WORKSHEET 3: Goal and Action Plan for the Development of an Inclusion-centered Actionable Science Initiative for Adult Learners* and the *Serving Communities Framework* will help guide your own library's goal-setting process to identify and outline specific operational steps for connecting library staff, underserved members, and community partners to create an actionable inclusion-centered library program or service for adults.

Using Logic Models as a project management model tool is a great way to explicitly ensure that your goals, expectations and outcomes align to best serve both the library as well as underserved community members the library wants to serve more effectively.

Before you get started, some things to consider:

S.M.A.R.T.I.E. Goals
Goals are a specific way to define important outcomes for your library. Equity and inclusion is an active "state of being" for the library's ability to serve everyone in your community. Therefore, it is imperative that you weave a specific equity and inclusion component into your goal in order to produce better outcomes for underserved communities and to intentionally address the imbalance of social structures and connections between the library and underserved community members to support belonging.

Strategic — Reflects an important dimension to improving your library's priorities and capacity to be more inclusion-centered, and seeks to integrate this into your programmatic library culture and community engagement efforts to co-develop and connect underserved community groups with access to actionable science information.

Measurable — Includes the standards by which you and your co-development team define success and agree on whether the goal has been met.

Achievable and Actionable — Each component is focused with a clear pathway for the co-development team to successfully complete and implement, and where underserved community members are able to access, learn and immediately act upon the actionable science information and experiences received from the library.

Realistic — Not so challenging as to indicate lack of thought about resources, capacity, or execution; possible to track and worth the time and energy to do so.

Time-bound — The goal-setting and action-plan process has a clear deadline for completion and implementation.

Inclusive — Brings underserved people — particularly those most impacted — into processes, activities, and decision/policy-making in a way that shares power.

Equitable — Seeks to address the imbalance of social structures and connections between the library and underserved community members in order to provide everyone the opportunity for access to culturally responsive resources, programs and services they need to be successful.

Inclusion and Tokenism
Be aware and intentional about the differences between inclusion and tokenism. **Tokenism** is the practice of making only a perfunctory or symbolic effort to the co-development of a library service or program, especially by recruiting a small number of people from underrepresented groups in order to give the appearance of being inclusion-centered.

What's the difference? ***Power.*** The *Serving Communities Inclusion-centered Goal-setting and Action Plan* is about actively collaborating with underserved communities in a way that shares power, shrinks disparities, and leads to more equitable outcomes.

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Focus on Being Outcome-driven, Not Activity-driven

Some goals don't, at face value, specifically promote equity and inclusion, so you'll want to specify how you're mitigating disparate impact or advancing equity and inclusion in the goal you are setting. Your goal is a logical chain of activities and outcomes. Below is an example of being specific and reframing regular library operational goals — *"If we do X, then Y should happen."*

For more information on defining underserved community members and actionable science themes, check out the *Serving Communities: Inclusion-centered Leadership Practices in Community Member Experiences: The Development of Inclusion-centered Actionable Science Programs and Services for Adult Learners Module.*

Benefits for Using the Goal-setting and Action-planning Approach

1. This is a collaborative approach where everyone's experiences, knowledge and expertise can be captured to create a shared understanding and building of trust and respect.

2. The completed table becomes a communication tool to generate interest, seek additional community partners, and communicate to local government and funders of the importance of the work being done by the library.

Your adult/reference library staff has a goal to create sustainable, ongoing adult programming and services throughout the year that specifically help guardians and grandparents taking care of children, whose parent(s) are affected by opioid addiction, with remote learning, digital learning and support services they can access at the library. Here is an example of how you and your adult/reference library staff can express this goal as an outcome-based goal.

"We will consult with a coalition of affected grandparents/guardians, local government, and community partners who are focused on policies and programs supporting those who are struggling with addiction and their families from underserved communities most impacted by the opioid epidemic to get their insights, experience, knowledge and expertise throughout the process."

WORSHEET 3

Goal and Action Plan for the Development of an Inclusion-centered Actionable Science Initiative for Adult Learners

Objectives
• To be intentional and purposeful in the development and implementation of an inclusion-centered actionable science goal.
• Develop an action plan that is able to broaden participation and enhance access to the library.

What You Need
• Time where you do your best thinking and reflection with no interruptions, OR PREFERABLY invite a co-development team (5-10 individuals) comprised of a broad coalition of collaborators that bring experiences, knowledge, and expertise to assist you with the complexities of defining the types of services and information underserved community members want and need around the actionable science community issue impacting them
• Meeting space for either yourself or your co-development team
• Copy(ies) of the *Inclusion-centered Goal and Action Plan Worksheet*
• A copy of your library's strategic plan, library reports, metrics, and demographic information along with community research, asset maps (yours and by other groups) and other information that allows you to get a better understanding of the aspirations, wants, and needs of the diverse groups within the service area as well as in the community, and ways the library can serve them better.

Time
4-6 hours, if completing this by yourself or with a small group. (**NOTE:** It should take a similar amount of time when collaborating with a diverse co-development team together. Additional time will be required to invite and prepare the meeting.)

Discover
Using Logic Models as a project management model tool is a great way to explicitly ensure that your goals, expectations and outcomes align to best serve both the library as well as underserved community members the library wants to serve more effectively. The Goal-setting Table below, also known as a Logic Model, is a guide to the key elements:
1. for **setting goals** collectively by the library, community members and partners;
2. that serves as the **road map of strategies and actions** that will be implemented; and most importantly,
3. that can be **measured for the effectiveness and program quality** as well as impact on the problem and the people being served.

Name of Initiative:					
Problem Statement: What is the problem the initiative will address?					
Goal: If we do X, then Y should happen.					
For Whom	**Assumptions**	**Strategies/Activities**	**Outcomes**	**Measures of Success**	**Long-term Impacts**
Target group for the initiative	What you know, think, and/or believe about what's needed	Activities needed to achieve desired outcomes	Strategic, Measurable, Achievable, Realistic, Time-bound, Inclusive and Equitable	Information needed to show whether outcomes have been achieved and initiative is successful	Ultimate or long-term outcomes for initiative

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Instructions
STEP 1
Determine if you are going to develop the first draft by yourself or with a co-development. If you choose to develop the draft first, be sure to share it with key interested individuals and groups as you want their experience, expertise and knowledge integrated in the document as this will promote buy-in and better reflect the underserved community members you want to improve programs and services to. Better still, invite them to be a part of the process right from the start.

STEP 2
Make sure that you and/or the co-development team each have a copy of the *Inclusion-centered Goal and Action Plan Worksheet* along with access to pertinent information regarding the library, those impacted by the actionable science issues, a list of community assets, as examples.

STEP 3
Outlined below are a series of key questions that will guide your thinking and/or co-development group conversations. Answer the following questions and complete the *Inclusion-centered Goal and Action Plan Worksheet* on **page 35**.

QUESTION 1
"What is the problem to be addressed?"
(What actionable science issue affecting your community does your library believe is of strategic importance to your institution and the community?)

QUESTION 2
"Who will be served through your initiative?"
(Which underserved community member groups are affected by the actionable science issue?)

QUESTION 3
"What long-term impacts do you hope to achieve?" (State what will happen as a result of the library, community members and partners implementing this initiative. Are there any unintended consequences that arise that negatively impact other groups the library serves?)

QUESTION 4
"What outcomes do you expect?"
(Decide what outcomes you want to achieve.)

QUESTION 5
"What strategies/activities will you use?"
(What will you do? What activities and strategies will allow you to achieve the outcome? Again, what are there any unintended consequences that arise that negatively impact other groups the library serves?)

QUESTION 6
"How will you measure success?"
(How will you know that you have succeeded?)

QUESTION 7
"What are your assumptions about how and why your initiative will work?"
(What do you and your goal-setting team know, think, and/or believe about what's needed and will work? Beliefs about how and why change happens are usually easier to articulate after the rest of the logic model is largely filled in. Collaborators may hold different beliefs about what is necessary or what will work.)
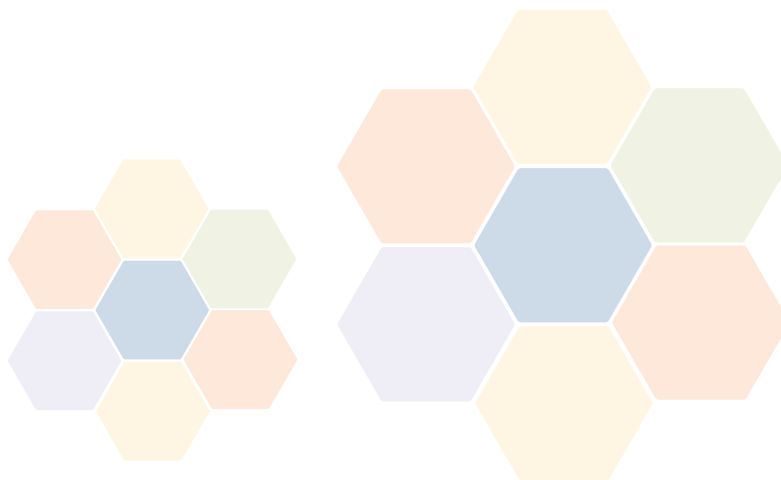
Inclusion-centered Goal and Action Plan Worksheet

Name of Initiative:

Problem Statement:

Goal:

Strategies/Activities	Outcomes	Measures of Success	Long-term Impacts
Activities needed to achieve desired outcomes	Strategic, Measurable, Achievable, Realistic, Time-bound, Inclusive, and Equitable	Information needed to show whether outcomes have been achieved and initiative is successful	Ultimate or long-term outcomes for initiative

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Decide

Once you and/or the co-development team has completed the *Inclusion-centered Goal and Action Plan Worksheet*, review the plan using the following questions:

QUESTION 1

What unintended disparate impact might result from this goal? Who have I consulted to check for unintended negative consequences? Am I missing any key partners or groups from this list?

QUESTION 2

If I added an outcome or activity goal related to a specific underserved community, will achieving this goal help build power and/or shrink disparities for this community? If so, how?

QUESTION 3

If the outcome specified in the goal isn't specifically promoting equity and inclusion, is the process of achieving this goal going to improve equity and inclusion between your library, community and/or with the actionable science program or service?

Act

Action 1: Revise the *Inclusion-centered Goal and Action Plan Worksheet* to reflect this additional reflection made by you and your team.

Action 2: Now use this plan as a road map for your library as well as a communication tool recruiting collaborations with underserved community members and partners to continue iterating upon the plan and securing the appropriate resources and supports.

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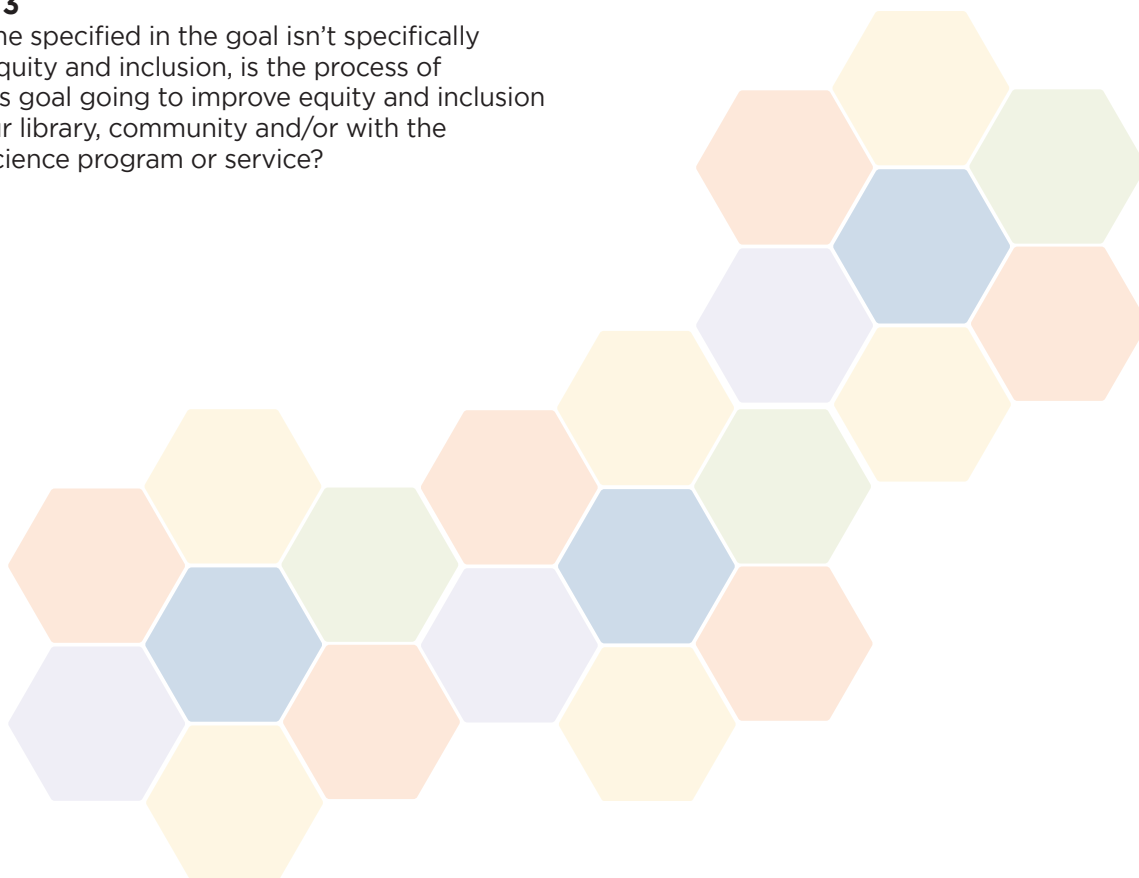
CALL TO ACTION

Final Thoughts

A key takeaway from this module, as a library director, is:

1. the importance of taking steps to aligning programs and services to meet unmet community needs, particularly around actionable science for adult learners;

2. your policies, budget and the types of services you offer outwardly speak of the values held by the library; It is important to learn from those not using the library — their understanding of what the library stands for, who they serve and why; and finally, 3) even prioritizing one inclusion and equity goal around equitable science furthers the position the library as an essential institution.

With Yourself

Just 10 minutes a day. Give yourself permission and grant yourself the time to reflect upon a key takeaway you found in these activities. In what ways does this understanding define or impact your leadership style, and what are your motivations, interests and vision for yourself as an inclusion-centered leader? The basis of change and action can only be made from a place of understanding and the ability to develop your own theory of action.

Be sensitive to your own reasons for how and why you lead in the current manner. This reflective practice allows you to consider your own beliefs while understanding the action of others. These are the initial steps for inclusive and equitable leadership. This approach will only work if you put the time in to develop your own understanding and sensitivities to being an inclusion-centered leader. Not taking this time means you will continue to do things in the same way, not be able to fully understand the needs and actions of others, and make the mistake of presuming you know.

With Your Staff

Start the conversation with your staff. Every library staff member, volunteer, friends group, and library board is or has the potential to be an inclusion-centered leader and can use their sphere of influence to affect change. The first step is to begin the discussion about what inclusion-centered leadership looks like to them, provide the opportunities to explore these concepts, their goals and aspirations as individuals (personally and professionally) and collectively within the library organization. The activities in the *Personal Inclusion-centered Leadership Practices Modules* are appropriate for everyone. These activities are also a great place to start the conversation of what an inclusion-centered library should look like and how it should function.

We encourage you to share the *Serving Communities Framework, Glossary* and *Leadership Modules* with all who have a part in the operational decision-making, development and implementation of your library policies, services, programs and community engagement activities.

With Diverse Community Members and Partners

Inclusion-centered leadership is founded on the principles that as a library leader you:
1. value racial, ethnic and cultural differences;
2. demonstrate flexibility in leadership style such that you seek diverse community members and partners in shaping library practices and vision; and
3. leverage your sphere of influence to advocate for library engagement in the development and access of relevant science-based community library programs and services that matter to adult learners. We hope that the *Serving Communities Equity Library Framework* and professional development modules assist in your pathway forward to inclusion-centered leadership.

RESOURCES

Inclusion-centered Budgeting In Libraries
Dall as Public Library. Budgeting For Equity Tool. Downloaded on January 18, 2024 at https://dallascityhall.com/departments/pnv/resilient_dallas/DCH%20Documents/Budgeting%20for%20Equity_FY20%20(1).pdf

Budgeting For Equity. https://gfoaorg.cdn.prismic.io/gfoaorg/c9583828-cb0a-4cd8-92d3-fb36db177221_Budgeting+for+Equity_R4.pdf

Recommended Resources Regarding Logic Models
The following websites offer further information on approaches to developing and using logic models.
We have already referred (footnote 1) to the following:

W.K. Kellogg Foundation Evaluation Handbook, Susan P. Curnan and Lisa LaCava (eds.) (2004). http://cyc.brandeis.edu/pdfs/reports/EvaluationHandbook.pdf

Greg, Erik. Usable Knowledge LLC. http://www.usablellc.net

A detailed guide that also uses a different framework and terms and provides helpful advice:
Innovation Network, "Logic Model Workbook." www.innonet.org/client_docs/File/logic_model_workbook.pdf

An article about logic model development with a complex but well-thought-out framework:
Renault, V., Fawcett, S., Milstein, B., Chapel, T. The Community Tool Box. Developing a Logic Model or Theory of Change. http://ctb.ku.edu/en/table-of-contents/overview/models-for-community-health-and-development/logic-model-development/main

Creating Program Logic Models (from Knowlton, L. W. and Phillips, C.C. (2013). *The Logic Model Guidebook: Better Strategies for Great Results.* Sage Publications.) http://www.sagepub.com/upm-data/23938_Chapter_3___Creating_Program_Logic_Models.pdf

Resources from the University of Wisconsin-Extension, Program Development and Evaluation Unit:
• http://www.uwex.edu/ces/pdande/evaluation/evallogicmodel.html
• http://bhpr.hrsa.gov/grants/areahealtheducationcenters/ta/trainings/materials/ta206wilmguideslides.pdf

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