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

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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.

# 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

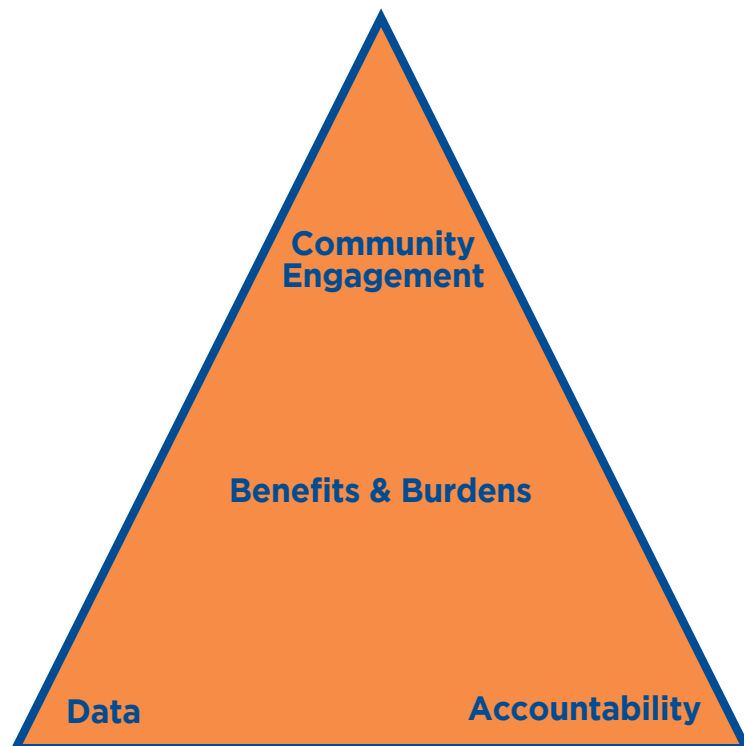
**Benefits and burdens from budget implementation** — We must purposely use equity tools and frameworks to examine the benefits or burdens, or potential benefits or burdens, of our policies. Given existing inequities, serving people who have different circumstances and different histories equally is 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 socioeconomic — 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.

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*“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.



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
<b>Questions Specific to Actionable Science Policies</b>				
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
<b>Total</b>				

## PART 2

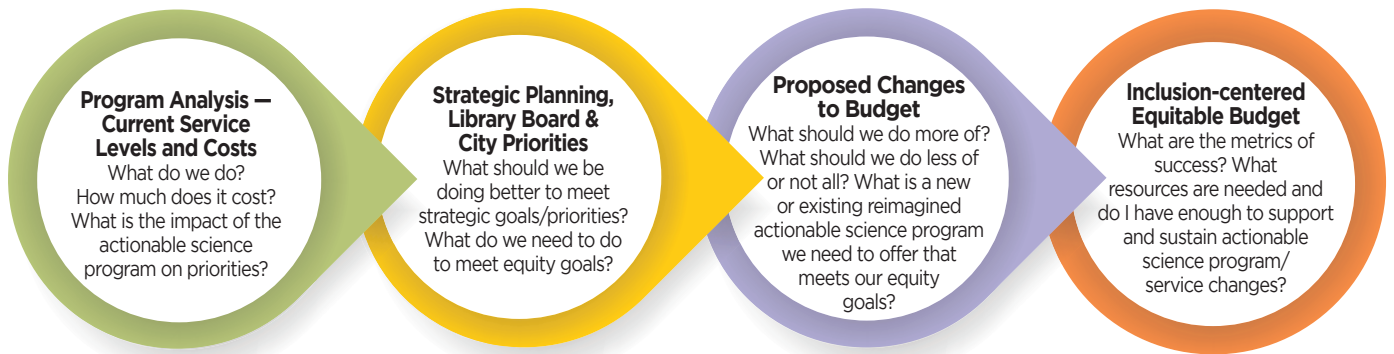
(This activity has been modified from Exhibit 2 Budgeting Approach that Progresses from Breadth to Depth on page 8 of *Re-thinking Budgeting: Budgeting for Equity – Tensions, Lessons and Steps for Success.*)

### 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:



### 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:

- you want to further develop to broaden participation and enhance equitable access to actionable science-based community information and resources; and/or
- 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:

- positive impacts;
- benefits to community members; and,
- 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

### 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?

