

2020

Core Values Assessment & Recommendations LEAP Project



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MLS Strategic Plan

Established 2020

Mission Statement

Connecting our diverse communities with resources and experiences to educate and enrich lives.

Core Values

- Equity, Diversity, and Inclusion
- People First
- Innovation
- Integrity
- Respect



Metropolitan
LIBRARY SYSTEM

Proposed Definitions

Equity, Diversity, & Inclusion

- You value the differences of your customers and coworkers
- You challenge yourself to see others' perspectives and overcome your own biases
- You question actions and decisions that marginalize others
- You take steps to increase the diversity of library-users and staff
- You work to reflect our diverse communities through library materials, resources, and programming
- You pursue opportunities to become more aware of issues faced by our diverse communities
- You advocate for change that will create more equitable outcomes and improve access to library resources
- You help everyone feel that they belong at the library

People First

- You assume best intentions.
- You are empowered to think critically, independently, and to make decisions that meet the needs of our customers
- You seek what is best for customers, rather than what is best for yourself or your group
- You make time to help colleagues
- You are eager to solve customer service challenges

Innovation

- You aren't held back by the status quo
- You are excited for the library to constantly improve and adapt
- You identify problems and propose solutions.
- You help coworkers develop and implement their ideas.
- You understand that not every idea is a winner.
- Your ideas are informed by community feedback, intuition, and experiences.

Respect

- You are thoughtful in your words and actions
- You are courteous to others
- You are considerate of the feelings and contributions of others and offer praise and encouragement to fellow coworkers
- You value the time and expertise of others, recognizing that exceptional work should never be thrown together in the final hour
- You participate constructively

Integrity

- You are known for candor, authenticity, transparency, and being non-political
- You only say things about fellow employees that you would say to their face
- You own your mistakes, apologize if necessary, and work to learn from them
- You treat people with respect regardless of their status or if they disagree with you
- You do not compromise your values to "fit in"

Executive Summary

How can the Metropolitan Library System (MLS) help staff understand the core values and mission statement? How can the values and the mission be integrated into the daily work of staff at all levels and how can MLS build a culture based on the values and the mission?

These are a few of the questions that were asked of the Leader Engagement and Acceleration Program (LEAP) group. After the MLS Commission approved the current core values and mission in June 2020, the LEAP group was asked to contribute to help MLS better define the values and mission for staff.

The LEAP group surveyed MLS staff at all levels, researched the cultures of other library systems and companies, and created a list of eight objectives to help MLS build a culture in which staff understand the values and mission and are able to live them out in their day-to-day work:

1. Staff at all levels have easy access to the core values and mission statement
2. Provide definitions of each core value, and show examples of how staff at different levels live out the core values in their daily work
3. Provide meaningful opportunities for staff to engage with leadership about the core values and mission statement
4. Further embed the core values and mission statement in the hiring process
5. Staff know how often and by which methods the core values will be discussed
6. Staff understand how to live out each core value
7. Cultivate a culture of thoughtful and purposeful risk-taking to ensure staff are comfortable living out values
8. Staff at all levels are held accountable for living out the core values and mission

Goal 1

Staff at all levels understand what the mission statement and core values are.

Background & Methodology

Background

In Fall 2019, Julie Ballou assembled staff in various positions across the organization to form the Strategic Focus Group (SFG). This group met regularly to brainstorm new core values and a mission statement to build a more cohesive culture at MLS and have shared language and goals. Dr. Larry White also led the Leadership Team through similar exercises. To gather feedback from a wide range of stakeholders, a survey was distributed to staff, the Commission, and customers. All responses were reviewed and integrated into a final draft that was presented to the Commission for final approval in June 2020.

In August 2020, the SFG resumed meetings and noted that the core values would need to be more clearly defined for staff. LEAP participants were identified as one of the groups that could participate in this process as it would provide strategic planning experience for the team. The LEAP group democratized the process by surveying staff at all levels to include as many voices and perspectives as possible. The LEAP group is one of the many stakeholders across the organization working to help staff better understand the core values and mission.

The group was charged with the following two goals:

- Staff at all levels understand what the mission statement and core values are.
- Staff understand how the core values and mission statement relate to their role within the library system.

Methodology

The LEAP team divided into two groups: internal research and external research.

The internal research group surveyed 276 public service staff. The survey generated 71 responses, 36 from Engagement and 35 from Access, with a response rate of 26%.

A similar survey was sent to 82 department staff and received a response rate of 19%. LEAP participants interviewed selected managers and administrators via Zoom calls to gather additional qualitative data.

The external research group researched practices and strategies of companies known for their positive work culture, such as Netflix, Patagonia, Zappos, and Southwest Airlines. They also researched and interviewed staff members from peer libraries such as the Charlotte Mecklenburg Library System, the Columbus Metro Library System, the Multnomah Library System, the Pioneer Library System, the Sacramento Public Library, and the Tulsa City-County Library System.

We then identified eight objectives, presented in the order in which we feel they should be implemented. Our hope is that by compiling the feedback of our peers and aligning it with highly successful strategies inspired by other organizations, this proposal will provide Leadership with ideas that represent the voice of Metro employees.

Goal 2

Staff understand how the core values and mission statement relate to their role within the library system.

SWOT Analysis

The following internal SWOT analysis was created using the feedback received on the new core values from the qualitative data gathered through in-person interviews with managers and the Leadership Team, as well as surveys sent out to departmental and frontline staff. Themes in the data were identified and summarized by the LEAP participants.

Stakeholder Group	Strengths	Weaknesses
System	<ul style="list-style-type: none"> Excitement around the core values Interim Executive Director with experience in change management Wealth of institutional knowledge on the Leadership Team 	No safe and effective avenues for bottom-up communication
Frontline	<ul style="list-style-type: none"> Helping people is why they work at the library Staff are accepting of new values and mission statement 	Not all staff can identify how the core values fit into their position
Departments	Strong desire among department heads to move back to a customer centric focus	Departments are siloed amongst each other and from libraries
Administration	Administration sees no barriers to implementing the new mission statement and values	Administration has expressed different understandings of what the new values mean

SWOT Analysis (cont.)

Stakeholder Group	Opportunities	Threats
System	<ul style="list-style-type: none"> Targeted training programs created for all staff Mentor program for staff interested in a library career Town halls conducted to increase transparency and buy-in 	Tall management structure creates red tape and barriers
Frontline	<ul style="list-style-type: none"> Indicated a desire for the values to be defined Willing to move ahead in a shared direction 	Frontline staff do not feel like they are consulted on policies and procedures or treated as subject experts
Departments	Create an atmosphere of collaboration and value	Still recovering from many changes and staff at all levels are change-weary
Administration	Administration can use the rollout of the new core values and mission statement to build trust and communication	Administration needs to fully buy-in or staff will not accept new values or mission statement

Goal 1

Staff at all levels understand the mission statement and core values.



Goal 1: Objective 1

Goal: Staff at all levels understand the mission statement and core values

Objective 1

Staff at all levels have easy access to the core values and mission statement.

Strategy 1.1

Provide a copy of the values and mission statement to each staff member.

- Marketing will create materials with the core values and mission statement to give to each staff member.
- Marketing will create either lanyard cards like what was done for Staff Day or business sized cards with the core values and mission statement. This way staff can carry the values and mission statement with them, which will make it easier to live them out day to day.
- Marketing will create large laminated posters for each location featuring our core values and their definitions, as well as blank areas for staff input.
 - Each poster will be displayed in a prominent staff location, such as a break room or workroom.
 - Staff can add sharpie notes or sticky notes of successes, challenges, questions, kudos, and encouragement related to these topics.
 - Notes can be shared and discussed in staff meetings and workshops (See Strategy 6.2).

Suggested Implementation: Marketing will draft, finalize, print, and distribute these materials within three months of project implementation.

Strategy 1.2

The intranet will have a permanent, direct link to the values and mission statement on the front page.

A direct link to the core values and mission statement will be posted in either the Pinned section at the top of the front page or in the Quick Links section on the side of the front page.

- Links and their requisite information will be updated as needed.
- Any additional information such as adding new definitions, examples, etc. will be available in the same document.
- Including a direct link will make it to where staff do not have to dig down into various links to get to the information they are looking for or sift through various iterations to find the most current set.

Suggested Implementation: Due to the simplicity of this task, this should be completed as soon as possible.

Strategy 1.3

Provide training and education related to the core values.

Quality training and educational opportunities based off our core values will be provided or incentivized to allow all staff to receive the knowledge they need to successfully understand and live the core values, along with growing as individuals.

Training and Educational Opportunities

- Accessibility training
- ASL, Languages other than English, Disability

Awareness, Special Needs, Assistive Technology, etc.

- Diversity and Inclusion training
- Implicit/Unconscious Bias, Cultural Sensitivity, LGBTQ+, Intercultural Communication, Inclusive Management, etc.
- Professional Development training
- Leadership, Management, Interviewing Skills, Public Speaking, etc.
- Mentoring opportunities
- Cross-departmental, Management, Peer, External/Community, etc.

Incentives

- Streamlined processes.
- Immediate supervisor approval is only needed for free training or educational opportunities.
- Less paperwork and a quicker reimbursement turnaround time for paid training.
- Only necessary information will be required on paperwork.
- Sections such as justification to attend should be communicated directly to supervisors, who then give permission to fill out the paperwork for final budget approval.

Prioritized time

- All staff are eligible for two (part-time staff) to four (full-time staff) hours of prioritized training or mentoring time each month.
- Prioritized time is for non-mandatory training or mentoring.
- Staff will identify what trainings they would like to be covered by this provision and work with their supervisors to schedule appropriate time around their other duties.
- Use of this time is not mandatory, nor are training opportunities limited to the above time limits.

Suggested Implementation:

- Incentives such as prioritized time to attend training, encouragement to begin mentoring relationships, and streamlined approval of free

training will begin immediately.

- Incentives like a streamlined approval process for paid trainings and providing an expanded catalog of trainings in house will be in place by the beginning of FY21 so that added costs can be factored into budget plans.

Strategy 1.4

Integrate core values and mission statement into New Employee Orientation (NEO).

All new staff will be introduced to and understand the core values by the time they complete NEO so that they begin their career with Metro with a firm understanding of what is expected of them.

- A copy of the core values and mission statement will be included in each new hire's folder.
- Our core values and mission statement will be discussed during the NEO presentation.
- HUM will lead NEO participants in an interactive activity in which they brainstorm ways that they will live each of the core values and the mission statement in their new jobs.

Suggested Implementation: As soon as possible, all NEO sessions will include the above.

Goal 1: Objective 2

Goal: Staff at all levels understand the mission statement and core values

Objective 2

Provide definitions of each core value, and show examples of how staff at different levels live out the core values in their daily work

Strategy 2.1

Create videos of staff explaining how they lived out one of the core values and post them on the intranet.

Recognizing behaviors that bring the library's values to life can be an effective tool to encourage others to do the same. We could do this by inviting staff to share their or a colleague's story about how they have lived out one of the core values.

These stories can take multiple forms: they can feature a single employee sharing their story or anecdote in a video on camera, or it can be a larger production with multiple people reenacting the scenario. The employees that are chosen will receive random MLS swag. These videos will help bring our core values to life by giving employees concrete examples of living them out.

Suggested Implementation:

- Create an intranet post asking for submissions of stories on the intranet.
- Core Value Champions (See Strategy 6.2) will choose one story each that best fits each core value and contact staff to film them for a video.
- One video will air quarterly at the beginning of the Town Hall meetings (See Strategy 3.1) and will then be posted on the intranet. To accommodate all five values, the last quarter will feature two videos.

Strategy 2.2

Create an interactive website akin to Wellness Works where staff can complete games and activities related to each of the core competencies.

It is essential for staff to engage with each of the values if we want them to live it out. One way to engage staff is by incorporating an interactive website that staff can complete games and activities related to the core competencies. Gamifying the core competencies is a fun way to connect with the values and make it easy to remember them.

The market is filled with several software platforms that allow administrators to set standards and monitor employee progress. Like the Wellness Works platform, we can award badges or points to those who finish games and activities. The points or badges can go towards rewards like Wellness Works. Some software solutions provide peer recognition where staff can recognize other coworkers who live out the values and award points to them.

Suggested Implementation:

Research programs such as:

- Bonusly (bonus.ly)
- WooBoard (wooboard.com)
- Kudos (kudos.com)
- Bonusly has a plan that costs \$4.50 per person per month. We would need to contact WooBoard and Kudos to get a quote for their services.

Core Value	Definition
Equity, Diversity, and Inclusion	<ul style="list-style-type: none"> • You value the differences of your customers and coworkers • You challenge yourself to see others' perspectives and to overcome your own biases • You question actions and decisions that marginalize others • You take steps to increase the diversity of library-users and staff • You work to reflect our diverse communities through library materials, resources, and programming • You pursue opportunities to learn more about issues faced by our diverse communities • You advocate for change that will create more equitable outcomes and improve access to library resources • You help everyone feel that they belong at the library
People First	<ul style="list-style-type: none"> • You assume best intentions • You are empowered to think critically, independently, and to make decisions that meet the needs of our customers • You seek what is best for customers, rather than what is best for yourself or your group • You make time to help colleagues • You are eager to solve customer service challenges
Innovation	<ul style="list-style-type: none"> • You are not held back by the status quo • You are excited for the library to constantly improve and adapt • You identify problems and propose solutions • You help coworkers develop and implement their ideas • You understand that not every idea is a winner • Your ideas are informed by community feedback, intuition, and experience
Integrity	<ul style="list-style-type: none"> • You are known for candor, authenticity, transparency, and being non-political • You only say things about fellow employees that you would say to their face • You own your mistakes, apologize if necessary, and work to learn from them • You treat people with respect regardless of their status or if they disagree with you • You do not compromise your values to "fit in"
Respect	<ul style="list-style-type: none"> • You are thoughtful in your words and actions • You are courteous to others • You are considerate of the feelings and contributions of others and offer praise and encouragement to fellow coworkers • You value the time and expertise of others, recognizing that exceptional work should never be thrown together in the final hour • You participate constructively • You value the opinions and contributions of all employees

Goal 1: Objective 3

Goal: Staff at all levels understand the mission statement and core values

Objective 3

Provide meaningful opportunities for staff to engage with leadership about the core values and mission statement

Strategy 3.1

Host quarterly virtual town halls with different members of the leadership team.

How often?

We believe a quarterly town hall is necessary to achieve the level of transparency and quality communication desired by staff, as evidenced from our internal survey and the internal assessment survey conducted in 2018.

What will the town hall look like?

In-person meetings are difficult to achieve at this time and even after a return to normal, MLS employs some 450 individuals spread out across 20 buildings. As a result, any town hall conducted will need to be virtual. These become less relational as attendees increase, therefore, we recommend multiple town halls each quarter to accommodate the schedules of various staff and keep the size down.

We would love to reduce the number of staff at each town hall to less than 50, but this would require some 9-10 town halls per quarter as the organization grows. This is excessive and does not allow for the smaller group conversations that need to take place at a local level. We feel 4-5 town halls are sufficient if each is recorded and made available for all staff to view.

Who will conduct and moderate the town halls?

The purpose is to engage with leadership about the values and mission. While Leadership Team will participate, it might be helpful to have additional staff who are proficient in moderating handle this

task. This will free up LT to address questions and engage without the worry of keeping things on track.

What is the focus?

As mentioned before, the focus of these town halls will be to discuss the core values and our mission statement. How are things going? What things work? Where do we need to improve? Is there consistency at all levels? Based on our mission, what things have been identified in various departments to move that mission along? Are we making progress? What obstacles are preventing progress?

Deliverables?

One result of the town hall will be the actual discussion. This is critical for staff across all levels to engage with leadership and see what thoughts they have, what solutions have been proposed, where we are headed, etc.

We understand that Larry has started to incorporate video messages into his communication plan and that could lead to some overlap in content as we employ this new strategy. However, the town halls will include a variety of staff from across the system, deeper discussions related to specific content, and opportunities to engage with the topic speakers in real time.

Additionally, recorded sessions will allow for idea generation, increased transparency, and proper accountability at all levels.

Finally, staff approval/morale can be measured

continually via the town halls. Concerns should be evaluated and responded to by leadership and if necessary, changes made to reflect alignment with core values and the mission.

Strategy 3.2

Create more avenues for (safe) bottom-up communication.

For most people, “safe” communication is equivalent to anonymous communication. This makes sense as people assume there can be no retaliation or threat to them if their identity is not revealed. There are two points to note with this assumption.

1. The first is that although anonymity can begin a conversation, it simultaneously ends any further dialogue. When important issues are not being addressed, anonymity offers protection to individuals who raise concerns, but they can no longer be involved in the process or the outcome. Authentic communication is an ongoing event with questions, clarifications, discussion, reasoning, definitions, agreements, etc. We must be willing to stand behind our assertions if we intend others to take them seriously.
2. Second is the elephant in the room, the looming problem that anonymity seeks to address; we are not safe. People hide their identity because of the real or perceived response they could receive. There is no greater example of this than the relationship that exists between manager and direct report. It is one thing to have a difficult conversation with a friend; it is quite another to have that same conversation with your boss, someone who by their position could withhold opportunities or pay because they disagree or become offended in the process.

Ideally, staff across the system would have authentic and transparent conversations with leadership team members. This will only occur if employees at all levels feel safe enough to share their thoughts,

ideas, problems, and solutions. It will not be easy to attach your name to those conversations, but this is the culture we are choosing to adopt. A repeating pattern in most of our surveys has been a lack of respect; one that exists from a perception that upper management does not listen to their frontline experts (their direct reports) when making decisions that impact frontline staff and customers.

The methods currently available to staff for these conversations include 1) email and 2) discussions with their supervisor who would either answer on behalf of Leadership Team or relay the conversation. Neither of these are anonymous and both have their downsides, either real or perceived.

Sending email to executives or leadership team can create anxiety for some and has the potential to go unanswered. Additionally, others might have the same question, resulting in multiple emails for the same topic as others would not be privy to what was already sent. Topics addressed with a supervisor could also be “dropped” if the supervisor receives an answer, but the author feels it was not adequately addressed. It might also take a while for the question to be relayed and the response to come back to the originator.

We understand the hard work of building respect and better communication channels will take time. Therefore, we recommend a two-fold approach for creating “safe” avenues of bottom-up communication.

Director Discussions / like Ask Tim (Full Anonymity)

- This form of anonymous communication was well received by most in the past and can be achieved via different formats. Ask Tim was done via the intranet, but responses could also be given via video posts or virtual meetings. Larry has already implemented this by creating bi-weekly video updates to address questions being

raised by staff. Some additions to the process would include:

- Involve more than just the Executive Director; anyone with authority and responsibility for the topic could respond. We feel this would reduce the burden on Larry and increase response time as the person most knowledgeable could reply.
- Focus (monthly, quarterly) on different areas of administration across the system (ED, SMG, Department heads, managers, etc.). These responses could be aggregated and included in other forms of one-way communications such as Newsletters, video updates, intranet posts, etc.
- Planned Obsolescence - As we work to raise the level of respect and integrity, the need for anonymous communication would wane and we would expect to see a reduced number of questions being raised in this forum.

Internal Mediation (Partial Anonymity)

- We recommend creating a panel of mediators that would be given additional training to aid in this process. For example, a single individual from said panel - and who would be outside the normal working group or chain of command for an individual - could facilitate one-on-one discussions with the originating party. That facilitator could then raise the issue with those that would be affected, working back and forth through the process until a solution was obtained.
- While not entirely anonymous, there would still be protection for the direct report while trust and respect are built through the process. Certainly, this process would not be the norm, but could be helpful in this time of transition or on a case-by-case basis where staff do not feel safe. Part of this process might also be to identify what caused the employee to use this method rather than a more direct conversation.
 - This same process could be conducted online

via a new intranet. If the platform were more social, reflecting the natural way in which people communicate, organic groupings could develop as trust grows among staff. It would offer opportunities for front line staff to safely connect with someone outside their normal workgroup and receive alternate viewpoints, tips for starting a difficult conversation, etc. The mediation process could be more visible by outlining how it works, who is on the panel, etc.

- A possible barrier to mediation would be the perception that Human Resources already performs this function. While certain policies do exist - Complaint Resolution, Grievance, and Due Process Hearings - these are all well beyond the scope of the types of communication we are hoping to foster. We are looking for ways to encourage bottom-up communication about improving the library system. These would include front-line issues related to procedures or customer interaction, workflow processes, ideas for innovation or work flexibility. One would not typically take these types of concerns to Human Resources.
 - Additionally, if a situation arose while dealing with these issues that could be mediated by HR, that would mean official paperwork, employee records, etc. There are skilled individuals in HUM that might be able to serve as mediators, but having the mediator be an employee of the library that serves in an HR capacity has the potential to create more fear and lack of trust because of its official outcome and subsequent documentation.
 - We are looking for more organic relationships to foster growth and development of good, respectful communication between parties about non-HUM topics. These relationships would serve to help individuals understand each other's differing points of views, ideas and requests and move toward better solutions for all.

Goal 1: Objective 4

Goal: Staff at all levels understand the mission statement and core values

Objective 4:

Further embed the core values and mission statement in the hiring process

Strategy 4.1

Interview candidates will be asked questions related to the core values and/or the mission.

If we are to build a culture in which staff at all levels understand the mission and live out the core values in their daily work, we must hire candidates who have demonstrated these values in previous employment or experiences. We support the work that has already been done to create and ask interview questions related to the “new” core values and mission during interviews.

Going forward, we recommend and support the creation of additional questions to learn how candidates have demonstrated behaviors that support the core values and mission, especially as the core values of Equity, Diversity and Inclusion and Innovation, respectively, are new to Metro Library.

Strategy 4.2

Include non-managerial staff in the interview process.

When interviewing candidates, it is important that those involved in the interview process know what success looks like in the position. This knowledge lies with the hiring manager, but it should also lie with employees who understand the mission and who are successfully living out the core values in the same position. If these employees are not included in the interview process, the organization misses an opportunity for valuable insight when interviewing candidates.

Additionally, being included in the interview process provides non-managerial staff with interview experience, both in general but also specific to Metro Library. We recommend that when possible, non-managerial staff who meet the aforementioned criteria be included in the interview process. Whether they are a teammate of the open position and/or are currently succeeding in this job, the organization would benefit from drawing on their experience.



Goal 1: Objective 5

Goal: Staff at all levels understand the mission statement and core values

Objective 5:

Staff know how often and by which methods the core values will be discussed

Strategy 5.1

Create a communication plan to post on the intranet.

The plan will be updated as needed based on any additional communication methods or strategies that may be added.

Communication	Frequency	Goal	Owner	Audience
Laminated posters for each location	Daily/as needed	To provide staff the ability to recognize their peers in the short-term for living out the core values	Individual employees	All staff (divided by location)
Core Value Discussions	Monthly (during location or dept. meetings)	To encourage open dialogue and communication among staff regarding their perception of the core values at their location	Library & Dept. Managers	All staff (divided by location or dept.)
Individual Discussions	Monthly (during PD meetings)	To allow staff the opportunity to reflect on their adherence to the core values	Each employee's manager	All staff (individually)
Virtual Town Halls	Quarterly	To bring all staff together to discuss important topics and align everyone to the same goals	Leadership/SMG	All staff
Core Value Videos	Quarterly	To engage and inspire staff to live out the core values by seeing their peers recognized	MAC/Core Value Champions	All staff
Culture Design Canvas	Annually	To identify and name parts of Metro's culture and assess how values manifest in the workplace	SMG	SMG/PSLT
Core Value Workshops	Annually	To give staff in similar positions opportunities to discuss challenges, experiences, and opportunities related to living out the core values in their roles at the library	Core Value Champions/L&D	All staff

Goal 2

Staff understand how the core values and mission statement relate to their role within the library system.



Goal 2: Objective 6

Goal: Staff understand how the core values and mission statement relate to their role within the library system

Objective 6:

Staff understand how to live out each core value

Strategy 6.1

Staff have a foundation for understanding how the core values and mission statement relate to their role through various learning opportunities.

- Continued learning will be required of staff at least once a year. Select staff day sessions, LinkedIn Learning trainings, and other applicable learning opportunities will be categorized as fulfilling the requirement for the core value they pertain to and for which positions. These do not include trainings required of all staff. Staff may train in the core value of their choosing but must train in at least three different core values in a three-year period.
- The library system will periodically bring in speakers to help expand all staff's understanding of the core values. There will be the opportunity for staff to submit questions to the speaker beforehand. These can be pre-recorded for ease of access but tailored to different groups of staff (ex: access, engagement, departments, management, admin).

Strategy 6.2

Staff have opportunities to share their understanding of and experiences related to the core values with their peers, as well as opportunities to seek feedback and guidance from their peers.

All staff will have the opportunity to apply to be Core Value Champions for a year.

- These champions will be leaders in our efforts to live out our core values, by setting a good example of putting the core values into practice and by acting as a resource for staff who need guidance in living out the core values in their work.
- Champions will have access to trainings, webinars, and speakers that will help further their understanding of the core values, mentorship, and leadership.
- Champions will also lead the workshops (see next page) for those in similar positions to their own and help to create or recommend content for other trainings.
- Champions will be encouraged to suggest additions and revisions to content such as core value definitions and examples, etc.
- 15 champions will be chosen each year by Leadership Team.
- Applications will include a personal statement, a supervisor recommendation, and a peer recommendation.
- A wide variety of locations and positions will be represented, with staff at different levels of the organization being selected at similar proportions to the overall staff.
- No one may be a core value champion for two years in a row, unless applicants are lacking.

Strategy 6.2 (cont.)

Every year, each staff member will attend a workshop with other staff in similar positions to discuss challenges, experiences, and opportunities related to living out the core values in their roles at the library.

- Learning & Development will organize workshops for 10-15 attendees each in similar positions (ex: access staff, engagement staff, department staff, management, and administration) from various locations.
- A Core Values Champion will lead the workshop, guide the discussion, keep the conversation on track, and encourage everyone's active participation.
- These meetings will be 4 hours long, to give staff enough time and space away from their regular duties to focus on creative thinking, absorbing information, and connecting with other staff. These workshops will include icebreakers, activities, videos, and guided discussion. Staff should come prepared with talking points and questions, including topics that have come up in other staff discussions and shared on their location's poster (See Strategy 1.1). There will be ample break time to allow staff time to regroup and be fully present in the workshop.
- As a group, participants will submit takeaways for how to live out each core value in their roles, that they feel others in their position would benefit from. These submissions will be incorporated into the interactive content site or posted on the intranet for all staff to have access to.



Goal 2: Objective 7

Goal: Staff understand how the core values and mission statement relate to their role within the library system

Objective 7:

Cultivate a culture of thoughtful and purposeful risk-taking to ensure staff are comfortable living out values

Strategy 7.1

Encourage teams to self-reflect on how their team is living out the core value and mission statement using the Culture Design Canvas tool.

While we recognize that MLS has its own culture as an organization, each branch and department also have their own culture impacted by personalities, job duties, and management styles. Core values will not always manifest the same way in each space. For this reason, we believe it is important for each department to regularly reflect on how their team is living out the core values. Specifically, we recommend that each department, branch, and leadership group complete a self-assessment at least once a year. The purpose is not to be self-congratulatory or self-flagellating, but to allow teams to identify areas of strength and opportunities for growth. This is a task regularly completed by individuals in their appraisals, but not by groups. Creating an additional tool for feedback opens lines of communication and helps build trust in coworkers.

We recommend two tools: Culture Design Canvas for leadership teams and the use of core value discussion guides for branches/departments (included in the Appendix)

1. The Culture Design Canvas is a visual tool to help teams identify and name important parts of their culture (rewards, punishments, rules, priorities, rituals, etc.) and to assess how values manifest in the workplace. This tool is particularly helpful because it provides infrastructure through which to think about culture, which can be a nebulous

term. It also helps identify discrepancies between practices and values.

- a. Additionally, teams can create a canvas for where they see themselves now, and what they would like their culture to look like in the future. This makes change feel realistic and manageable. The Design Canvas was successfully used by the Chicago Public Library Senior Management Group, and they reported finding it beneficial in their pursuit of a culture change.
- b. This exercise can be adjusted to accommodate available funds. This exercise is recommended for leadership because they are the best positioned to make changes to identified problems.

Suggested implementation:

1. Option 1: Senior Management Group and PSLT attend the day-long Culture Design Masterclass (~\$5,000 for 10 participants). This class also trains attendees to implement the design canvas with groups.
2. Option 2: Senior Management Group and PSLT use the free Culture Design Canvas online to facilitate its completion themselves.
3. The core value discussion guides can prompt teams to reflect on their experience as an employee in a specific branch or department. Because immediate coworkers are the individuals staff spend the most time with each day, we believe it is crucial for local groups to spend time in honest self-reflection.

Strategy 7.1 (cont.)

Suggested implementation:

- Release list of core value discussion guides to supervisors and managers, and introduce them at monthly managers' meetings (January 2021)
- Managers facilitate discussion at February 2021 monthly staff meeting, preferably sharing the questions beforehand with staff so they can have additional time to reflect.
- Managers type up a summary of the discussion, identify areas of strengths and of growth, and share them with regional managers/department managers for accountability. We recommend these topics be regularly discussed in managers' meetings with their supervisors. (March 2021)
- Process is repeated yearly to assess growth and include new staff in the exercise.

Strategy 7.2

Promote psychological safety within the workplace to ensure staff can live out the core values successfully

The Center for Creative Leadership defines psychological safety as “a shared belief held by members of a team that the team will not embarrass, reject, or punish them for speaking up.” It manifests in three ways: measuring, training, and coaching. A lack of psychological safety makes staff unvalued, stressed, and disengaged. Alternatively, a psychologically safe environment is an incubator for innovation, creativity, and risk-taking. Like Maslow's Pyramid of Needs, psychological safety is the building block that enables flourishing and success at all levels to occur. Without psychological safety, employees will not feel empowered to provide honest feedback (unless it is anonymous) and are more likely to blindly agree out of fear of losing their jobs. Additionally, they may be more reticent to point out problems because they feel they won't be heard. Problems accumulate and affect overall customer service and experience.

In the various surveys administered, many staff members reported feeling like their feedback was not valued or listened to, further enhanced by a feeling of suspicion and distrust. Psychological safety is critical for MLS's core values of EDI, People First, Innovation, Integrity, and Respect to manifest. Without it, the organization will continue to struggle with employee retention, recruitment, and staff morale which in turn affects the quality of service to our community. As explained by Dr. Amy Edmondson, the researcher who coined the term, psychological safety is a description of an environment, not a practice. For MLS to shift towards a culture of psychological safety, it will need on-going practices in place. It is not a “silver bullet.”

To measure psychological safety, we recommend starting with a baseline temperature of psychological safety at each branch/department using the empirically validated 7 question scale



Strategy 7.2 (cont.)

developed at the Harvard Business School. We believe it is important for staff to experience psychological safety within the organization but also within their day-to-day teams.

1. If you make a mistake on this team, it is often held against you.
2. Members of this team are able to bring up problems and tough issues.
3. People on this team sometimes reject others for being different.
4. It is safe to take a risk on this team.
5. It is difficult to ask other members of this team for help.
6. No one on this team would deliberately act in a way that undermines my efforts.
7. Working with members of this team, my unique skills and talents are valued and utilized.

The second steps (training and coaching) are more thoroughly described in the other individual core value reports. Creating a culture of psychological safety is complex and can manifest in many ways. We recommend MLS prioritize tactics that are oriented towards creating psychological safety among staff.



Goal 2: Objective 8

Goal: Staff understand how the core values and mission statement relate to their role within the library system

Objective 8:

Staff at all levels are held accountable for living out the core values and mission statement in their work

Strategy 8.1

Add core value specific language to each of the current PD competencies.

- Identify the core value that relates to each behavioral indicator already included on the Quick Reference chart.
- Add additional behavioral indicators for core values that are underrepresented.
- Add self-reflection questions for each competency that prompt staff and supervisors to reflect on the core values while completing PD documentation.
- A sample edit of the Quick Reference Chart is on page 3. The chart should be reviewed and further refined by an appropriate work group.

Strategy 8.2

Regularly discuss the core values in 1-on-1s and in staff meetings.

- Use the core value prompting questions from the Quick Reference Charts to encourage dialogue between supervisors and direct reports about how the core values look in their specific role.
- Use the core value discussion questions (Page 26) to talk about one of the core values in staff or departmental meetings. Attempt to go through all five values each year.

Strategy 8.3

Find ways to recognize staff who embody the Core Values.

- Incorporate the core values into the Salutes section on the intranet
- Do regular Shelf-Life features on each of the core values.
- Ask for staff input on examples of how they or their coworkers embody the highlighted core value.
- Create a comprehensive core values video each year to show at Staff Day. The video should be consistently refreshed with new interviews and examples of ways staff and the system as a whole are working towards the values.



Discussion Guides



Discussion Guide:

Equity, Diversity & Inclusion

1. When is a time you or a coworker have prioritized equity, diversity, and inclusion in the decision-making process?
2. Which of your own biases have you uncovered while working at the library or elsewhere?
3. What was an instance in which you felt the need to bend the rules in order to ensure a fair outcome?
4. Have you identified areas where the library is falling behind in our efforts regarding equity, diversity, or inclusion?
5. Have you ever championed an effort to increase equity, diversity, or inclusion within your workplace or the system?
6. How willing are you to speak up if you see a situation that is not equitable or inclusive?
7. Have you ever had a situation where you look back and realized that you were not as equitable, inclusive, or unbiased as you are today (as you hoped)?
8. How does equity, diversity, and inclusion factor into your daily life as a library employee?
9. What are the biggest challenges facing libraries when it comes to equity, diversity, and inclusion?
10. What are some effective ways that libraries can promote equity, diversity, and inclusion in our communities?

Discussion Guide:

People First

1. What do you do to make people want to be around you at work?
2. Have you ever felt unrecognized or undervalued for a contribution you made at work?
3. What is an example of good/bad customer service that you have received in the past?
4. What is a time that you were proud of the level of customer service you gave a customer?
5. Are you empowered to make independent decisions in the favor of the customer?
6. Does leadership encourage and support a culture of what is best for the customer rather than what is best for organizational processes or best for the staff?
7. What do our customers like most about the library?
8. What are things we could change to make their experience more enjoyable?

Discussion Guide: Innovation

1. Have you ever felt like you had an innovative idea that was not given an opportunity? How could you have been supported better?
2. If money or staff resources were not an issue, what new service or process would you suggest the library create?
3. What services or processes have improved during your time here? How did those changes come about?

Discussion Guide:

Integrity

1. Why is integrity important at work?
2. What are some traits of someone who has integrity?
3. Are there any areas where you feel we are not acting with integrity and why? In other words, do we practice what we preach? Can you provide examples?
4. During staff meetings, do you find it easy to raise objections and discuss possible solutions, or do you stay silent and keep your thoughts to yourself?

Discussion Guide:

Respect

1. Could you talk about a time where you felt respected at work? (What actions show that you are being respected?)
2. What are some examples of disrespect and how could we limit those in our everyday interactions? (What actions show that you are being disrespected?)
3. How could we encourage respect at work?
4. How does personality come into play when determining what is respectful to an individual?
5. When was the last time you were praised for a job well-done, even if it was the expected performance for your position?
6. How often do you participate in gossip? How would it make you feel if the talk were about you?

Survey Summaries



Metropolitan
LIBRARY SYSTEM

The State of Core Values at MLS

	EDI	People First
Access	<ul style="list-style-type: none"> • Many agree this is very important. Some are impacted by this on a personal level. • Some recognize that they have biases, which is a start. • Summarized by one person as “more aptly described as belonging.” Said not just positive for productivity, but essentially for staff morale. • Mentioning of bias training, better hiring strategies and employee referrals to increase diversity and inclusivity. • Excitement about championing this and other values and pride that this is one of our core values. • One employee stated they and family members have been treated differently at the library due to race. • Three staff said they were enthusiastic about EDI, but think it will be difficult to carry out. • Someone mentioned the importance of being equitable rather than equal, which sometimes means giving more attention to some people. • Lack of diversity in collection. Need more diversity in programming. 	<ul style="list-style-type: none"> • Many seem to value the connection we have with customers and community. • Many remarked that people and the community are why we are here. • No one who said they were enthusiastic about People First also said they thought it would be difficult to carry out. • “Seeing people, not problems.” • One person said they feel like customers have been overlooked in recent years and feels like policy and procedure get in the way.
Engagement	<ul style="list-style-type: none"> • Many believe we are lacking in this area but excited this is a core value. • The library staff should reflect the community they serve. • They want EDI training for staff. 	<ul style="list-style-type: none"> • They wanted to work at the library to help people. • The library needs to reach out to the community. • Trainings about empathy-driven service models
Departments	<ul style="list-style-type: none"> • 11 of the 16 respondents indicated that EDI would be difficult for MLS to carry out. • 9 of the 16 respondents indicated that EDI was the value they were most enthusiastic about. • Most of our staff, especially management, are white, able-bodied, and straight. • We do not look like the communities that we serve. • We need to try radically different approaches to what we have been doing. 	<ul style="list-style-type: none"> • “We have gone way beyond to keep the people and staff first and foremost safe and their needs met in a timely manner.” • Staff entered this profession to be community focused.

The State of Core Values at MLS (cont.)

	Innovation	Integrity	Respect
Access	<ul style="list-style-type: none"> • Access side is not enthusiastic about and thinks we will have a tough time with "Innovation." This seems to be due to equating innovation with change, and many are change-weary. • One respondent said Change \neq Innovation – says MLS asks for input with little follow through • Difficult to keep up with changes, unnecessary stress, inconsistent experience for customers • Some access staff don't understand how to implement innovation in their positions 	<ul style="list-style-type: none"> • "All the others will follow if you have integrity." • All but one person who put integrity on Q5 put other things as well. • Not much feedback on integrity being difficult or why. 	<ul style="list-style-type: none"> • One person said, "I feel if you put respect first, everything after that will fall into place." • All but one person who put respect on Q5 put other things as well, perhaps showing how much this ties in with the other core values. • Lack of respect from customers seen as a barrier by some. • One person equated hiring from within (especially for management) with respect and wants more training programs. Says this affects morale and retention. • One person said, "respect has always been difficult [with] MLS," and that it was a feeling they picked up from coworkers.
Engagement	<ul style="list-style-type: none"> • Another area many believe we are lacking in and the most difficult to implement. • When it comes to innovation many said they do not feel supported. They are told "no" and/or there is too much "red tape" to get anything done. • We do not take enough risks because we are afraid to fail. 	<ul style="list-style-type: none"> • Management needs to be transparent and accountable. • Staff and community need to trust the library. • Integrity has to extend to all levels of our organization. 	<ul style="list-style-type: none"> • Frontline staff do not feel respected by upper management. They are not included or consulted about new policies or procedures.
Departments	<ul style="list-style-type: none"> • We follow what other systems are doing instead of being innovative. • We focus too much on how we have always done it. • We have a fear of failure. • Better communication is needed between libraries and departments. 	<ul style="list-style-type: none"> • Only 1 respondent indicated that Integrity would be difficult for MLS to carry out. 	<ul style="list-style-type: none"> • Ideas that do not come from leadership are not given respect • "The hierarchical structure of our organization does not foster respect"

The State of Core Values at MLS (cont.)

Staff were asked “Which core values do you feel MLS will have a difficult time carrying out?” and “Which core values are you most enthusiastic about?” Staff were able to select more than one value or none. The total times each was selected is indicated in the chart below.

	EDI		People First		Innovation		Integrity		Respect	
	Difficult to Carry Out	Most Excited for	Difficult to Carry Out	Most Excited for	Difficult to Carry Out	Most Excited for	Difficult to Carry Out	Most Excited for	Difficult to Carry Out	Most Excited for
Access (n=35)	4 (11%)	20 (57%)	2 (5%)	18 (51%)	8 (22%)	1 (3%)	2 (6%)	8 (23%)	6 (17%)	14 (40%)
Engagement (n=36)	16 (44%)	20 (55%)	1 (3%)	15 (42%)	21 (58%)	15 (41%)	10 (28%)	7 (19%)	8 (22%)	8 (22%)
Departments (n=16)	11 (69%)	9 (56%)	3 (19%)	6 (38%)	7 (44%)	3 (19%)	1 (6%)	3 (19%)	6 (38%)	3 (19%)
Total (n=87)	31 (36%)	49 (56%)	6 (7%)	39 (45%)	36 (41%)	19 (22%)	13 (15%)	18 (20%)	20 (23%)	25 (29%)

Staff were asked “Do you feel you understand what our new core values and mission statement mean?” and “Do you feel you understand how these apply to your position?” Their responses are provided below.

	Do you understand what our new core values and mission statement mean?			Do you feel you understand how these apply to your position?		
	Yes	No	Maybe	Yes	No	Maybe
Access (n=35)	29	0	6	29	0	5
Engagement (n=36)	30	3	3	29	2	3
Departments (n=16)	10	3	3	8	3	5
Total (n=87)	75	6	11	66	5	13

Public Service Managers Survey

This survey was conducted by Matthew Cotter during a Public Service Managers meeting. Managers were asked “Do you feel communication is important in the adoption of these new values? What do you find most useful in this process?” “Do you believe the current state of communication is adequate for the task? What could be improved?” “What level of interest do you have in adopting these new values? Why?” and “What areas - communication or otherwise - do you feel present the biggest challenge in the adoption of these values?” Their responses are provided below.

	Do you feel communication is important in the adoption of these new values? What do you find most useful in this process?	Do you believe the current state of communication is adequate for the task? What could be improved?	What level of interest do you have in adopting these new values? Why?	What areas - communication or otherwise - do you feel present the biggest challenge in the adoption of these values?
Public Service Managers	<ul style="list-style-type: none"> • Positive way to reinforce the values is to celebrate them when displayed. • Clarity must start from the top down and be consistent through all levels. 	<ul style="list-style-type: none"> • It is hard to apply without proper definitions of these values. • Our leaders must model these values with their own actions. 	<ul style="list-style-type: none"> • Many asked for a vision statement before deeper discussions of the topic. • Staff feel they embody the values, but do not see those above them being held to the same standard. They need to see the entire organization operate with these values. 	<ul style="list-style-type: none"> • The responsibility sometimes falls to front line staff to live these out, but they do not see it above them in all other areas of the organization. Staff also need to be engaged in the conversation. • Do not just hand this down. Let staff have their input and be included in the process. For those that care, we must give them the opportunity to participate. • This process should not be rushed. While we need a deadline for “getting things done,” defining these terms will take time.

Senior Management Group Survey

This survey was conducted by Sarah Brown and was intended for Senior Management Group, except for one participant. SMG were asked "Which core value do you feel MLS will have a difficult time carrying out? Why?," "What barriers do you feel may prevent you from implementing these Core Values in your work?," "What barriers do you feel may prevent your direct reports from implementing these Values?," "What processes or resources are in place that you believe will help you implement these new Values and Mission Statement?" Their responses are provided below.

	Which core value do you feel MLS will have a difficult time carrying out? Why?	What barriers do you feel may prevent you from implementing these Core Values in your work?	What barriers do you feel may prevent your direct reports from implementing these Values?	What processes or resources are in place that you believe will help you implement these new Values and Mission Statement?
Senior Management Group	<ul style="list-style-type: none"> Doesn't think they should be easy. Sees them as a way we should be living, treating customers, and treating each other People First. If we don't take care of staff, they won't take care of the public. E.D.I.- Not so much diversity of races but bringing new people, with different experiences or views to the table. Each Core Value is a value that everyone in the organization has agreed are important to them and there should not be an issue carrying them out. 	<ul style="list-style-type: none"> Communication- There hasn't been a lot of communication about the Values or Mission. It isn't in our day-to-day work (on the Leadership level), but it should be. Repeatedly came up that there are different understandings of what the Values mean. Doesn't see any barriers for them to implement. 	<ul style="list-style-type: none"> Barrier that are self-imposed. Not having a vision statement. Not having a clear definition. What do the values mean for us as a collective instead of individuals. Doesn't see any barriers for their direct reports. 	<ul style="list-style-type: none"> We should have systems in place to reward or redirect people that are or are not owning or living those values. There needs to be more accountability at all levels. We need to find out from the public (in a data driven way) what needs we can serve that are in our lane and produce measures of how we are meeting our objectives that are in line with our Values. We are at a place where it feels like we are starting over or that we can make a fresh start. Hiring processes can help implement the Values by hiring the right people. We are also putting in place training modules for each of the Values that will provide a set of coursework that will explain what each one means and how they can be implemented in day-to-day life. LEAP. We have the people that are helping us to identify what these Values mean and how we can implement them. We have a Commission that has agreed these are the Core Values that we will support. We have a library staff and a library management team that have made commitments to empower these values and implement them across the system.

Competency Quick Reference Charts



Accountability

Takes responsibility for results (Integrity); acts as a responsible steward of resources (Integrity); owns mistakes as well as successes and learns from both (Integrity); demonstrates adaptability and responsiveness to change (Innovation); takes ownership of emotions and manages conflict effectively (Respect)

Meets	
Core Value Represented	Behavioral Indicator
EDI	<ul style="list-style-type: none"> • Considers how actions or resources may impact marginalized groups differently and works to make equitable choices
People First	<ul style="list-style-type: none"> • Readily accepts assignments and assumes a fair share of the workload
Innovation	<ul style="list-style-type: none"> • Applies feedback to resolve and minimize errors • Approaches change positively, treating new situations as opportunities for learning or growth
Integrity	<ul style="list-style-type: none"> • Demonstrates awareness of how actions impact resources (e.g., people, time, money); uses resources appropriately to accomplish goals/tasks • Meets standards regarding punctuality, attendance, and dress • Understands job responsibilities and takes ownership of tasks without prompting • Consistently meets commitments to others
Respect	<ul style="list-style-type: none"> • Prevents emotions from negatively affecting work performance and relationships; addresses conflict constructively • Acts in a way that demonstrates trust in others to do their job
Exceeds	
EDI	<ul style="list-style-type: none"> • Advocates for changes that treat all customers and staff more equitably
People First	<ul style="list-style-type: none"> • Frequently exceeds commitments to others (such as by delivering work early)
Innovation	<ul style="list-style-type: none"> • Proactively takes measures to improve performance • Quickly modifies behavior to deal effectively with changes in work processes or environment
Integrity	<ul style="list-style-type: none"> • Volunteers for assignments • Identifies inappropriate use of resources and acts to mitigate • Keeps confidences and promotes the value of trust and respect for personal confidences throughout the organization
Respect	<ul style="list-style-type: none"> • Recognizes when changing circumstances may affect the ability to meet commitments and notifies others/makes new arrangements • Confidently and effectively resolves sensitive workplace issues

Self-Reflection Questions

Equity, Diversity, and Inclusion	How do I actively work against racism and systems of oppression?
People First	Do I consider the needs of my coworkers and customers while carrying out my job duties?
Innovation	Do I look for ways to improve myself and the system at large?
Integrity	Do I hold myself to a high standard?
Respect	Do I consider how my actions affect those around me?

Communication

Expresses and receives information and ideas successfully; demonstrates emotional intelligence to communicate effectively with individuals of varied backgrounds and interests (EDI); keeps current with library activity and appropriately asks questions/shares input (Innovation); keeps others informed about issues that affect them (People First)

Meets	
Core Value Represented	Behavioral Indicator
EDI	<ul style="list-style-type: none"> Creates space for those who may not feel comfortable speaking
People First	<ul style="list-style-type: none"> Consistently delivers accurate, clear, and concise messages using various communication tools to effectively inform a variety of audiences Keeps appropriate parties informed in a timely manner about issues, activities, plans, and decisions that affect them Delivers messages in an appropriate and positive manner
Innovation	<ul style="list-style-type: none"> Tailors message, style, tone and techniques depending on the needs of the situation or audience Keeps current on Library activity by reading updates; asks questions and shares input as appropriate
Integrity	<ul style="list-style-type: none"> Has a knack for diplomacy and fosters goodwill between groups and organizations
Respect	<ul style="list-style-type: none"> Regularly demonstrates active listening skills, candor, openness, sincerity, and tact Initiates and receives open and consistent communication with others

Exceeds	
People First	<ul style="list-style-type: none"> Anticipates communication needs and proactively shares relevant information with appropriate parties Responds and relates to people in all positions, initiating and maintaining relationships inside and outside his or her organization and field of expertise
Innovation	<ul style="list-style-type: none"> Recognizes and effectively communicates in complex situations requiring flexible or targeted approaches Raises potential problems in meetings along with possible solutions
Integrity	<ul style="list-style-type: none"> Has a knack for diplomacy and fosters goodwill between groups and organizations Recognizes own communication strengths and development areas and works to improve as needed
Respect	<ul style="list-style-type: none"> Encourages and open exchange of ideas and different points of view; demonstrates candor and composure even when it is difficult Uses varied communication vehicles and opportunities to promote dialogue, shared understanding and consensus

Self-Reflection Questions

Equity, Diversity, and Inclusion	Do I avoid using generalizations or stereotypes in my written and verbal communication?
People First	Do I give people my full attention when listening?
Innovation	Am I comfortable speaking up when I have an idea?
Integrity	When receiving feedback, do I listen without getting defensive?
Respect	Do I allow others to speak without interrupting them or finishing their sentences?

Customer Service

Develops and maintains effective relationships with members and colleagues (People First); demonstrates concern for and meets or exceeds the needs and expectations of external and/or internal customers (People First)

Meets	
Core Value Represented	Behavioral Indicator
EDI	<ul style="list-style-type: none"> Recognizes, respects, and welcomes the diverse nature of the library's members, community and employees Recognizes racism and other systems of discrimination and exclusion in the community and the library and interrupts them by way of culturally competent customer service Values diversity, generating an air of acceptance and goodwill toward everyone
People First	<ul style="list-style-type: none"> Consistently meets customers' needs, despite time pressures or obstacles, following Metro's standards for quality, service, and professionalism Recognizes when work processes or other issues are negatively affecting customers and personally takes appropriate steps to eliminate problems Projects a positive, helpful attitude, proactively engaging customers Prioritizes interactions with members
Innovation	<ul style="list-style-type: none"> Anticipates the differences in individuals / groups served and tailors approach to provide high-quality and meaningful service
Exceeds	
People First	<ul style="list-style-type: none"> Takes extraordinary action when required to meet customers' needs Shares information with members to build their capabilities and understanding of policies, materials, resources, and technology Collects feedback from and conducts follow-up with customers in order to improve service; shares customer input within the team and Library when appropriate to improve service on a broader level. Exhibits foresight to identify and defuse conflicts and roadblocks before they occur
Innovation	<ul style="list-style-type: none"> Recognizes patterns and recommends solutions to customer service challenges
Integrity	<ul style="list-style-type: none"> Sought out by customers because of their empathy, compassion, and ability to deliver outstanding service
Respect	<ul style="list-style-type: none"> Resolves difficult and complex situations effectively without further escalation; addresses upset customers with ease

Self-Reflection Questions

Equity, Diversity, and Inclusion	Do I challenge my own implicit biases to provide the highest quality service?
People First	In what specific ways have I exceeded the expectations of someone recently?
Innovation	Do I speak positively of new ideas and services?
Integrity	What have I failed to do that I said I would do, and can I redeem the situation?
Respect	Do I make customers feel special and valued?

Professional Development

Takes initiative to identify, develop, and apply the technical and interpersonal skills/knowledge needed for effective job performance (Integrity); demonstrates ability to learn and use existing and emerging tools (including technology) to achieve job related purposes or goals (Innovation)

Meets	
Core Value Represented	Behavioral Indicator
EDI	<ul style="list-style-type: none"> Examines own biases and behaviors to avoid stereotypical responses Develops an understanding of the effects of racism and other systems of discrimination, and learns techniques for disrupting them and promoting cultural competence
Innovation	<ul style="list-style-type: none"> Seeks, learns, and integrates new job related skills, knowledge, and tools (including technology) into work Identifies and takes advantage of appropriate learning opportunities, such as on the job experiences, collaborative work, and professional development conferences/webinars Understands technology and the ways it is being used to achieve specific purposes or goals, and applies technology solutions successfully Understands and uses resources and strategies for keeping up with new ideas and technologies Readily gets involved in activities that will challenge and stretch current skills and intellectual prowess
Respect	<ul style="list-style-type: none"> Uses feedback from coworkers and customers to find ways of enhancing performance
Exceeds	
EDI	<ul style="list-style-type: none"> Recognizes the value of diversity and works to incorporate a wide variety of views into their professional development
People First	<ul style="list-style-type: none"> Proactively requests feedback from coworkers and members and uses it to enhance personal performance Proactively seeks opportunities to apply and share newly gained knowledge, skills, and experiences with colleagues Learns from success and failures, and helps others to benefit from their experiences
Innovation	<ul style="list-style-type: none"> Seeks, learns, and integrates new job related skills, knowledge, and tools (including technology) into work Introduces and recommends new tools (including technology solutions) to improve work performance, processes, or service delivery Persistently challenges the status quo to identify areas for improvement others have overlooked
Integrity	<ul style="list-style-type: none"> Identifies learning needs and creates a plan to achieve them

Self-Reflection Questions

Equity, Diversity, and Inclusion	Do I seek out diverse voices when selecting avenues of Professional Development?
People First	How has professional development enabled me to better help customers or coworkers?
Innovation	Am I staying current in the field and pushing the system ahead of the curve?
Integrity	Am I open about my areas of possible growth and do I seek ways to develop in those areas?
Respect	What feedback have I received that I have actively worked on?

Teamwork

Proactively demonstrates the ability and desire to work cooperatively and foster team success (Respect); demonstrates empathy and respect for colleagues (Respect)

Meets	
Core Value Represented	Behavioral Indicator
EDI	<ul style="list-style-type: none"> Recognizes and values individual differences and talents within the team; consistently works well with a variety of different individuals and personality types Creates a climate that treats interactions between diverse people and groups as the norm
People First	<ul style="list-style-type: none"> Is aware of coworkers' assignments / projects responsibilities and acts to support or assist Supports the team despite different perspectives or setbacks Willingly collaborates across departments Recognizes and encourages the behaviors that contribute to teamwork Easily builds lasting, constructive, and mutually beneficial relationships with others
Integrity	<ul style="list-style-type: none"> Gives honest and constructive feedback to other team members; receives constructive feedback willingly
Respect	<ul style="list-style-type: none"> Contributes to a problem-solving environment, working toward mutually acceptable solutions; resolves confrontations and disagreements constructively Provides opportunities for people to learn to work together
Exceeds	
EDI	<ul style="list-style-type: none"> Fosters a climate of inclusion, where diverse thoughts are freely shared and integrated to develop plans and solutions that are best suited to circumstances
People First	<ul style="list-style-type: none"> Consistently demonstrates flexibility to support the team Uses a variety of methods and tailors approach when communicating information to ensure all team members have the information they need to be successful Involves team members in setting team goals, establishing ways to achieve them, and defining expectations about how team members will work together Encourages team members to lead projects or tasks Inspires a sense of mutual accountability in which the team's goals have priority over individual interests
Innovation	<ul style="list-style-type: none"> Actively seeks opportunities to participate on local or system-wide cross-functional teams and contribute to team success (e.g. by helping team members, sharing knowledge, or coaching others) Makes recommendations for achieving team goals Thoughtfully fashions creative solutions that satisfy all parties
Integrity	<ul style="list-style-type: none"> Is unbiased and trustworthy in situations that involve personal conflicts of interest
Respect	<ul style="list-style-type: none"> Exhibits a high level of acceptance, cooperation, and respect to achieve common goals

Self-Reflection Questions

Equity, Diversity, and Inclusion	Do I make sure that everyone at the table is given a voice?
People First	Do I consider the needs of my coworkers and customers while carrying out my job duties?
Innovation	How have I worked with others to develop and refine an idea?
Integrity	Do I pull my weight as a teammate?
Respect	Do I graciously accept when others have different ideas than me?

Core Value Reports



December 2020

Initiatives in Equity, Diversity, and Inclusion

Prepared by:
Sarah Brown (DN) and Ellory Williams (VI)

Executive Summary

Sarah Brown (DN) and Ellory Williams (VI) prepared this report as part of the LEAP 2020. We were charged with developing a plan to implement the core value of Equity, Diversity, and Inclusion (E.D.I.) across the library system. We conducted research and surveyed staff to understand the state of E.D.I. both in and outside of the system. We used these findings to identify barriers to E.D.I. and to create solutions.

Current State of Equity, Diversity, and Inclusion

Overall, staff were excited about E.D.I. being added as a new core value, but many were wary about both our ability to carry it out and of our commitment to make meaningful changes. We identified four main themes among our barriers to implementing this core value.

Major Themes:

- Commitment to maintaining the status quo
- The library system is averse to perceived risk
- Lack of understanding of the issues
- Barriers to access

Bridges to Equity, Diversity, and Inclusion

We propose the following solutions to address these concerns:

- Changing our mindset as a system to better align with E.D.I. practices
- Providing trainings over various E.D.I. topics
- Creation of a task force and new groups to push forward our E.D.I. efforts
- Formalized caregiver procedures for adult patrons
- Becoming more inclusive of transgender and gender non-conforming staff and customers
- Reducing barriers to access
- Increasing access to borrow for customers facing housing insecurity or who are experiencing homelessness
- Increasing the variety of languages our collections and resources are offered in
- Increasing access to physical libraries for areas without easy access
- Actively recruiting with E.D.I. in mind
- Removing possible bias from hiring practices
- Collecting E.D.I. data during the hiring process to allow us to evaluate our procedures
- Increasing accessibility on our website
- Providing digital resources with more accessibility features
- Making assistive technology available to all customers and ensuring staff are trained in its use
- Increasing accessibility during virtual and in-person programming
- Audit and improvement of library spaces to ensure accessibility to customer needs

Conclusion

Staff at MLS are excited about E.D.I. but many doubt the system's commitment to the value. By creating concrete procedures, breaking down barriers to access, and leaning into providing more resources for staff and our communities, we can create change that is transformative, rather than merely performative, with the end goal of helping everyone feel that they belong at the library.

Proposed Definition of E.D.I.

You value the differences of your customers and coworkers

You challenge yourself to see others' perspectives and overcome your own biases

You question actions and decisions that marginalize others

You take steps to increase the diversity of library-users and staff

You work to reflect our diverse communities through library materials, resources, and programming

You pursue opportunities to become more aware of issues faced by our diverse communities

You advocate for change that will create more equitable outcomes and improve access to library resources

You help everyone feel that they belong at the library

Background

In June of 2020, Equity, Diversity, and Inclusion (E.D.I.) was approved as one of the new core values for the Metropolitan Library System. At its initial inception, there was no formal definition or use cases for how this value would be implemented at Metro. Due to this, Larry White, the interim executive director, charged the LEAP participants with developing a plan for how each core value could be implemented across the system. It is important to note that LEAP participants are just one group among the many stakeholders that are working on this process throughout the system. All recommendations included herein were made in good faith, based on our research and staff experience.

To start it is essential to have an understanding of what equity, diversity, and inclusion mean. The American Library Association (ALA) states the following, "The American Library Association believes that everyone deserves equitable rights and opportunities. The goal is to create a just and equitable association, profession, and society where everyone has access to social power, resources, and physical and psychological safety. ALA has chosen to define "diversity" in all its complexity in order to recognize and honor the uniqueness of each ALA member, all members of our profession, and our very diverse communities. ALA believes that, to be inclusive, our association, profession, and society must recognize the inherent worth and dignity of every member of the community; involve and empower all members to participate and contribute; promote and sustain a sense of belonging; and value and practice respect for the talents, beliefs, backgrounds, and ways of living of all members."

Equity

Equity is not the same as formal equality. Formal equality implies sameness. Equity, on the other hand, assumes difference and takes difference into account to ensure a fair process and, ultimately, a fair (or equitable) outcome. Equity recognizes that some groups were (and are) disadvantaged in accessing educational and employment opportunities and are, therefore, underrepresented or marginalized in many organizations and institutions. The effects of that exclusion often linger systemically within organizational policies, practices, and procedures. Equity, therefore, means increasing diversity by ameliorating conditions of disadvantaged groups.

Diversity

Diversity can be defined as the sum of the ways that people are both alike and different. Visible diversity is generally those attributes or characteristics that are external. However, diversity goes beyond the external to internal characteristics that we choose to define as ‘invisible’ diversity. Invisible diversity includes those characteristics and attributes that are not readily seen. When we recognize, value, and embrace diversity, we are recognizing, valuing, and embracing the uniqueness of each individual.

Inclusion

Inclusion means an environment in which all individuals are treated fairly and respectfully; are valued for their distinctive skills, experiences, and perspectives; have equal access to resources and opportunities; and can contribute fully to the organization’s success.”

Definitions adapted from ALA.org (See Resource 1) and OCLC.org (See Resource 2)

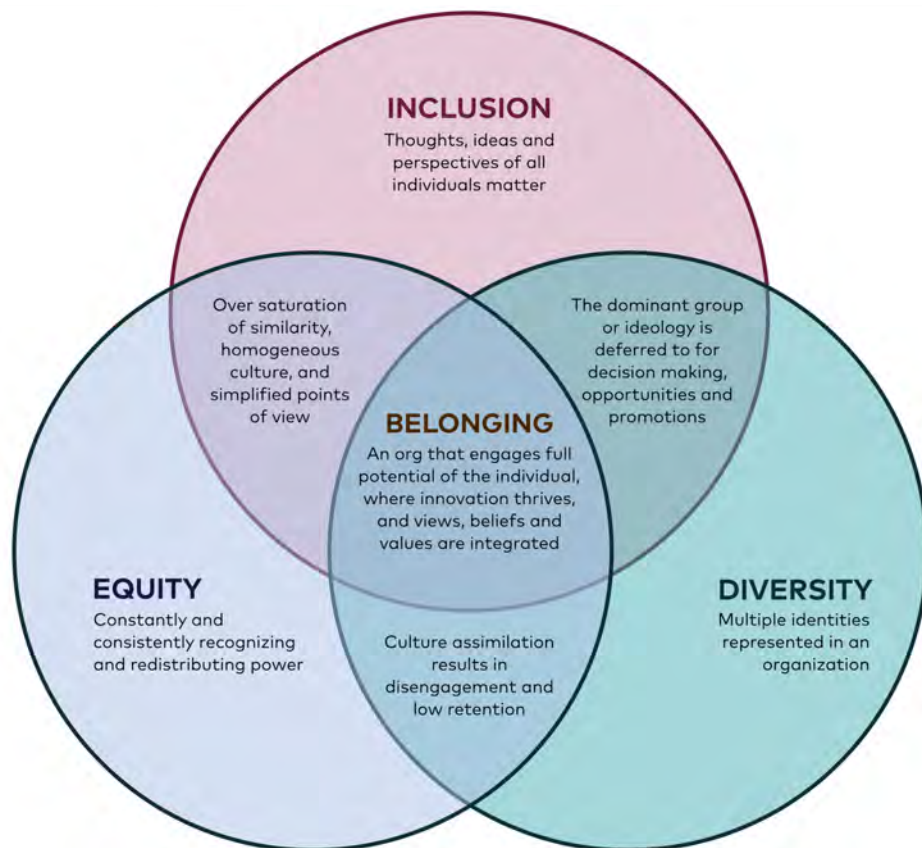


Image courtesy of medium.com

Current State of Equity, Diversity, and Inclusion

While our organization has selected Equity, Diversity, and Inclusion as one of our core values, in many ways this value remains an aspirational value rather than one currently ingrained in our culture at MLS. This value having been chosen as one of our core values for the first time in our history speaks to the fact that, as an organization, we recognized a need for and path towards E.D.I. We feel that the people of Metro are our strongest assets in achieving this goal, as those who seek to work in library service generally esteem the values of equity, diversity, and inclusion. However, being a large, established institution means that Metro inevitably has barriers in place that we will have to overcome in our efforts to live out this value.

Over the course of this project, the LEAP team conducted surveys to assess the current state of E.D.I. in the library system. We received over one hundred responses from across the system from all levels of staff. Based on the survey data, we have identified the following barriers to equity, diversity, and inclusion: investment in maintaining the status quo, the library system being averse to perceived risk, a lack of understanding of the issue, and barriers to access.

Barriers to Equity, Diversity, and Inclusion

Maintaining the Status Quo

- Staff is currently mostly white, able-bodied, and straight, especially in management and above.
- Leadership mostly looks alike.
- Many believe E.D.I. will be difficult for MLS to carry out.
- We seem to have trouble challenging the status quo and being a leader in the library world.

The Library System is Risk Averse

- “We need to try radically different approaches to what we have been doing.”
- “I believe there are people in key positions in the system who are simply uninterested in EDI, or who don't have any interest in learning about it. It requires a lot of humility and willingness to be wrong, especially from people with privilege. I don't know if MLS will have the courage “correct” those people or explain to them that EDI isn't optional or a special interest topic.”
- “It feels like we are using these words because they are important in life right now, not because they are things we actively practice. Our staff is not very diverse. You can't even get hired here for most positions without degrees. If you want to be diverse, equal and inclusive, reflect that in the staff. Hire people who reflect communities we serve. Reach out to that community to make them feel included. Bring in programs, speakers, books, sources that promote these things. Promote them in our communities. Take a stand, and mean it. Don't just throw these words into our core values in an effort to make us feel better about it.”

Lack of Understanding of the Issue

- Staff think E.D.I. training is necessary.
- It is hard to apply without proper definitions of this value.
- Some staff feel we already do a good enough job in this area, and don't recognize the work that we have left to do.

Barriers to Library Access

- Economic factors that create concerns about or inability to pay late fees and damage fines
- Lack of transportation
- Physical Limitations

Bridges to Equity, Diversity, and Inclusion

When assigned this project, we were encouraged to dream big and consider what we would create if time and money were not factors. We present these big ideas with the understanding that time and money are indeed factors and thus they cannot all be implemented immediately. However, we present only ideas that, to the best of our knowledge and understanding, could be implemented in the not-so-distant future with enough planning and resourcefulness, that we feel balance our imperative to remain a sustainable enterprise with our mission to connect our communities with library resources, and that will give both staff and our customers a true sense of belonging at the library.

Changing Our Mindset About E.D.I.

- Frame of Mind
 - Each element of E.D.I. works in tandem to create belonging. You cannot achieve this with anyone or two elements alone.
 - E.D.I. is not something that can be finished or checked off a list. It is a continuous process that needs to adapt and change with the times.
 - Fear has no place in the realm of E.D.I. We must be courageous in our efforts to make meaningful changes. Pushback is a natural result of this process, but it should not hinder our efforts.
 - For example, as a system we have not been allowed to offer Drag Queen Storytimes. While it is true that this type of programming may be seen as controversial to some, it is necessary for us to take the risk of offering it because of the need it fills in diverse programming.
 - Quid Pro Quo is not the same thing as equity.
 - If we have a Black Lives Matter Display, we must have a Blue Lives Matter Display. This is a false dichotomy that is a roadblock to diversity.

- Trainings
 - All staff should understand their own implicit biases so that they can manage them at work.
 - Implicit bias tests such as the ones created by Harvard should be strongly recommended to be taken by all staff. This is similar to what was done with the Strengths Finder analysis. Discussions about results can take place during 1:1s and be incorporated into professional development.
 - Implicit bias training should be provided to all staff in tandem with the implicit bias tests.
 - Certain trainings should be made mandatory.
 - Managers should be required to attend yearly diversity management trainings so that they can learn how to cultivate and manage diverse teams.
 - All in-house and contract security should be required to attend sensitivity, crisis intervention training (CIT), de-escalation, and trauma-informed trainings so that they can better assist staff and our communities in the library.
 - Many trainings, such as CIT can be taken for free from the local police department.
 - All staff should be required to attend cultural sensitivity trainings so that they can better serve our diverse patronage and create appropriate programming that is culturally sensitive and appreciative instead of appropriative.
 - Staff should be encouraged to attend trainings that can increase E.D.I.
 - Classes or trainings like ASL, Trauma-informed care, Spanish, diversity awareness, etc. should be an automatic “yes” and built into the system’s course catalog.
 - Extra efforts should be made to provide employees from minority populations with professional development opportunities so that they can have the same chance of success as non-minority staff.
- Taking steps to be more inclusive of transgender and gender non-conforming staff and customers.
 - MLS asks all new hires if they would like to include their personal gender pronouns (she, he, ze, they, etc.) in their “Welcome to the Library” bio, and all staff have the opportunity to add their pronouns to their nametags and into the staff directory.
 - Additionally, Metro could provide personal pronoun pins to staff who would like them.
 - This gives transgender and gender non-conforming staff an opportunity to voice their gender identity and allows other staff an opportunity to show allyship.
 - Staff will be expected to respect the use of their coworker’s pronouns.
 - The intention is that the practice of asking and using correct pronouns will help transgender and gender non-conforming staff, who are largely marginalized in society, feel that they are seen and valued at Metro.

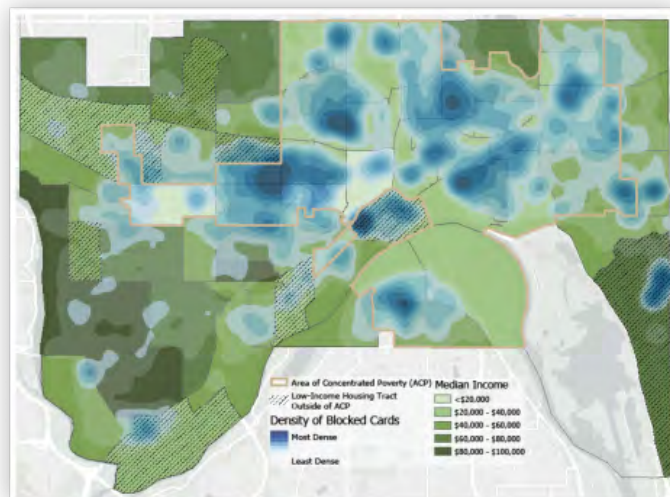
- Take a different approach to specifying customers' genders.
 - Ask all customers if they would like to share their pronouns and prefix or honorific (Ms., Mrs., Mr., Mx.)—with the understanding that this information will be entered into our ILS, and likely used when we contact them.
 - Gender options (currently: FEMALE, MALE, NOT AVAILABLE) should be expanded to include “non-binary,” “other,” replaced with a text form, or removed entirely.
 - Staff will be expected to use customer’s personal gender pronouns and correct honorifics, whenever applicable.
 - The intention is that this practice will help us avoiding mis-gendering customers and showing respect for our customers’ differences.
- In both instances, we should be clear that we may have to use this information during normal communications. We would not want to endanger staff or customers by unintentionally outing them to others, and steps should be taken to ensure that this would not occur.
- Task Force and Groups
 - Permanent E.D.I. Task Force
 - This group will consist of front-line, department, and administrative staff.
 - The majority of the task force will come from diverse populations.
 - Staff will rotate periodically so that the task force does not stagnate.
 - Avenues will be provided so that their recommendations can be reviewed or implemented.
 - Employee Resource Groups
 - Employee Resource groups will be created for front-line and department staff from diverse populations (BIPOC, LGBTQ+, etc.).
 - These groups will meet either virtually or in person.
 - The purpose of these groups is so that staff can share their experiences, seek support, bring up concerns, and otherwise just have a safe space.
 - Accountability Forum
 - Staff will have the opportunity to have their experiences posted anonymously to a digital forum that is available system-wide.
 - The purpose of this is to bring to light issues that staff are facing so that the system can be held accountable to fix the issues.
 - Focus Groups
 - Periodically, focus groups consisting of staff will be surveyed to assess the state of E.D.I. in the system.
 - Yearly, representatives of various community organizations will be asked to audit or walk through our locations and then form focus groups so that they can be surveyed to see how we are doing with E.D.I. and how we can improve.

- Resources aligned with our diverse communities
 - Library collection including a wider variety of languages and offerings
 - There is a need for more materials in languages other than English, including Spanish, Vietnamese, Native American languages, Chinese, and German, among others. (See Resource 4)
 - By not providing enough materials in these languages, we are not accessible to many potential customers.
 - Even for customers that are fluent in English, by not providing materials in their native or ancestral tongue, or in a language that a customer is learning, we are missing an opportunity to educate and enrich.
 - Resource centers for our diverse communities
 - Dedicated resource centers much like special collections that we have now, but expanded to enrich lives through more than just providing materials, and to provide resources for more minority groups.
 - See Tulsa's resource centers for a local example. (See Resource 5)

Reducing Barriers to Access

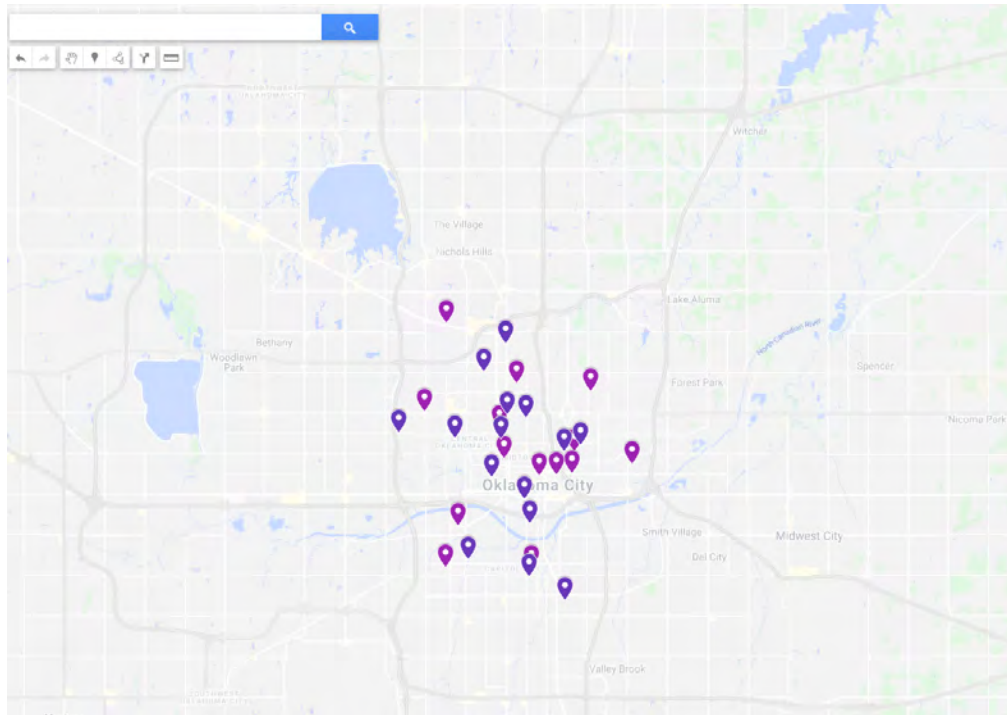
For many customers in our service area, economic factors present a major barrier to accessing library services. There seems to be a large discrepancy in the amount of fines and fees that are billed, versus the revenue that comes in from these items each year. For example, from the period June 2018 - Oct 2020, items that were charged as lost brought in about \$83,000 in payments, compared to about \$1.7 million left outstanding from that period. Thus, our current practices seem to result in a disparate number of blocked accounts versus the benefit in revenue.

While Saint Paul Public Libraries considered going completely fine-free, they found that blocked accounts in their service area were concentrated in lower-earning areas of their community. About 17% of Oklahoma County residents live below the poverty level, while that rate is up to 40% in some Oklahoma City zip codes. With this in mind, it is important that we further investigate how these economic barriers factor into library services reaching our communities.

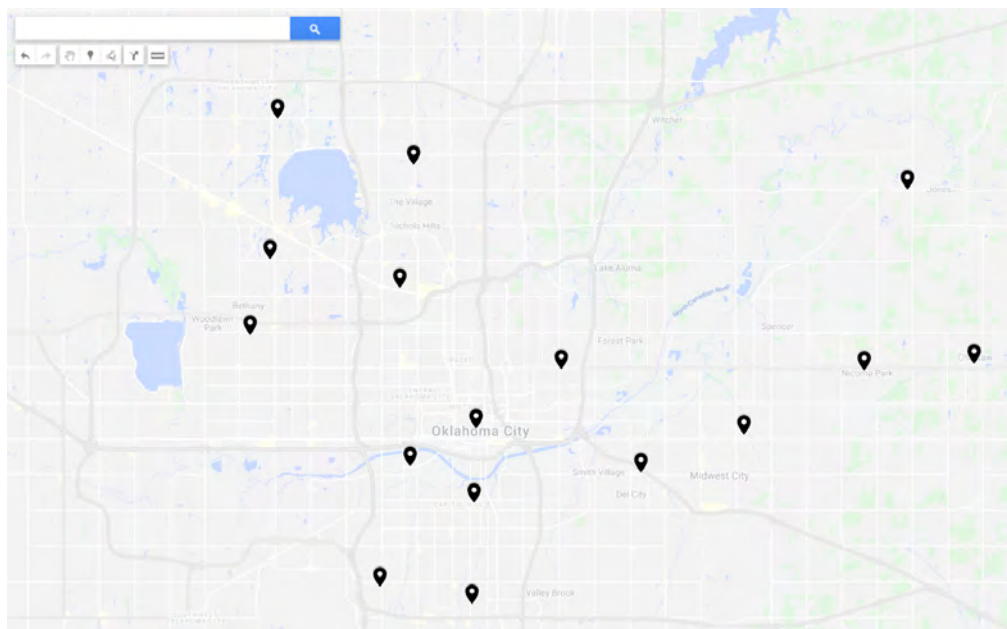


Concentration of blocked cards in Saint Paul, MN, courtesy of SPPL.org

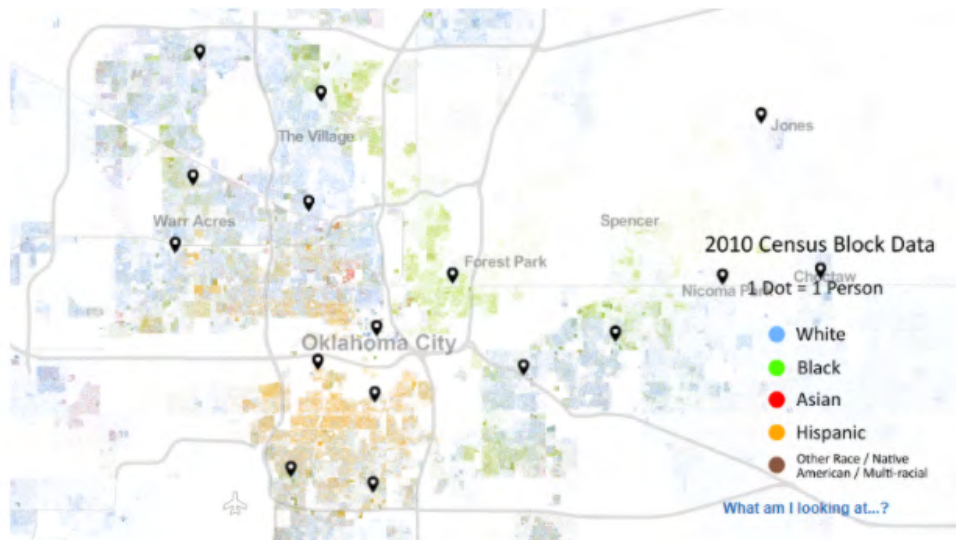
Distance from a library, lack of transportation, and physical ability are huge barriers to accessing library services for many residents who live in our service area. Below are maps of historical and current library locations, and population density in OKC. While we have expanded to serve a larger area, we have moved away from the core of the city, essentially creating book deserts in highly populated and lower-earning areas. Many in these areas have low access to books in their homes and lack transportation to visit libraries.



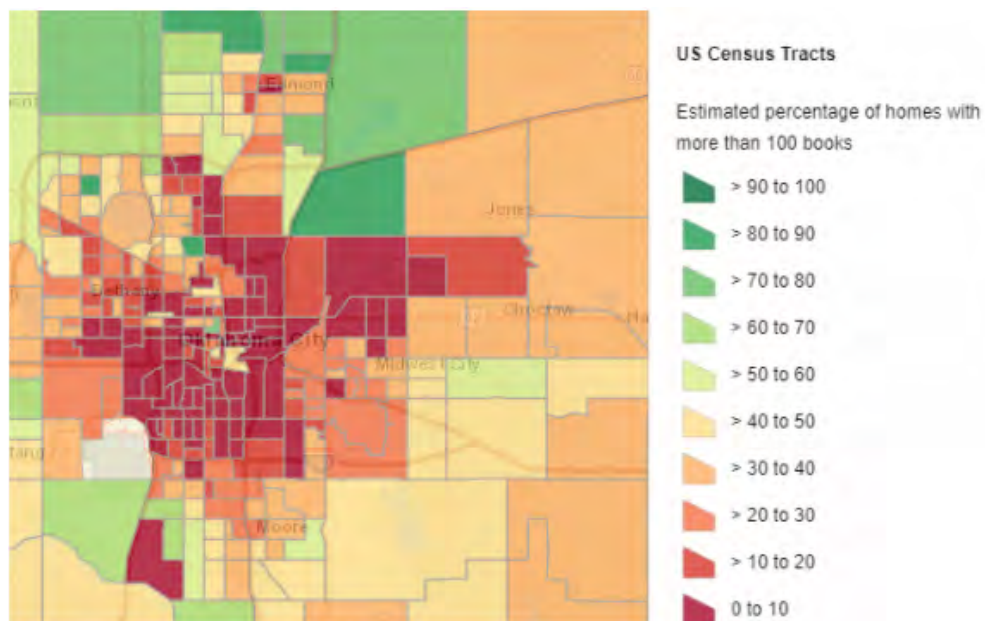
Pre-MLS library locations courtesy of Buddy Johnson



Current MLS location (minus Edmond, Harrah, Luther), courtesy of Buddy Johnson



Most current locations overlaid on OK County population density, adapted from racialdotmap.com

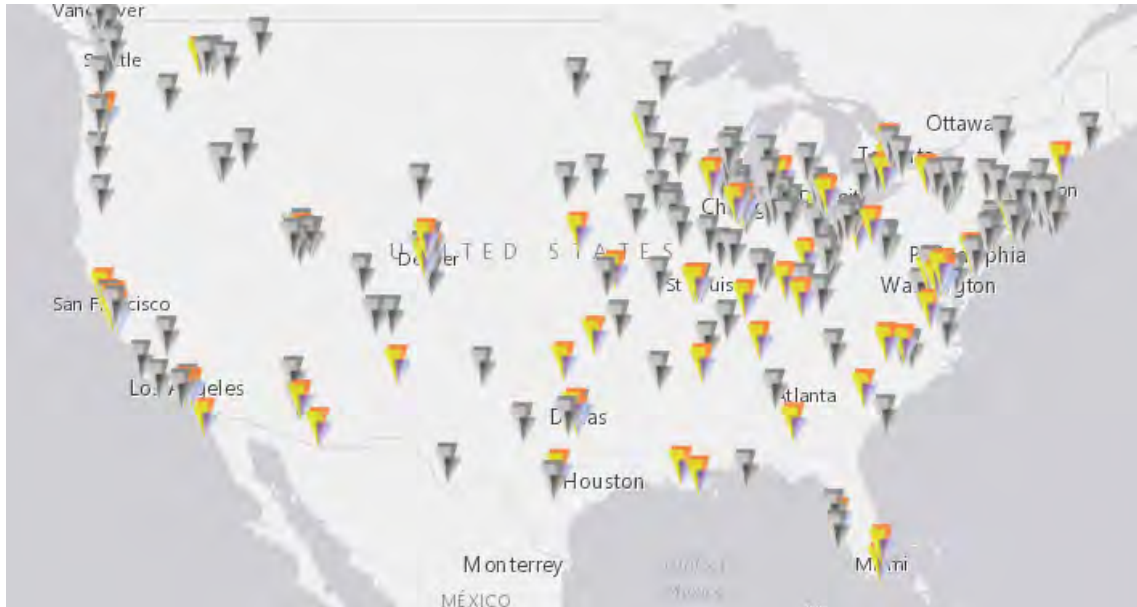


Book deserts based on number of books in homes courtesy of uniteforliteracy.com

- We recommend that MLS focus on the immediate need to add locations in under-served areas of Oklahoma County, taking into account not only distance, but transportation and literacy needs.
 - We recommend reviving the concept of Book Mobiles both as a stopgap while creating more locations and as a continuing means of reaching new and infrequent customers in our communities.

- Each account will have up to 3 Damaged or Lost item incidents that will be forgiven in a 12-month period.
 - A single incident includes any items forgiven in a 24-hour period, similarly to the Claims Never Had process.
 - After the three incidents, fees can still be waived or cancelled on a case-by-case basis, as usual.
 - This is an effort to provide more equitable access to library materials. For many of our customers, a single \$25 damage fee is enough to keep them away from the library for years, whether they pay the fee or not.
 - “If the library does not charge for the damaged book, it loses about \$25.00. When the library fails to recognize situations where charging replacement costs means losing library patrons, it loses the opportunity to participate in the life of the patron and patron's family. By choosing to make a \$25 replacement cost more significant than the role the institution can play in the social, developmental, and community life of the family, the library forfeits its role as a community and literacy advocate and leader. It will cost the library more than \$25.00 to convince this mother to return to the library. It will cost the library more than \$25.00 to persuade this mother that the library is a welcoming community place willing to mount literacy programs aimed at her children, who will not benefit from regular library visits and programs. And when these children are adults, it will cost the library more than \$25.00 to convince them that the library is a welcoming and supportive place for their children (DeFaveri, 2005, para. 20-22).” (See Resource 8).
 - While we currently have discretion to waive fees, many staff feel uncomfortable doing so. For major incidents, such as damage to home or vehicles, robberies, or displacement due to domestic abuse, we often ask for some kind of documentation, which many customers do not have. Having this process in place would help to remove individual biases and concerns from the determination process.
 - If a customer is found to be abusing this process, we still have recourse under the Rules of Conduct.
 - To the best of our understanding, in FY19, lost items brought in about \$36,000 in paid fees, with about \$750,000 left outstanding at the end of the fiscal year. In the same fiscal year, damaged items brought in about \$17,000, with \$23,000 outstanding.
- Going completely fine free
 - Many case studies show that removing late fines has little to no impact on return dates or return rates.
 - Removing late fines accounts for customers' differing circumstances, including transportation and health among others.
 - We feel that the practice of charging late fines creates barriers that are not in keeping with our mission.
 - Saint Paul Public Library posits that late fines are an unsustainable source of revenue as libraries increase their percentage of digital items, which do not accrue fines

- See Saint Paul Public Library's website for more reasons they went fine free and the effects of doing so (See Resource 9).
- Tulsa City-County Library recently went fine free as a response to the economic tolls of the pandemic, a move they have chosen to make permanent.



Libraries that have gone completely or partially fine-free, courtesy of urbanlibraries.org (See Resource 10)

- Setting a cap on item replacement costs for different categories (i.e. TNF books could max out at \$10). This information would be available on our website, to be more transparent about replacement costs.
- Increasing access for blocked accounts
 - Allow more overrides.
 - Create a built-in system for account payment plans so that managers don't have to be involved during each visit.
 - Manager would enter in the amount to be paid each time for the account to automatically be reset from Overridden (Blocked w/Override in CarlConnect) to Over Threshold (Blocked in CarlConnect).
- Access to checking out physical and digital materials for customers who face homelessness and housing insecurity
 - These customers are a part of our community despite not having a permanent physical address.
 - AL 100: "...the Metropolitan Library System serves the entire Oklahoma County area plus all areas within the official Oklahoma City limits."
 - AL 200: "Individuals eligible for primary accounts must reside or own real estate within the service area..."

- We recommend a new account type that will allow for limited checkouts of physical items and full access to digital resources.
- Items to consider:
 - What would verification requirements be?
 - When registering to vote: can put shelter or park address or nearby street intersection.
 - “The 2020 Census counts people living outdoors and at other locations where they are known to sleep.”
 - Would likely limit the number of checkouts (ex: 2, 5, or 10 items).
 - Would possibly limit the types of materials that can be checked out, as with ONEcards
- What about customers who live out of service area and try to use this account type as a loophole? One, we have trust in our customers. Two, this account type will likely not be widely known outside of some areas and thus won’t be often abused. If we discover abuse of this account type, we have recourse under the Rules of Conduct.
- Marketing: spread the word to shelters and other related resources (soup kitchens, etc.). Make sure all staff are aware. Events to visit shelters, soup kitchens, and mobile food vans to sign people up for new cards (places that census-takers visit).
- See Berkeley Public Library’s “Easy Access Cards” (See Resource 11) for an example of implementation
- Bridging the digital divide by offering more technology options
 - We recommend expanding the availability of Chromebooks, iPads, and hotspots available for checkout.
 - Many of our resources are digital but aren’t easily accessible to customers who don’t own the necessary technology.
 - We feel this initiative would go a long way towards our library system staying relevant in an increasingly digital society.
 - We recommend offering an optional technology protection plan, if possible, that would cover damage or theft of technology. See Edmond Public School’s “Student Technology Protection Plan” as an example of implementation.
- Expanded Library By Mail criteria
- To include families who have family members with developmental disabilities, anyone with a physical disability or long-term illness, anyone who has a lack of transportation that makes visiting the library a challenge, and anyone who is considered high risk, especially for times that our community is in a state of emergency due to the threat of contagion

Hiring

- Recruiting
 - Actively recruit from diverse populations.
 - Work with OU to align our diversity recruitment efforts.
 - Post on ALA's diverse job boards (AILA, Black Caucus of ALA, Asian/Pacific ALA, etc.).
 - Work with local schools to host career days or have a table to speak about librarianship.
 - Post job notices on the library's bulletin boards so we can hire from within our communities.
 - Make applying more accessible.
 - Allow paper applications.
 - Provide alternatives to video interviews.
 - Remove possible bias from hiring.
 - Implement blind hiring practices.
 - Remove names from applications when pushed to hiring managers.
 - Studies have shown that implicit bias may be applied to names that are seen as being ethnic in origin (See Resource 12).
 - Use an alternative for video interviews.
 - Implicit biases among hiring panels may mean that qualified candidates may be scored lower based off looks.
 - Training
 - All managers and people that may be on hiring panels should be provided trainings on diversity hiring and how to avoid bias traps like that those that speak AAVE (African American Vernacular English) are not "professional" or that a candidate not meeting your eyes is a negative, when it could be a cultural or neurodiversity difference.
 - Diverse Hiring Panels
 - As much as possible, hiring panels should be diverse in nature. It has been proven that diverse hiring panels can help increase diversity in organizations (See Resource 13).
- Data Collection
 - The Human Resources Department will collect data to determine whether we typically have a diverse applicant pool and do not hire them or whether our applicant pool is not diverse at all.
 - Diversity questions will be asked on applications.
 - These questions will be optional, and it will be made clear that any information given will not have an impact on hiring.

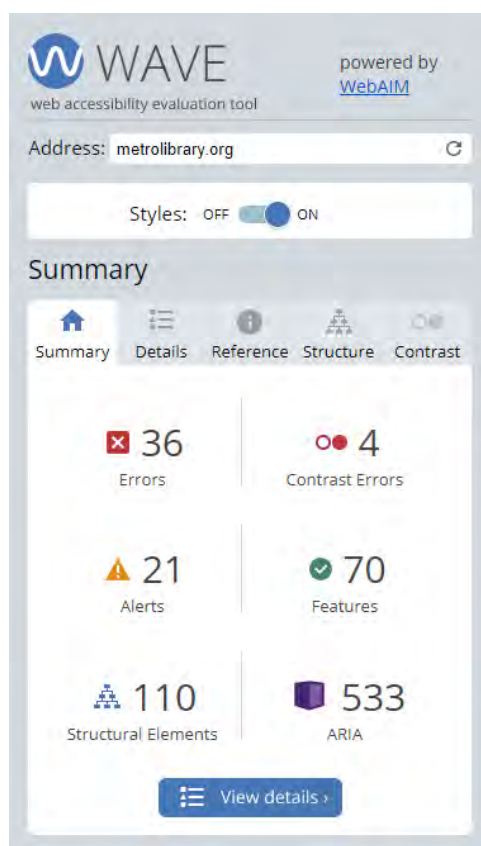
- If possible, have a way that these questions could be embedded in the application, like in a survey, but not be a part of the application so that they can stay anonymous.
 - Suggested phrasing- “In our efforts to increase equity, diversity, and inclusion within our organization, we are asking for demographic information. Providing this information is completely optional and anonymous. It will in no way be tied to your application nor effect the hiring process.”
- Human Resources will do a yearly audit to evaluate all data gathered to assess E.D.I. hiring practices.

Disability Inclusion

Our recommendations are that MLS conduct internal and external audits of various services, technology, practices, and physical spaces and takes steps to improve areas of need to ensure that we are providing the best possible experience for all customers, including those with disabilities.

Our recommendations include:

- Disability awareness training for all staff.
- Increasing Metrolibrary.org website accessibility, as our website is the first point of contact for many of our customers and should be structured with accessibility in mind.



- Seeking out and providing digital resources with accessibility features, providing information on our website about any accessibility tools that each digital resource has available, and expressing an interest in accessibility features to resources that solicit our feedback, as appropriate.
- Making technology more accessible to all customers, including obtaining technology and tools designed for people with disabilities.
 - Having TTY/TTD phones available for customers who are deaf or speech-impaired at each location with signs at public phones that these are available.
 - Vision assisting technology, a wider selection of audiobooks and alternative audiobook technology.
 - Having noise-reducing headphones for in-library use, especially for customers who are neurodiverse or sensitive to overstimulation.
 - Hearing loops in programs and at service points.
- Increasing program accessibility, including offering hearing loop technology and expanded ability to request and access interpretive services for library programs.
 - Offering more low-stimulation programming that would be beneficial to neurodiverse customers, especially for children.
 - Creating a database of volunteers who are willing to help with interpreting and translating.
- Staff are trained to use technology, features, and resources that are currently available to us and to customers on library and personal devices and that they are kept current on developments.
 - Examples include such tools as screen reading software and screen magnifiers on Microsoft, VoiceOver and zoom on Apple devices, how to access and use TRS to communicate by phone with customers who are deaf (including training in “Please, Don’t Hang Up”—See Resource 17).
 - Also, staff should have more knowledge of outside resources such as Oklahoma Library for the Blind and Physically Handicapped to refer customers to.
- Audit and improvement of library spaces to make sure they are physically accessible to and meet the needs of customers
 - Partner with organizations that serve these populations to conduct these audits.
 - Examples include having handicap accessible aisles and bathrooms in every library, and providing low-stimulation, private, sound-insulated quiet rooms, and the availability of which would particularly benefit neurodiverse customers and staff.
- Caregiver information denoted in adult patron info as access holders and staff having a better understanding of what privileges and limitations these access holders have.
 - This would allow us to provide better service to customers who have challenges that require a designated caregiver in their lives, such as those living in assisted care facilities or under a family member’s care.
 - Access holders could get account info, check out items for the customer, and make payments on the account.

- Access holders can be added after we receive the patron's permission or with proof of conservatorship or power of attorney. Access holders could be removed at the patron's request.
- Currently, we can write notes giving others permission to access account info, but notes are often missed or deleted.
- We feel that we cannot ethically add notes to account allowing access holders to limit the number or type of items that the adult patron can check out.

Conclusion

Our surveys showed that staff are excited about the addition of E.D.I. to our core values. However, it is apparent that MLS has much work to do to show staff that they really mean to embody the value. It is essential that the system takes continuous, concrete steps to prove to our staff and community that our adoption of E.D.I. is not merely performative. By changing our mindset, breaking down barriers to access, and leaning into providing more resources for our staff and communities, we can transform MLS into a place where everyone feels that they truly belong. We hope that the recommended solutions offered herein, can provide a solid foundation for the system's future E.D.I. efforts.

Acknowledgements

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December 2020

Creating a Culture of Innovation at MLS

Prepared by:
Daniel Chesney (WA) and Katherine Hickey (BI)

Executive Summary

Daniel Chesney (WA) and Katherine Hickey (BI) prepared this report as part of the LEAP 2020 program. We were charged with developing a plan to implement the new core value of innovation across the system. We surveyed staff about their perception of innovation at MLS and received 133 responses. This data was used to identify current barriers to innovation and propose solutions.

Current State of Innovation

Staff were largely divided in their perception of innovation at MLS:

43.6% of respondents agreed or strongly agreed with the statement “the library system fosters an environment where new ideas from all staff are welcomed and explored.”

56.4% of respondents agreed or strongly agreed with the statement “I am able to pitch innovative ideas and feel that they are heard and considered.”

They identified the following barriers to innovation:

Major Themes:

- Long chain to receive approval
- Lack of trust
- Risk-averse
- Lack of openness to new ideas

Minor Themes:

- Staffing Levels
- Rigid interpretation of job descriptions
- Budgeting and funding
- Absence of short- and long-term goals

Bridges to Innovation

We propose the following solutions to address these concerns:

- Clarify the chain of command and empower local managers to make decisions for their branch or department
- Develop a Metro philosophy of management based around the Core Values that is used to create a more uniform approach to management at all levels
- Shift from being data driven to data informed, allowing more room for the intuition and experiences of staff in decision making
- Create an Innovation Task Force responsible for receiving, triaging, and pushing ideas forward specifically tied to system goals
- Involve staff in decision-making, by creating ways for staff to offer feedback on drafts of proposed procedural and programming changes
- Foster a sense of psychological safety at work, where staff feel they can ask for help and celebrate failures without fear of repercussions
- Prioritize diverse professional development to give staff the ability to pursue new ideas
- Utilize cross-training and departmental collaboration to allow staff to develop beyond their job description
- Explore ways to improve the current approach to grant funds in order to maximize opportunity for flexibility, creativity, and access
- Complete a Community Needs Assessment and formulate short- and long-term goals for MLS in order to give staff a specific direction to channel their innovative efforts

Conclusion

Staff at MLS care about innovation, yet do not feel they have the proper tools at their disposal to live out this core value. By providing staff with clarity, focus, and a consistent and optimistic perspective on innovation, they will better be able to serve the needs of the community.

Proposed Definition of Innovation

You aren't held back by the status quo.

You are excited for the library to constantly improve and adapt.

You identify problems and propose solutions.

You help coworkers develop and implement their ideas.

You understand that not every idea is a winner.

Your ideas are informed by community feedback, intuition, and experiences.

Introduction

The current report was prepared by Daniel Chesney (WA) and Katherine Hickey (BI) as part of the LEAP program. It includes an assessment of the current climate towards innovation at all levels of MLS, an exploration of how other libraries cultivate innovation, and recommendations for the future.

In order to best assess the state of innovation at all levels of the organization, we sent out survey to all staff on 10/01/2020. We received 133 responses. Results from this survey are integrated throughout the report, and the quantitative data is summarized in the next section.

Current State of Innovation

The tables below present the survey data across all groups, and then broken down by category (department staff, frontline staff, supervisors, and upper management). The highest percentage in each column is highlighted in green. The findings are summarized at the end.

Across all groups (n=133):

	<i>The library system fosters an environment where new ideas from all staff are welcomed and explored</i>	<i>I am able to pitch innovative ideas and feel that they are heard and considered</i>
Strongly Agree	3.8%	6.8%
Agree	39.8%	49.6%
Disagree	29.3%	24.1%
Strongly Disagree	27.1%	16.5%
N/A	0%	3%
Average Score (1= SA, 4= SD)	2.79	2.53

Department Staff (n=21)

	<i>The library system fosters an environment where new ideas from all staff are welcomed and explored</i>	<i>I am able to pitch innovative ideas and feel that they are heard and considered</i>
Strongly Agree	9.5%	9.5%
Agree	19%	38%
Disagree	23.8%	23.8%
Strongly Disagree	47.6%	23.8%
N/A	0%	4.7%
Average Score (1= SA, 4= SD)	3.09	2.64

Frontline Staff (n=78)

	<i>The library system fosters an environment where new ideas from all staff are welcomed and explored</i>	<i>I am able to pitch innovative ideas and feel that they are heard and considered</i>
Strongly Agree	3.8%	6.4%
Agree	47.4%	53.8%
Disagree	24.3%	21.8%
Strongly Disagree	24.3%	14.1%
N/A	0%	3%
Average Score (1= SA, 4= SD)	2.69	2.46

Supervisors (n = 32)

	<i>The library system fosters an environment where new ideas from all staff are welcomed and explored</i>	<i>I am able to pitch innovative ideas and feel that they are heard and considered</i>	<i>I understand the extent of my authority to approve new ideas</i>
Strongly Agree	0%	6.2%	6.2%
Agree	37.5%	46.9%	59.4%
Disagree	40.6%	28.1%	9.4%
Strongly Disagree	18.7%	18.8%	25%
Average Score (1= SA, 4= SD)	2.84	2.54	2.54

Upper Management (n=2)

- The library system fosters an environment where new ideas from all staff are welcomed and explored: 100 % disagree
- I am able to pitch innovative ideas and feel that they are heard and considered: 50% agree, 50% disagree
- Supervisors: I understand the extent of my authority to approve new ideas. 100 % agree

According to the data, departmental staff disagree more with the statement “the library system fosters an environment where new ideas from all staff are welcomed and explored” and are more likely to report they are unable to pitch innovative ideas in their positions than frontline staff. Frontline staff feel the most positive about the library’s state of innovation and are the most likely to feel like they have the ability to pitch innovative ideas. Frontline staff are more likely than their managers to feel like their ideas are heard and considered. An open-ended question was asked on the survey, “How does MLS succeed at Innovation?” Going through the responses we identified the following common themes.

- Our response to COVID and new online programming and curbside services should be seen as a great success in Innovation, however it also reveals that when we are innovative, it is in a reactive response to a problem, not in a proactive focus on opportunities.

- We have innovative staff who are sometimes given opportunity at the local level to try out programs. If innovation is going to succeed, it is because there will be a strong champion for a program or initiative.
- Most innovation success seems to focus on library programming only. The library generally keeps up with library trends but does not stay at the forefront of services.

According to the 2018 Internal Culture Survey, Innovation was ranked in the bottom five weaknesses within MLS. In 2020, Innovation was announced as one of the newest core values. With half of staff reporting they do not feel confident pitching ideas, there is a significant gap between where the system is and where it is seeking to go.

Barriers to Innovation

We asked two additional open-ended questions on our survey, “What do you think are the current barriers to Innovation at MLS?” and “What other comments do you have about Innovation at MLS?” As we combed through our survey responses, common themes appeared in response to these questions. We have listed those major themes here with summary commentary as well as direct quotes from staff responses. Minor themes or those beyond the scope of this report are briefly listed at the end of this section.

We recognize that naming MLS’ problems from decades past through present day may generate feelings of disappointment or defensiveness. Remediating these problems feels like a gargantuan task, and in many ways it is. However, we find inspiration in the words of Fred Rogers who said “whatever is mentionable is manageable.” We believe that bringing these feelings and experiences out into the open and naming them, is the first step towards change. The intent is not to place blame or complain, but to identify areas of growth. Furthermore, this list of barriers is not intended to make generalizations about every department or branch. They reflect a collection of diverse experiences.

Long Chain of Approval

The most cited barrier to Innovation from all levels was the long chain of approval required for even small programs or actions: “everything needs multiple levels of unnecessary approval and it kills ideas,” “frontline staff have been told ‘no,’ or ‘I’ll pass it up the chain’ so many times, they don’t want to be innovative or take a risk.” It also becomes clear that the **long chain of approval is poorly defined and not clear to neither frontline staff and local management**: “if your direct supervisor is willing to try something new, it gets lost in the layers above,” “we have no structured way for ideas to travel from the ranks into upper management,” “there is no clear path for submitting ideas for innovative services, and often ideas are brought to management only to be forgotten about soon after,” “frontline staff cannot directly get approval from people they need to, they must go through management.”

Closely tied in with this long chain of approval was the idea that **our strong focus on system coherence removed the ability for local innovation**: “greater centralization... sends the message that there’s less room or freedom for ‘grassroots’ innovation,” “if we all felt more empowered to innovate at a local level, then branch out, that could go a long way.” 35% of supervisors indicated in our survey that they did not understand the extent of their authority to approve new ideas. Many of our responses indicate that if managers do understand the extent of their authority, they know it to be very small: “local leaders do not have the ability to approve of new initiatives, everything has to be approved by administration,” “middle management does not have the authority to do anything.”

Lack of Trust

Frontline staff and local managers indicated that they are not trusted to do their jobs and make decisions that meet the needs of their communities and the library system: “branches are forced into a one size fits all model that does not take into account the differences in the communities served,” “upper management’s instinct is to slap down everything they find out about,” “don’t stick your neck out too far, it makes it easier for it to get cut off.” Staff keep ideas and suggestions to themselves out of fear of reprisal.

Staff do not feel trusted to be the experts in their own needs and daily job tasks, and indicated that **individuals with decision-making authority are too removed from the daily tasks and processes they are responsible for overseeing**: “you need to consult more with employees that are doing the down to earth contact with real customers. There is a wealth of ideas and information within us that is not given an outlet to be heard,” “often changes are made that affect frontline staff, without consulting frontline staff regarding the feasibility, or how it will impact their work which in turn impacts customer service,” “executives and upper management implement changes without having a thorough working knowledge of the daily challenges frontline staff are facing.”

When frontline staff are included in discussions there is a feeling that their ideas are often ignored: “the recommendations (of workgroups) are often changed significantly before being rolled out with no clear explanation as to why.

Lack of Openness to New Ideas

Staff do not feel ideas from all levels are recognized or encouraged: “the perception the system gives as a whole is that only management and upper management’s input are worthy of consideration.” Another staff member listed as a barrier to innovation, “not having the culture to listen and accept ideas from all levels of staff.”

In addition, staff indicated that when ideas are pitched they are quickly disregarded: “too many people (are involved) who see a potential hiccup and it derails the entire thing,” “the Metro tends to thwart the process in the early stages” “we traditionally have looked at 99 reasons why we shouldn’t do something versus the one reason it might be a huge success.” **Staff would like support for their ideas and for the rationale for decisions to be explained:** “if there is a weakness in the idea, it is set aside rather than workshopped to become a viable idea,” “there might be reasons for the no, but they aren’t always given,” “I’d rather see the system take more risks and learn from failures or coach employees on how to improve their proposal rather than simply turning down an idea completely.” In 2016, staff were encouraged to submit ideas for pilot projects. These projects were then ranked and prioritized. Out of the top 5 ranked projects, only 1 was implemented (mobile hotspots). “(MLS has) a history of squashed ideas.”

Risk Averse

Staff at all levels indicate that the system is unwilling to take risks: “MLS is the most risk-averse organization of which I’ve ever been apart,” “most of the time I feel like a problem bringing new ideas or wanting to try something different.” **Staff indicate that the system is unwilling to fail and does not celebrate the process of creating new ideas.** “Managers don’t want frontline staff to take risks because of fear of failure,” “(The system has an) unwillingness to fail. In order to try new things, we have to be willing to fail sometimes and learn and grow from those mistakes,” “we don’t celebrate ‘noble failures’ or give people a chance to innovate.”

Additional Themes

Staffing Levels: Staff indicated they feel a lack of time to pursue new ideas: “we program for the sure thing because time is limited,” “if you don’t have sufficient planning time to test and learn about a new program you are more likely to just offer something that you are familiar with.”

Job Descriptions: Staff felt their ability to grow as professionals and as a team was stunted by a close adherence to job descriptions: “insisting that people only play in the sandbox of their departmental role actively prohibits teamwork and professional development,” “grow all of your current staff, not just those with a fancy degree or long-term employees.”

Perceived Budget Constraints: Staff indicated limited funds make it difficult to try new ideas.

Clear Direction: Staff indicated that we need a focused agenda for where we want to innovate. “We need a plan to work towards the innovation of 1 or 2 things. We need to stick with that plan, demonstrate results and hold ourselves accountable for the successes and challenges.”

What Does Innovation in Libraries Look Like?

Because libraries exist to serve their communities, and communities' needs are in constant flux, libraries must be ready to adapt. Innovation and openness to change help ensure libraries remain relevant and funded. Innovation will not be identical throughout library systems, and even within local branches. We reviewed various publications and entities to glean their definition of innovation in libraries. Below is a list of commonly cited characteristics of innovative libraries grouped by theme:

Organizational Culture:

- Oriented towards public need
- Flexible approach to staff roles and duties
- Train staff to be culturally competent
- Avoid “innovation fatigue” by seeking solutions to real problems, instead of pursuing innovation for its own sake
- Perceive failure as a learning opportunity
- Create processes for staff to pitch new ideas, and allocate funds to implement them
- Have a plan to pilot and scale a project
- Solicit input and feedback from community members, for example in the form of a community advisory board to inform programming
- Design buildings that are oriented towards collaboration and creation

Programs and Services:

- Support children and teens' 21st century learning goals
- Create diverse and enjoyable learning experiences for adults
- Make new technology infrastructure available to bridge the digital divide
- Find new ways to market library services and recruit customers
- Adapt to customers' evolving needs and social environments
- Develop services to build skills among job seekers
- Create public workspaces for collaboration and brainstorming
- Offer a diverse range of materials and items to check out (hotspots, gardening supplies, software, etc.)
- Improve browsability of the collection by changing classification systems
- Provide outreach services in unexpected places (for example, at the laundromat)
- Engage in civic education and action
- Prioritize play as a critical part of early literacy
- Purchase tools and machines for customers to create Integrate STEM education into programs
- Connect with cultural institutions in the area to offer free passes for library customers

Equity, Diversity and Inclusion:

- Invest time and resources to meet the needs of underserved and/or underrepresented communities
- Champion physical and mental health among staff and customers
- Uses a collaborative system of service by having social workers and health professionals on site to meet customer needs.
- Adopt a trauma-informed mindset to deal with the increased challenges faced by library staff and customers.
- Strive to make services accessible to all regardless of ability or digital resources

Reviewed sources: Urban Libraries Council, The Knight Foundation, Public Library Journals, Pew Research , The Library Innovation Toolkit by ALA Publications, Institute of Museum and Library Services

Bridges to Innovation

This section contains a brainstorm of ideas informed by the survey responses and external research. We have grouped the solutions or “bridges” to Innovation according to the different barriers they work to overcome.

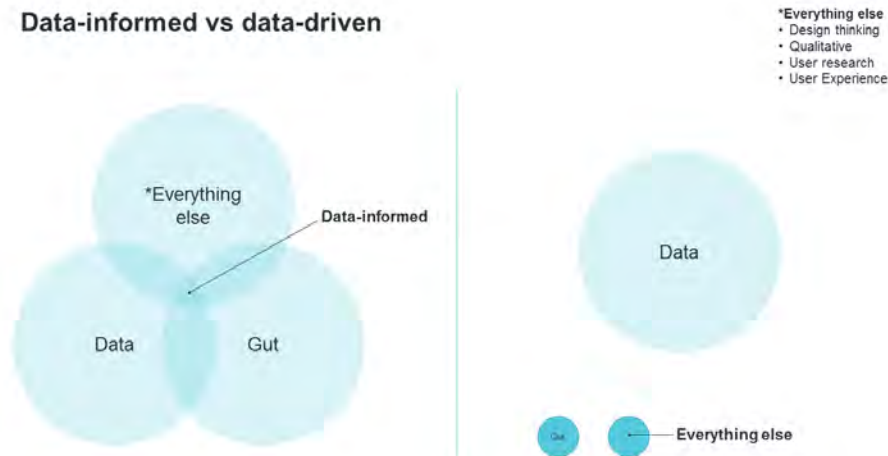
Long Chain of Approval

- *Clarify the Chain of Command:* Create a flow chart showing what ideas or processes need to be approved, and by whom, attempting to keep the flow as short as possible. Ideally, the chart would empower local managers as much as possible to make decisions for their branch or department.
- *Local Trial Projects:* Empower Library Managers with the ability to approve local trial projects that can be assessed by administration after a six-month period. This would allow branches to test out new ideas without waiting through a long approval process. Staff indicated in our survey that they felt like their ideas were often snuffed out, instead of developed and made stronger. If a branch has an idea of a project that can be implemented on the local level using limited monetary resources, they would be allowed to try it out and gather data on its effectiveness. This approach would work great for offering new programs, services, or re-arrangements to the collection. After and during the six month trial period the local manager would meet with their regional director and discuss how the trial went. Projects would then be canceled, continued, or pushed out to additional branches depending on their results. This would allow local branches to serve as small testing sites for new systemwide services or procedures.

- *Core Value Driven Management:* The relationship between direct report and supervisor is critical for innovation to occur. Currently MLS does not have any specific management style or philosophy, leading to an inconsistent experience for staff. Reviewing the Core Values and their focus on respect, integrity, and people first implies a servant leadership management style. It is important that the servant leadership model be developed and modeled by the leadership team and then taught to all levels of management, including new hires. Management has gone through a number of trainings over the years and received many different tools to work with; however we recommend identifying how these tools and trainings can be refined by the Core Values and used to develop a consistent experience for staff across the organization.

Lack of Trust

- *Shift from being Data-Driven to Data-Informed:* management experts identify a difference between being data-driven and data-informed. Data-driven organizations will only ever allow the data to be in the driver's seat. However, no data is perfect and can never fully capture the nuances of a situation. A data-informed approach utilizes data, intuition, and experience to make decisions.



Graphic borrowed from uxdesign.cc

We recognize that data is helpful and important, and the data collected from the new phase of the Community Needs Assessment will be particularly beneficial. A Community Needs Assessment was carried out in 2018 using existing data from various state agencies. In 2020, the Planning Department began the process of expanding its assessment to collect data directly from the public and community leaders. This process was put on hold due to the pandemic. Once this project is resumed and finalized, MLS will be well-positioned to better identify community needs and organization goals.

Still, it could possibly lead to a one-track mind that does not make room for spontaneity or creativity, especially considering that it will be a snapshot in time and could quickly become outdated. Therefore, at the tables (or Zoom rooms) where future decisions will be made, we hope to see a standardized process for making-decisions that takes into account the lived experiences and expertise of customers and staff. Below is an example of a data-informed decision-making process. At the “apply” stage, the data is integrated with other elements for the most precise and granular understanding possible. Making space for staff experiences to be taken into consideration and given weight is one way to build trust, in addition to sharpening our decision-making process.



Graphic borrowed from qlik.com

Here are some ways that MLS could move towards being more data-informed:

- Encourage Planning Department to form strong relationships with department and frontline staff, to better be able to contextualize data.
- Regularly and intentionally share data with all staff that is relevant to the organization's goals and outcomes, in a way that is easy to understand.
- When making decisions using data, reflect upon and consider the potential limitations of the data and how they may impact outcomes.

Lack of Openness to New Ideas

- *Innovation Task Force*: In addition to fostering a positive and open attitude towards innovation at the local level, we believe it is important for the system as a whole to have a forum for staff to share ideas and see them implemented. We propose the creation of an Innovation task force, composed of staff in various positions around the organization, charged with receiving, triaging, and pushing ideas forward specifically tied to system goals. We see the triaging role as valuable because a task force can easily create a bottleneck of ideas or become a form of gatekeeping. The task force could re-route good ideas to relevant departments or local teams if they do not meet the system's current goals or priorities. Therefore, it will be important for system short- and long-term goals to be identified and put in place before the task force could be assembled. This process would democratize innovation in addition to providing staff with new leadership skill development.

- *Involve staff in decision-making:* To render feedback on innovation accessible to all staff, we recommend posting on the Intranet drafts of procedural changes and new program ideas as part of the development stage. Staff would then be able to comment and bring up any concerns or additional ideas. All comments would receive a response from the team or group who posted the original document.
- *Re-assessment:* For each new initiative or idea, a timeline for check-ins with stake holders should be standard. Sharing the timeline widely is also a form of accountability. It is normal for some ideas to not take off. There are often legitimate reasons ideas cannot materialize. However, it is a lack of transparency around extenuating circumstances that can create suspicion and low morale. We hope to see more communication from Administration explaining why a project that had been started is now on hold.

Risk-averse

1. *Psychological Safety:* In researching innovation in organizations and reviewing survey data, the concept of psychological safety emerged as vitally important. The Harvard Business Review defines psychological safety as “the belief you won’t be punished when you make a mistake.” It allows for greater risk-taking, creativity, and curiosity. We believe addressing the lack of psychological safety is the number one area for improvement at MLS to foster a culture of innovation. Psychology safety is not a one-time practice. It manifests in a series of on-going commitments to making staff feel valued, heard, and safe to share feedback and mistakes.

Below are some practical ways to begin this process:

- Train managers and supervisors on developing a growth mindset and giving feedback, so that they can support their direct reports when they make mistakes.
- Encourage senior managers and upper administration to verbally commit to creating psychological safety. While we recognize that trust is earned not given, seeing a leader recognize shortcomings and commit to change is the first step towards reconciliation. This might include a video posted on the intranet, or a leader attending staff meetings.
- Assume good intent and recognize that shortcomings can be due to external circumstances. They do not always reflect poor performance by an employee. Integrating the language of “good intent” at all levels of management and supervision shifts the culture from fear to safety, as staff know their feedback and experience will be heard.
- Encourage all employees to write in their monthly 1-1s and yearly appraisals times that they attempted an idea, and it did not come to fruition.
- Recognizing the value of the process over the outcome communicates to staff mistakes and/or failures are normal and an important part of growth.
- Celebrate asking for help. Recognize in 1-1s when employees demonstrated honesty and need for additional support.

- Encourage upper management, managers and supervisors to model vulnerability by sharing and discussing their own mistakes.
- Hold ourselves and staff accountable in all situations (in meetings, during interview panels, etc.) when we witness behavior that implies retaliation for honesty.
- Identify and address the ways individuals from underrepresented groups may feel less psychologically safe in the organization. Micro-aggressions and lack of cultural literacy exacerbate unsafe environments.
- Work with Human Resources to communicate to staff MLS' approach to discipline and accountability. The unknown generates fear and anxiety.

2. Celebrate Successes and Failures:

- Distribute Innovation awards during Staff Day with financial rewards.
- Create branch or department "Fail Boards" to celebrate attempted projects.
- Let staff submit Fails and Wins to be recognized in the staff newsletter.
- Regularly start staff meetings with a discussion of recent failures and successes.
- Work to recognize every person who has helped an idea succeed. For example, when announcing a new initiative in email or on the intranet, make it common practice to have an acknowledgement section listing the name of every contributor.

Additional Themes

- **Professional Development:** Prioritize diverse professional development to give staff the ability to pursue new ideas. Paperwork and layers of approval are currently a barrier to professional development. Additionally, MLS does not have a history of encouraging staff to engage in professional development that is not directly library related. We recommend the following:
 1. Give direct supervisors the authority to approve PD requests for free events without needing branch/department manager or RD signature.
 2. Create pathways for staff to take classes to develop skills related to their job, such as learning Spanish, computer coding, or child development.
 3. Encourage staff to apply for city or county-based leadership programs such as "Loyal OKC."
 4. Encourage staff to apply for positions with local boards or chambers of commerce. This would expand opportunities for community outreach and partnerships.
- **Job Descriptions**
 1. *Recognize the Value of Cross Training:* To address staff's concern that they are limited by a strict interpretation of their job description, we recommend creating a culture where cross-training is valued and normalized. In addition to being beneficial to innovation, it also helps develop internal talent and opportunities for promotion. We believe that this process needs to be as simple as possible. An employee can discuss with their supervisor the desire to diversify their work experience and create a plan that can be documented in their monthly 1-1s. We hope to retire the sentence "that isn't in your job description" in exchange for "how can I help you get the experience you want, and use your talents to benefit the community?"

2. *Encourage collaboration between frontline and departments to implement ideas:* Due to the strict interpretation of job duties, frontline and department staff rarely have opportunities to spearhead the system-level ideas they suggest. We recommend at least one frontline or department staff member be involved in the development of any system-wide initiative. Furthermore, if a staff member pitches an idea, it should be standard for them to be involved in its implementation.
- **Perceived Budget Constraints:** The absence of long- and short-term goals make it difficult to have a cohesive and shared understanding of funding priorities across departments. This may be contributing to staff's perception of budget constraints. Once these goals are identified, there will be an opportunity to work through the following questions:
 - a. What kinds of projects fit within MLS' goals and merit funding, and of what kind?
 - b. Can the current approach to using operational vs. grant funds be improved to maximize opportunity for flexibility, creativity, and access?
 - c. How will project success be measured?
 - d. What are the best tools and communication strategies to generate enthusiasm about funding opportunities among staff?
- **Clear Direction:** Give staff goals to focus their innovative efforts.
 1. *Complete the Community Needs Assessment:* Innovation that is not informed by community feedback will not be successful. As one survey respondent wrote: "we need to be conscious of our strategic direction...Innovation without boundaries can lead us astray (distract us) from where we're trying to go." We need to prioritize completing the community needs assessment and then disseminating that information out to staff at all levels.
 2. *Create Specific System Goals:* The system should identify a small number of specific goals and then create avenues for staff to brainstorm solutions and be able to apply to help implement those ideas.

Conclusion

The survey administered in October 2020 revealed a high level of interest and excitement among staff around the topic of innovation. Respondents wrote long, thoughtful paragraphs expressing their desire to see MLS become an innovative organization. They also wrote honestly about their skepticism and lack of trust. With this in mind, we hope the readers of this report will be inspired by the challenge of shifting MLS' culture and language around this core value. When staff feel empowered to risk and fail, to brainstorm ideas, and have avenues to share them, all benefit: the team, the organization, and most importantly, the community.

Recognition

We wish to thank Kellie Delaney, Buddy Johnson, Risa Jensen-Jones, Heather Zeoli, Meg Hunt, and Jessica Gonzalez for their feedback on sections of this report. We are also grateful for all of the staff members who took the time to share their perspective and ideas in our survey.

December 2020

Putting People First

Prepared by:
Tim Spindle (CIS) and Mary West (CL)

Executive Summary - People First

Tim Spindle (CIS) and Mary West (CL) prepared this report as part of our involvement in the 2020 LEAP program with the Metropolitan Library System (Metro).

In analyzing the feedback received in the staff surveys conducted as part of the larger group project, **40% of staff reported that they were most enthusiastic about implementing People First** as a core value. However, 13% reported feeling confused as to what People First means as a core value, and **they do not know what the expectations or guidelines are for living it out.**

Our goal in this report is to provide an explanation of what we consider the People First value to be, and to provide suggestions, strategies, and ideas for how this value can be implemented across the system.

Goal 1: Customers feel valued and appreciated in all aspects of the customer experience

- **Strategy 1.1:** Staff draw upon shared resources and tools to deliver outstanding customer service
 - **Tactic 1.1.1:** Create a set of yes-based customer service standards
 - **Tactic 1.1.2:** Create a Customer Obstacles Log
- **Strategy 1.2:** Identify and correct customer service obstacles
 - **Tactic 1.2.1:** Evaluate service hours
 - **Tactic 1.2.2:** Hire a social worker to connect customers and staff with community resources
 - **Tactic 1.2.3:** Eliminate fines for all materials
 - **Tactic 1.2.4:** Enable automatic renewals of titles
 - **Tactic 1.2.5:** Provide funding to add notary services at every library branch
 - **Tactic 1.2.6:** Improve accessibility to our digital services and collections

Goal 2: Staff development is prioritized and staff are recognized for their work

- **Strategy 2.1:** Evaluate and prioritize staff development
 - **Tactic 2.1.1:** Encourage, equip, and expect supervisors to coach and develop their staff
 - **Tactic 2.1.2:** Survey staff to identify training needs
 - **Tactic 2.1.3:** Formalize a mentorship program for supervisors
- **Strategy 2.2:** Formalize cross-training and job shadowing
 - **Tactic 2.2.1:** Standardize and encourage cross-training
 - **Tactic 2.2.2:** Provide supervisory experience for non-supervisory staff
- **Strategy 2.3:** Incentivize staff recognition
 - **Tactic 2.3.1:** Create and incentivize annual awards for individuals and teams to recognize their work over the previous year
 - **Tactic 2.3.2:** Incentivize and rebrand what are currently called Beyond You Salutes

Proposed Definitions of People First

You assume best intentions.

You are empowered to think critically, independently,
and to make decisions that meet the needs of our
customers.

You seek what is best for customers, rather than what
is best for yourself or your group.

You make time to help colleagues.

You are eager to solve customer service challenges.

Introduction

Several surveys were conducted in 2020 to assess staff's familiarity with the new core values and mission statement at the Metropolitan Library System (Metro). In analyzing the responses, 40% of staff reported that they were most enthusiastic about implementing People First as a core value. However, 13% of respondents reported feeling confused as to what People First means as a core value, and they do not know what the expectations or guidelines are for living it out.

Our goal in this report is to provide an explanation of what we consider the People First value to be, and to provide suggestions, strategies, and ideas for how this value can be implemented across the system.

What Does People First Mean?

In November 2018, the results of an Internal Assessment Survey (IAS) taken by 253 staff and 5 commissioners were released. The survey adapted the OCAI Model to assess what type of organizational culture Metro currently had, and what type was preferred by staff.

Most respondents (62%) reported that our culture was either a *Hierarchical Culture* (37%) or a *Market Culture* (25%). In the same survey, respondents identified a *Clan Culture* (42%) and an *Adhocracy Culture* (26%) as the types of cultures to which we should transition.

- A *Hierarchical Culture* is a formalized and structured work environment in which procedures decide what people do and it values consistency and uniformity.
- A *Market Culture* is a results-based organization that highlights completing work and getting things done.
- A *Clan Culture* is a sociable working environment in which leaders are seen as mentors and the organization values development, empowerment, and team building.
- An *Adhocracy Culture* is energetic and creative, supporting risk-taking and valuing innovation.

While many things have changed in our organization since 2018, we believe these views are still largely held by staff, based on their responses to the surveys conducted in 2020. For Metro to fully embrace both the value of People First and our other core values, we recommend that the organization prioritize developing **people over process**.

What Does People First Mean? (cont.)

Focusing on people over process empowers and encourages staff to think critically, use good judgment, and assume best intentions in their day-to-day work. Staff are generally empowered and well-supported by management to deliver optimal customer service, and 90% of staff in 2018 responded that they felt that customer service was Metro's strongest area. However, part of the goal of this report is to ensure all staff are treated equitably in this area.

The mindset of people over process will also shift us closer to the highest preferred choice of *Clan Culture*. As the *Clan* and *Adhocracy* cultures also foster innovation and risk-taking, we believe that enacting People First in every aspect of the library will also provide support for our other core values.

Adopting this mindset does not mean a wholesale elimination of policies and procedures. Instead, we want to outline the benefits that come from working under a shared People First mindset that **emphasizes the people** involved in carrying out the processes.

We hope these suggestions provide a shared language and approach that empowers staff and delights customers, while still acknowledging and allowing for the unique needs of each library and department.

What Does People First Look Like?

One of the most common responses to the idea of People First as a core value has been a request for more information and a definition.

People are involved in every aspect of our jobs within the library, and nearly every role serves both internal and external customers, so staff are confused as to what exactly People First means for them.

This section outlines our proposed solutions and ideas for enacting a mindset which focuses on people over process. **Our customers are our highest priority**, as always, but **staff are our most important resource** – more than books, computers, or anything else we offer. Therefore, our suggestions are split into two sections – one focusing on customers, and one outlining how staff fits into the idea of People First.

We recognize that several of these objectives have previously been identified in Metro's 2018-2020 Strategic Plan, but our recommended strategies and tactics bring new ideas and push the value of people over process.

Customers

Goal 1: Customers feel valued and appreciated in all aspects of the customer experience

Strategy 1.1: *Staff draw upon shared resources and tools to deliver outstanding customer service*

Tactic 1.1.1: Create a set of yes-based customer service standards

- Metro has implemented several customer service training programs in the past decade: The Service Principles, METRO Way, What Would Marion Do?, etc.
 - These training programs, while filled with helpful content, are often forgotten by staff within weeks of completion. Our hope is that integrating a customer service model into our website and outlining the tools needed to continuously implement it will provide sustained and long-term success.
 - Jim Collins, author of *Good to Great*, describes this as the Flywheel effect, “in which no single defining action, no grand program, no one killer innovation” is the cause of a good-to-great transformation of an organization, but rather momentum is built through “relentlessly pushing a giant, heavy flywheel” until a breakthrough is reached. We hope that this model serves to help push the flywheel forward.
- The following service plan is based heavily on the Sacramento Public Library’s “Yes-Focused Customer Service Manifesto”, found in the book *Yes! On Demand* by Kathy L. Middleton.
 - We recommend that the Core Value Champions (see *Strategy 6.2 in the Core Value Recommendations document*) work alongside a group of selected managers to develop and carry out this plan, as this is a framework for a larger project and culture shift.

Metropolitan Library System – Customer Service Plan

Customer Service Goals

- To deliver personalized, individual, and unexpected service.
- To identify and remove customer obstacles.
- To equip staff to deliver a yes-focused experience.
- To empower staff to make independent decisions in favor of the customer.
- To value diversity in our customers and ourselves.

Customers

Metropolitan Library System – Customer Service Plan (cont.)

Creating a Culture of “Yes”

- All staff participate.
- Teach staff the why and spirit of procedures, not the letter of the law.
- Shift from dictating to customers what the “rules” are to what the customer wants.
- Encourage staff to think of creative ways to meet the customer’s needs.
- Leadership must buy in and be the first to model a “yes” culture.
- Leadership visits branches regularly and spends time with staff.
- Staff have a collective pride and commitment to achieving “yes”.
- Staff are encouraged to make judgment calls in favor of the customer without fear.
- Groups of staff from all levels will help review policies and procedures to find opportunities to enact the value of People First.

Train New Staff

- Each customer receives personalized service based on cues that prompt a custom solution.
- Staff work toward eliminating “no” by offering the customer choices and being aware of all options.
- New staff receive a variety of training – face-to-face, small-group, and one-to-one.
- Staff receive follow-up training after several months of employment.
- Training is consistently delivered.

Train All Existing Staff

- Staff are matched with needed training.
- All departments are expected to find “yes” solutions for internal and external customers.
- Supervisors are expected to lead, support, and empower staff to “own” customer service solutions.

Train Using Standards and Goals

- Identify and improve key areas that impact staff morale, knowledge, and confidence in delivering friendly and knowledgeable customer service
- Establish standards and goals for all staff to complete
- Evaluate training competencies using a checklist
- Provide enhanced training in the new hire’s specified position, shadowing the best of the best in their position and delivering follow-up training

Customers

Metropolitan Library System – Customer Service Plan (cont.)

Customer Service Standards

- Communicate the concept of “yes”-focused customer service to staff, managers, leadership, and all departments – this is a shift in thinking.
- Create Customer Service Standards to post on Metro’s website. See examples:
 - [Loudonville Public Library](http://loudonvillelibrary.org) (loudonvillelibrary.org)
 - [Jacksonville Public Library](http://jaxpubliclibrary.org) (jaxpubliclibrary.org)
 - [Duluth Public Library](http://duluthlibrary.org) (duluthlibrary.org)
 - [Somerville Public Library](http://somervillepubliclibrary.org) (somervillepubliclibrary.org)
 - [Massachusetts Library System](http://masslibsystem.org) (masslibsystem.org)

Outcomes

- Staff who work in an environment of trust are more apt to provide excellent customer service.
- Staff who are knowledgeable in all library services can provide personalized service.
- When the staff is happy, customers are happy.

Tactic 1.1.2: Create a Customer Obstacles Log

- Staff will be asked to notice and log sources of customer friction that result in a “no” response, as well as those that could have had a negative outcome if a staff member had not intervened.
 - Passive sources of friction may also be observed and noted, such as parking complaints, doors that are too heavy, or confusing library layouts.
- The log can take many forms, and may be decided by each department/location:
 - Intranet submissions (local and systemwide reports – similar to PITS or a dedicated message board)
 - Pen and paper at each service desk
 - Microsoft Form submission
 - Excel spreadsheet
- The log will place our customers’ experiences at the center of our awareness and increase staff sensitivity to them, while also providing a vehicle for continuous improvement.
 - Staff can discuss their observations in one-on-ones and staff meetings to brainstorm ideas and solutions to fix frustrations, which also supports the value of Innovation.

Customers

Strategy 1.2: Identify and correct customer service obstacles

Tactic 1.2.1: Evaluate service hours

- The Community Libraries' hours should be evaluated and analyzed, as Harrah, Jones, Luther, and Nicoma Park are largely bedroom communities (residential suburbs inhabited mainly by people who commute to a nearby city for work) where customers are not always able to reach the library within their current operating hours.
- Shifting operating hours around would prevent the need for additional funding and could be determined via the results of the community needs evaluation.

Tactic 1.2.2: Hire a social worker to connect customers and staff with community resources

- Many of Metro's customers face a combination of difficult social and economic issues, who would be well-served by hiring an expert in local community resources.
 - In 2020, the Point in Time count conducted by the Homeless Alliance found that over 1,500 people were experiencing homelessness in Oklahoma City.
 - As of 2019, Oklahoma City has a poverty rate of 15.2%, higher than the national average of 12.3%.
 - The national moratorium on evictions will expire at the end of 2020.
- The role of social services within the public library is becoming more pronounced. While librarians and engagement staff often serve in this role, hiring a dedicated social worker will allow them, as an expert, to connect individual customers with resources and to serve as partner and liaison between the library system and community partners.
- The social worker would have the ability to float around the library system to connect library staff with resources and training, and to form relationships with customers facing these hardships who visit our libraries.

Tactic 1.2.3: Eliminate fines for all materials

- Many of our peer libraries are working toward a fine-free model, including Tulsa Public Library, Multnomah County Library, St. Louis County Library, and others.
- The ALA issued a statement in 2012 that called upon libraries to recognize the importance of their role in the lives of people with low incomes, and they recommended "the removal of all barriers to library and information services, particularly fees and overdue charges" (para. 2).

Customers

Tactic 1.2.3: Eliminate fines for all materials (cont.)

- As of November 2020, there are 9022 library accounts that may be unblocked by removing late fines. However, many of these accounts have manual fines from when lost items were converted, and would therefore not be unblocked as a result of clearing all late fines.
 - While library fines are a “slap on the wrist” for middle-income families, they often present significant barriers to customers who would have to choose between paying their late fines or putting food on the table (Pogash, 2016).
 - The “discourse of fear” that also exists by the very existence of fines, “makes possible the magnification of such nominal fines into a brutish and terrible fear” of the “Library Police” (Radford & Radford, 2001).
- While Metro has made strides toward a fine-free model with the removal of fines on children’s materials in 2020, we recommend that serious consideration be given to the total removal of fines and fees.
 - As customers are the center of our focus, removing fines demonstrates their importance to us, and allows them the greatest range of access to all materials.

Tactic 1.2.4: Enable automatic renewals of titles

- We recommend that Metro Library enable the automatic renewal of eligible titles for customers and to notify customers (by text and/or email but not by mail) of titles that could or could not be renewed.
 - “Eligible” titles are physical titles that are not on hold for any other customers, and this feature would require the customer to have their account in good standing.
- Whether or not overdue fines are not eliminated in the future, enabling this option will feature could reduce the accrual of overdue fines by customers.

Tactic 1.2.5: Provide funding to add notary services at every library branch

- Staff are often asked about the availability of notary services within our libraries, but there is currently no official process for staff to provide this needed service.
 - Becoming a notary public in Oklahoma requires a \$25 application fee and a \$10 filing fee, as well as the purchase of a \$1,000 surety bond, which the National Notary Association sells for \$30.
 - In total, 19 staff members (one at every branch) becoming notaries once every four years would cost the library approximately \$1,235.
 - Customers could book appointments for simple notary services via our Book a Librarian service to ensure the staff members are not overloaded with requests.

Customers

Tactic 1.2.6: Improve accessibility to our digital services and collections

- Due to the community spread of COVID-19, we have had to modify our delivery of services, especially services delivered in-person. This has made having effective digital access points like the online catalog even more important.
 - In the catalog, there are limited records for our OverDrive collection and for our EBSCO eBook collection, and there are no records for many of our digital collections (like hoopla, Kanopy, and RBdigital) nor for our databases.
 - To make our digital services and collections more accessible via a single access point like the catalog, we recommend that their records be collected, consolidated, imported, and maintained in the catalog.

Staff

Goal 2: Staff development is prioritized and staff are recognized for their work

Strategy 2.1: *Evaluate and prioritize staff development*

Tactic 2.1.1: Encourage, equip, and expect supervisors to coach and develop their staff.

- We had planned to recommend prioritizing staff development with external training opportunities and internal training tools like Learning Paths so now we are pivoting to throw our support behind Learning and Development's addition of Learning Paths to support the core values.

Tactic 2.1.2: Survey staff to identify training needs.

- In addition to training needs met by the Learning Paths, staff should be surveyed to identify additional training needs for themselves, for their team/department/location, for their subordinates, and for their supervisor.

Tactic 2.1.3: Formalize a mentorship program for supervisors

- The organization should actively support and encourage supervisors across the system to volunteer to mentor new and current supervisors who wish to partner with a mentor. The length and frequency of mentorship can be determined by involved parties on a case-by-case basis. Establishing these relationships across the system will build community, set up new and current supervisors for success, and will better equip them to develop their staff.

Strategy 2.2: Formalize cross-training/job shadowing**Tactic 2.2.1: Standardize and encourage cross-training**

- We should develop standards to cross-train staff in a different position at a different branch/department and encourage all staff to cross-train. The cross-training experience will provide staff with a better understanding of the system as a whole and how the core values and mission can be carried out by different positions throughout the system.

Tactic 2.2.2: Provide supervisory experience for non-supervisory staff

- We should encourage non-supervisory staff to shadow a manager for a week and/or to rotate into an open supervisory position for a designated amount of time and with the active support of that position's manager and a designated mentor. This experience can educate staff about supervisory duties and equip them with the tools to succeed in a supervisory role.

Strategy 2.3: Incentivize staff recognition**Tactic 2.3.1: Create and incentivize annual awards for individuals and teams to recognize their work over the previous year**

- Suggestions to help structure this process:
 - A committee composed of staff across the system and across a variety of job titles evaluate the nominations.
 - Individual award winners receive public recognition of their work and an incentive (e.g. a bonus check and/or a bonus day of AVL).
 - Team award winners receive public recognition of their work.
 - Regional Directors and above are ineligible, except for team awards.

Tactic 2.3.2: Incentivize and rebrand what are currently called Beyond You Salutes.

- Attach a small incentive to Beyond You Salutes (e.g. a Metro-branded item, a \$5 gift card, a gift certificate, etc.). If the incentive were to be as expensive as a Metro-branded mask or shirt, it could be given out on a less frequent occurrence, e.g. a drawing on a monthly or quarterly basis.
- The "Beyond You Salutes" should be rebranded to reflect our current Core Values.

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December 2020

Growing a Foundation of Respect and Integrity at MLS

Prepared by: Carmen Stoneking (NW), Matthew
Cotter (IT) and Victoria Stephens (MAC)

Executive Summary

This report was prepared by Carmen Stoneking, Matthew Cotter and Victoria Stephens as part of the 2020 LEAP program. Tasked with communicating the new core values of respect and integrity, we conducted a survey of staff across the system to capture their views. We have used responses from the 2020 Internal Assessment and earlier MLS surveys, our individual experiences as MLS staff, internal surveys conducted by LEAP participants and research conducted evaluating the implementation of core values within workplaces across the country.

Current State of Respect and Integrity

Initial data relating to respect and integrity seems to show a lack of interest in these values. However, we know from earlier surveys and research in general that these two values are extremely important to people. In fact, respondents of the most recent survey conducted by LEAP said that “respect was the foundation for healthy relationships” and “if we have integrity, the other values will follow.” While we agree with those statements, it is important to have a shared understanding of what is meant by respect and integrity as there are many definitions. The “You” statements that follow highlight the more traditional aspects of these values. After analyzing the survey data and research conducted, we believe there are other aspects to be considered as we grow a culture of respect and integrity.

Barriers to Growth

- Frontline staff are not consulted on policies and procedures that affect their day-to-day roles in the library and feedback received is rarely acted upon.
- Poorly timed and ineffective communication
- Confidence is low in teams outside their own
- Management is not viewed as transparent or accountable Micromanagement signals no faith in ability

Recommendations for Growing Respect and Integrity

We offer the following strategies to address these concerns:

- Practice EDI internally, paying special attention to inclusion
- Create an empathy-based training plan for members of X-Change
- Implement employee recognition software to acknowledge work and celebrate contributions
- Establish a better reporting system for internal ethical issues and their resolution
- Conduct 360 Feedback
- Administer yearly internal cultural assessments
- Establish communication mechanisms for direct feedback across all levels of management
- Create cross-functional teams across departments / libraries to increase collaboration and awareness of work around the system

Conclusion

Respect and integrity are important topics that cannot be addressed with one report or in one sitting. Adopting these values might be a one-time event but allowing their importance to dictate the everyday interactions between MLS staff will take leadership initiative and shared commitment. Staff at all levels understand the importance of these values and we encourage those in leadership to use this document as a starting point for the important discussions to follow.

Proposed Definitions for Respect and Integrity

Respect

- You are thoughtful in your words and actions
- You are courteous to others
- You are considerate of the feelings and contributions of others and offer praise and encouragement to fellow co-workers
- You value the time and expertise of others, recognizing that exceptional work should never be thrown together in the final hour
- You participate constructively

Integrity

- You are known for candor, authenticity, transparency, and being non-political
- You only say things about fellow employees that you would say to their face
- You own your mistakes, apologize if necessary, and work to learn from them
- You treat people with respect regardless of their status or if they disagree with you
- You do not compromise your values to “fit in”

Introduction

As we look to implement new core values at the Metropolitan Library System, we must consider how respect and integrity affect the workplace. In a survey of nearly 20,000 employees, Harvard Business Review found that respondents ranked respect as the **most important leadership behavior** (Rogers, 2018). It does take a village to embed these values in organizational culture, and we will all need to work together as we adopt these new values, but we hope to highlight the importance of leadership's role in this process to solidify the change.

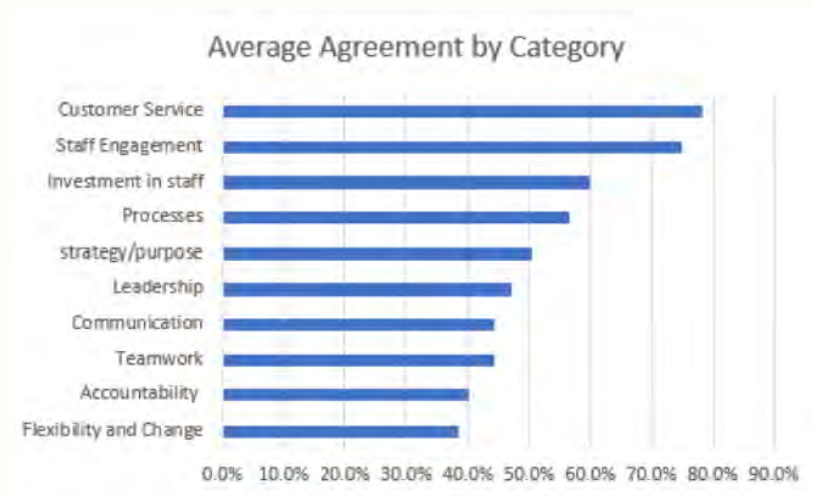
To better understand employee feelings about our current culture, several surveys were conducted at various levels within the organization. The responses were aggregated and at times summarized for simplicity and to protect the author. One more note as you read this report: while respect and integrity are two distinct values, each with their own complexity and depth, we have opted to report on them as one given their close associations with each other. Many of the recommendations supplied will further the adoption of both values and serve to simplify the process.

Current State

Much data relating to the culture at MLS (Metropolitan Library System) has been collected over the past several years. We do not intend to repeat what has already been found in other surveys. We will briefly highlight findings from those earlier reports and add the data received from surveys conducted by LEAP (Leader Engagement and Acceleration Program) to draw conclusions.

In the 2020 Internal Assessment, staff named trust and communication, elements essential to cultivating both respect and integrity in the workplace, as areas in need of improvement within MLS. Staff ranked the core value "Respect for Members and Each Other" lowest among all MLS core values (See Table 4.1). Additionally, "staff tended to rank the levels closest to them, their team, with the highest confidence and those most removed from them, Senior Management, with the lowest confidence."

Staff were asked to rank statements based on their agreement (See Table 1.1). Areas of agreement (or strengths) were related to “staff engagement, staff expertise, programs / services, and funding”. Areas where staff disagreed with the statements (or areas to improve) were “lack of vision, poor communication, accountability, strategy, and goals.” Note that each of the strengths named could be considered a customer-focused quality while each of the areas to improve was internally focused. Table 1.3 notes the greatest agreement from staff are again areas of external focus (customer service, staff engagement, investment in staff). Agreement falls considerably when moving to more internal aspects such as processes, communication, and accountability.



This finding repeats in later pages of the report. Areas of strength are generally customer facing while areas to improve are more internal in nature.

The 2020 Internal Assessment also compared current data with that obtained in 2009 as well as 2018 with some notable findings. First, “many of the statements that saw the largest decline” in agreement “from 2009 were related to strategy, direction, and vision.” We see a comparable decline in Management confidence rankings from 2018 to 2020. Second, as noted in Table 4.1, “our three highest scored Values in 2018 continued to rise, and our three lowest continued to drop.” Again, the areas of strength tend to be customer-focused (learning as enjoyment, freedom to learn, members first) while areas needing improvement are more internal (organizational development, respect, and integrity).



Surveys relating to these values were conducted by LEAP in 2020 to engage staff at all levels and receive feedback concerning their adoption. Below is a summary of comments made concerning respect and integrity. These are not ordered to reflect a specific department or library but instead present a general representation of staff below Library Management levels.

- “If you put respect first, everything after that will fall into place.”
- “Respect has always been difficult [with] MLS”; this feeling was picked up from coworkers
- Frontline staff do not feel respected by upper management. They are not included or consulted about new policies or procedures.
- Management needs to be transparent and integrity must extend to all levels of the organization.
- Integrity is foundational.
- The structure of our organization does not foster respect or honest communication.

Interviews were also held with Library Managers who were asked “What areas...present the biggest challenge in the adoption of these values?” The following summarized comments were given:

- Accountability. How do we hold staff at all levels accountable?
- Recognition and celebration of values. Are we rewarding those who champion these values?
- Staff engagement. Can we offer employees an opportunity to be involved in creating our culture in a meaningful way?
- Leadership buy-in. Do staff see upper management leading this process and honoring the values as well?
- Follow through. Be careful about asking questions where the answers do not intend to be implemented.

Senior Management Group was also interviewed with questions relating to barriers in adopting these values. The general takeaways were: (inferred from comments supplied and to generalize the statements)

- SMG believes they understand what the new mission statement and core values mean as well as how they apply to their position.
- There was diversity in which value they felt MLS would find difficult to implement. While some felt our organization was focused internally and should be more customer-centric, others felt there was much to do on the staff side in building a better customer service culture. EDI was also mentioned as an issue of respect in that we are not comfortable as an organization bringing together staff with different views and experiences to build a better “product”.
- SMG also expressed a lack of discussion surrounding the values and their implementation. A repeated theme was that more clarity is needed on the value definitions.

Importance of Respect and Integrity in the Workplace

A recent article in *Organizational Development Review* lays out a simple path for “Creating a Culture that Thrives”. The authors define “two pertinent aspects of culture: (1) content (values that drive the organization’s mission and purpose) and (2) structure (the landscape as to how culture emerges or manifests itself).” These two aspects are key in looking to the future.

With the adoption of a new mission statement and core values, we have entered the beginning stages of content creation. As discovered in earlier surveys, MLS struggles with defining a vision for the future and ensuring that all employees have clarity on how to achieve that vision. We acknowledge the primary cause for this is likely the many changes MLS has undergone over the past few years, both in operations and leadership. From the recent interview with the Senior Management Group, we found that not only are they excited about these new values, but they also see no barriers to their adoption. This is encouraging as we look to implement the “structure” of our culture.

The second aspect of culture according to the article is structure – or how culture appears in the organization. We would label this the “failure point” of earlier endeavors. To clarify, while the mission and values have “successfully” changed, the culture has never fully adopted any of them. We look to our leaders to answer the question, “Why?”

Here, we examine leadership’s role in organizational culture. In “Creating a Culture that Thrives”, the authors state that “Leaders emerge in organizations, groups, or teams in order to foster a vision, share values, and reach goals. Ultimately, the organizational culture reflects the values and norms established by the leader and teaches new employees [or old] to think in a similar manner. This is a very powerful connection...” This “Leadership connectivity is focused on relationship-oriented behaviors, those that...create a strong sense of inspiration and willingness to listen to each other, involve and analyze different points of view, and share in a group vision.” We believe this to be the missing piece; practical relationships built on mutual respect and integrity. (Practical in the sense they are formed through normal work-related functions.)

We think most people would agree that respect and integrity are important. We also know that these values are complex, and scores of excellent materials have been written on each. The question becomes, “Where should we focus our efforts to understand these values as they relate to MLS and how can we build a culture with these as the foundation?” Before we advance to the recommended solutions, we echo the authors’ points in “Creating a Culture that Thrives” as they speak to why these values are not yet normalized in our culture:

- As an organization, we may not be committed to the process.
 - Senior leaders must be fully engaged and lead by example.
- Those responsible for advancing the change do not have the characteristics needed.
 - Not every manager has the competencies needed to enhance work culture. We must find those with strengths in these areas and allow them to champion the process.

- Lack of psychological safety.
 - This topic is too large to address in the scope of this report, but we highly recommend SMG and Leadership Team study this further. “Freedom to speak, mutual respect, and no fear of retaliation were reported as the defining characteristics of psychological safety.”
- Respect and integrity, while understood at a basic level, are often overlooked in practice.
 - We pointed out in the Executive Summary that respect and integrity have many definitions. When we think of respect, we include actions such as speaking kindly to each other, not interrupting, hearing everyone out. With integrity, we generally think of honesty, ethics and doing the right thing. But there are many other actions that people equate with respect or integrity, especially in the workplace. Things like keeping shared spaces clean, helping when needed, effective communication, and not over-promising. The list could go on, but it is important to build relationships through effective communication so that colleagues know how the other defines these values.

Barriers to Growth

We repeat below a listing of those things named by staff as barriers to respect and integrity. It is important to note that while these are summaries of staff sentiment, they reveal what employees at MLS believe to be a lack of respect and integrity. The list should not be considered all-inclusive and we encourage leaders at all levels of the organization to engage with their teams on these important topics. We believe the answers given will lead to more specific solutions for that team.

- Frontline staff are not consulted on policies and procedures that affect their day-to-day roles in the library and feedback received is rarely acted upon.
- Poorly timed and ineffective communication
- Confidence is low in teams outside their own
- Management is not viewed as transparent or accountable
- Micromanagement signals no faith in ability

Recommended Solutions for Growing Respect and Integrity

Practice EDI internally, paying special attention to inclusion

Provide opportunities for all interested employees to participate in committees and task forces. Develop a plan to seek volunteers and try to involve a diverse cross-section of staff. While not every person can participate in every activity, provide a fair and equitable way to include interested staff in a part of the process. Including feedback sessions, posting progress on the intranet or other updates, can help ensure recommendations are well rounded and can involve others in the process.

This creates a culture of ongoing development for each employee. When focus is placed on building strengths and delegating tasks, each employee becomes more capable, trustworthy, and accountable to one another. Plus, by using a cross-section of staff, the volunteers are building relationships with staff from different departments.

Create an empathy-based training plan for members of X-Change

Promoting a culture of well-being and respect starts with having empathy. A 2020 State of Workplace Empathy Study by Businessolver found that the state of empathy has hindered, which makes it more interesting since this study was done before the Coronavirus pandemic. The study found that leaders were not displaying enough empathy. It found that "68% of employees say their organization is empathetic; 48% say organizations overall are empathetic." Both figures stand for the lowest rates of the past four years. The study also found that employees want to work for an empathetic organization. It stated that "83% would consider leaving their current organization for a similar role at a more empathetic organization."

One valuable way to promote empathy is to have X-Change take part in empathy training workshops or training coordinated by an outside specialist. This will include training in emotional intelligence and mindfulness. This training will improve our leaders' ability to interact with their staff and better understand those with whom they work. This understanding will improve employee morale and will help lower turnover.

Implement employee recognition software to acknowledge work and celebrate contributions

One example of showing respect is offering praise more often. Encouraging praise and recognition among employees and supervisors increases employee morale, produces better customer service, and lowers turnover. Send thank you cards to those who went above and beyond to supply quality customer service internally or externally. Encourage departments/libraries to have a recognition board so everyone can post a thank you to their colleagues and everyone can see the messages of praise. The recognition board is already popular among staff at Northwest library because it allows everyone the opportunity to give thanks to those who went the extra mile.

To best implement this, we suggest buying employee recognition software, such as Nectar (nectarhr.com), Kazoo (kazoohr.com) and Terry Berry (www.terryberry.com). Employee recognition software programs have the popular look and feel of social media sites that many staff are familiar with and deliver digital thank you through a peer-to peer recognition program, where tailored E-cards help bring company values front and center. Since they are social, everyone in the organization can view them and add reactions. They also offer a point system that can go towards rewards.

Establish a better reporting system for internal ethical issues and their resolution

Leadership and HR could better show transparency by giving employees data on ethical issues that have occurred within the Library system and supplying insight on the way it was handled. Companies such as Airbnb and Cisco issue regular reports and share with staff what happens when a claim is filed. The details of these events would not reveal anyone's identity, but it would show a commitment by leadership to solving problems and addressing those problems. If staff feel complaints are never addressed, acting with integrity by holding coworkers accountable will not be a priority.

Conduct 360 feedback

Staff identified that management is not viewed as accountable. One method to measure accountability among management is giving direct reports the ability to evaluate their managers as part of the manager's PD process. This type of evaluation is called 360-degree feedback. Consultants Jack Zenger and Joseph Folkman wrote in the Harvard Business Review, "There is one thing we've personally seen that profoundly and consistently changes lives—what's generally referred to as the 360-degree feedback process."

The 360-degree feedback provides the strengths and weaknesses of those individuals and provides an understanding of those areas that need further development. These insights will help develop the skills and behaviors we want in good managers. It will help managers improve their interactions, their communication, and their job performance.

Administer yearly internal cultural assessments

Internal assessments are essential for an organization. It makes them aware of what employees think about their work culture to improve on the areas shown to be a weakness in the organization and make it a better place to work. The cultural aspect of the workplace directly affects the organization. When leadership understands the importance of workplace culture and improves on them each year, the staff will feel heard and respected because leadership listens to their feedback.

Establish communication mechanisms for direct feedback across all levels of management

To develop an environment built on respect and integrity, it is essential that management supply consistent opportunities for staff to provide feedback, so they feel their voice is heard. Some effective feedback mechanisms may include the following:

- Staff Engagement Surveys – HR can conduct surveys at regular intervals that send out automatically to staff after the first 90 days, first year and every two years thereafter during their career at the library to gauge the organizations culture, performance and to receive new ideas. Survey results can be presented in Leadership Team each month.
- Pulse Surveys – Short 1-3 question surveys can go out to staff each month to continuously get staff feedback and help us develop an employee net promoter score.
- Suggestion Box – While anonymous feedback has been addressed as the less preferred option of staff communication, sometimes staff may be in a situation where they fear retribution and it's important for staff to feel safe in their working environment. Indeed, an online resource for employees and employers, wrote that suggestion boxes are known to improve employee morale, improve communication between management and staff and increase innovation and problem solving. The suggestion "box" could be a physical box or even a virtual box. A physical box could be placed at each location or a few locations (strategically placed so staff at other locations have easy access). Staff could drive up and slip in their paper feedback.
- Review Site Monitoring – The Communications Cabinet could monitor staff comments on sites like reddit, Glassdoor, CareerBliss, Indeed and others to further gauge staff's (or former staff member's) feedback about the organization. They can also respond to reviews, helping staff feel heard and further developing Metro's reputation as a good place to work.

Create cross-functional teams across departments / libraries to increase collaboration and awareness of work around the system

According to the 2020 Internal Assessment staff ranked levels to them the highest in confidence and those furthest from them the lowest. One way to build trust across the system is to build relationships and understand other departments. One way we can learn about each other is to have each department/library make a 5-minute video of who works in their department/library and what they do. The videos can be made by the staff or done with the help of the Marketing department. The videos will be posted monthly on the intranet and staff can post questions to that department/library. Getting familiar with each department /library will help staff see employees that they might never know, which will enhance company-wide team building.

Another possibility is to have staff shadow other departments and libraries. When we allow staff to visit other libraries or departments, they can see how different teams function and get a better understanding of how the library system works. It also allows those who visit those departments or libraries a new understanding and respect for the individuals and the functions that they shadowed.

Recognition

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Resources

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