



Equity, Diversity and Inclusion *Strategic Plan*

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PART ONE: LAYING THE FOUNDATION: BACKGROUND AND INITIAL EFFORTS

BACKGROUND

Forward / Overview

Southern Maryland Regional Library Association, Inc. (SMRLA) is committed to strengthening its organizational health, culture, and operations over the next three years. Equity, Diversity and Inclusion (EDI) is at the core of that commitment as SMRLA embraces its responsibility to create a more trusting and culturally competent environment that better aligns positive employee, customer, and community experience and addresses the population growth and changing demographic dimensions of the communities it serves.

SMRLA's EDI journey began under the executive sponsorship of Ashley Teagle, CEO and in 2022, SMRLA embarked on this EDI Initiative with its consulting partner, Loutel LLC. Below is a summary of SMRLA's efforts to date.

INITIAL EFFORTS

SMRLA continues to recognize that EDI is critical to achieving its overall organizational mission and has committed to invest in a clear, definitive EDI Initiative, effectuated through an EDI Strategic Plan (the Plan). The Plan will align with SMRLA's overall strategic objectives as set forth in its 2021-2026 Strategic Plan and includes support across SMRLA's communities in Calvert, Charles, and St. Mary's Counties.

For the first phase of the EDI Initiative and in preparation for development of the Plan, SMRLA:

1. Established an EDI Team¹ that is comprised of a cross-section of SMRLA leadership and employees.
2. Created an EDI Statement Committee (subgroup of EDI Team) and drafted a meaningful, organizational EDI Statement and EDI Tagline statement that can be utilized in a variety of ways to demonstrate SMRLA's commitment.
3. Created a Strategic Planning Committee (subgroup of the EDI team) and drafted a Plan (this document) to develop strategies and actions, provide governance, and drive the EDI Initiative, ensuring employees' voices are heard throughout the process and that there is continued, future success.
4. Supported efforts undertaken by other SMRLA partners: Calvert Library.
5. Utilized Loutel to complete a due diligence review of the current state of EDI including document and process review and review of Calvert, Charles, and St. Mary's County initiatives and efforts (captured in Director Council Minutes, Calvert efforts: Widerstand Diversity Audit, Anti-Racism Audit and Efforts, All Staff October EDI and Training, Equity Lens and Statement).

¹ Members of that team include: Ashlee Bass, Susan Grant, Jennifer Hopwood, Charles Spalding (EDI Statement Committee); Sarah Hibbits, Debra Phetteplace, Rachel Stein, Ashley Teagle, and Priscilla Thomas (EDI Strategic Planning Committee).

MISSION OF EDI INITIATIVE

SMRLA's EDI Initiative is intended to create an agile and responsive organization comprised of a diverse, inclusive, and empowered workforce that delivers superior performance to SMRLA's stakeholders – employees and Board, public libraries in Calvert, Charles, and St. Mary's Counties, and each of the Counties' external communities.

The EDI Initiative will drive SMRLA to raise awareness of and support for EDI throughout the organization through the development and embedding of equitable practices, transparent communication, experiences that build collaboration and belonging, education and learning, and investment in talent processes to create more equity, diversity and inclusion.

The Mission and Vision are captured throughout the SMRLA organization:

Mission

The citizens of Calvert, Charles, and St. Mary's Counties will have equal access to information through the efficient, economic, and effective sharing of resources among public libraries and all types of information agencies.

Vision

Advancing Library Excellence.

PROGRESS TO DATE

In an effort to proactively address existing opportunities and align with its Mission and Vision, SMRLA has successfully undertaken efforts to build a foundation to embed EDI throughout the organization, including the creation of a Statement of Diversity, Equity, Inclusion, Access and Belonging and an EDI Tagline Statement.

Statement of Diversity, Equity, Inclusion, Accessibility and Belonging

SMRLA believes our collective voices make us stronger. As the communities in Calvert, Charles and St. Mary's Counties change, our member libraries strive to be the fabric that maintains - and strengthens - the shared bonds among neighbors and citizens.

Our association is committed to diversity, equity, inclusion, accessibility and belonging as core values that are vital to our mission and our ability to serve all of our stakeholders now and for years to come.

We strive to create a space for our employees, volunteers and library workers to share their wealth of experiences and perspectives, while also providing resources for our members to respond to changes in communities that SMRLA members serve. SMRLA seeks to help our member libraries become hubs of belonging within their respective communities.

EDI Tagline Statement

Our association is committed to diversity, equity, inclusion, accessibility and belonging as core values that are vital to our mission and our ability to serve all of our stakeholders now and for years to come.

PART TWO: THE BUILDING BLOCKS - STRATEGIC PLAN

Through a collaborative process with the Strategic Planning Committee, four main areas of focus were prioritized: **(i) Strengthen Organizational Communication, Processes, and Trust, (ii) Cultivate Cultural Awareness that Supports EDI – Belonging, Inclusion and Respect, (iii) Increase Cultural Competency through Integration of Equity, Diversity and Inclusion Learning, and (iv) Invest in Talent Process to Create and Preserve a Diverse Workforce.**

Below is each Objective, specific Goal, the Actions to be deployed, and the respective Phase. More detail including tactical Action steps and Measures of Success are contained in the Full Strategic Planning Document previously provided. Phase(s) assigned to each action indicate when the action will be initially undertaken; it is the intent that once undertaken, respective actions will continue, mature, and be embedded into culture. It is important to note that SMRLA must live in each Phase and fully complete it before moving to the next Phase to ensure that actions are fully integrated and sustainable.

1. Objective One: Strengthen Organizational Communication, Processes, and Trust

Goal: Create better systems of communication, transparency, and trust within the organization and departments, more effectively communicate leadership commitment to EDI.

2. Objective Two: Cultivate Cultural Awareness that Supports EDI – Belonging, Inclusion and Respect

Goal: Create an infrastructure that supports and fosters a culture where people feel valued, collaborated with, supported, and able to fully be part of the organization.

3. Objective Three: Increase Cultural Competency through Integration of Equity, Diversity and Inclusion Learning

Goal: Embed EDI content, discussion, and educational opportunities throughout the organization

4. Objective Four: Invest in a Talent Process to Create and Preserve a Diverse Workforce

Goal: Identify, attract, and onboard a pipeline of talent for the organization and Board across diverse dimensions through more intentional and innovative outreach, recruitment, and hiring.

STRATEGIES

Objective One: Strengthen Organizational Communication, Processes, and Trust

Goal: Create better systems of communication, transparency, and trust within the organization and departments, more effectively communicate leadership commitment to EDI.

Strategy	Action	Phase
<p>1A. Identify and establish a communication method for SMRLA internal team</p>	<p>Select and put into place a communication method that will be used repeatedly to communicate information and updates to the internal SMRLA team.</p> <p>Continue to utilize chosen communication method for team communications. Goal is to utilize method so frequently, that the organizational behavior is shifted to utilize this method.</p>	<p>Phase I</p> <p>Phase II, III</p>
<p>1B. Develop communication plan for organization that supports both “outgoing” and “incoming” communication</p>	<p>Develop a communication plan. Plan should include: what information should be communicated; who should receive that information; when that information should be delivered; how the information is delivered; what communication will be shared; and how those communications will be tracked.</p> <p>Creation of Pulse Survey to gather valued input, feedback and perspectives from SMRLA staff. Questions to cover employee engagement and SMRLA culture.</p> <p>Pulse Survey data collection and analysis to be performed following Pulse Survey completion to establish SMRLA’s internal measures.</p> <p>Results can also be shared along with tools and practices with the wider SMRLA community.</p>	<p>Phase I</p> <p>Phase II</p> <p>Phase III</p>
<p>1C. Identify and invest in assessment mechanism to gather input and measure impact of EDI work</p>	<p>Identify a method to gain feedback and insight from the organization. The feedback and insight gathered will be used to measure the impact of EDI work, e.g., survey and input tool that permits scaled and open input [the Loutel VIBE Assessment Tool™].</p> <p>Share with the organization the interest and value in receiving their perspectives. Explain how their feedback is valued and meaningful to focusing EDI efforts.</p> <p>Include these efforts as part of the overall Communication Plan.</p>	<p>Phase I</p> <p>Phase II</p>

	<p>Design and launch first assessment to align with overall EDI goals and objectives as well as structure assessment to include scaled responses and open-ended questions.</p> <p>Communicate intentionally the value and need for response and input and create clarity in assessment launch; integrate assessment data into overall EDI plans and update as required.</p>	Phase III
<p>1D. Build on communication and transparency from the leadership team to deepen trust and create internal team communication process</p>	<p>Establish place for leadership and employees to learn about each other, connect, and collaborate on projects. In each of these connections:</p> <ul style="list-style-type: none"> - CEO to continue to hold one-on-one meetings to ensure team members continue to feel connected to and familiar with leadership (termed “One on One with CEO”). 	Phase I
	<p>Expand “One on One with CEO” Program to “One on One with Management members/team” to increase cross-departmental relationships and cross-functional work products.</p>	Phase II
	<p>Continue established key staff meetings at regular and frequent intervals with standing agenda to be in place. Integrate department head/manager updates to executive leadership and opportunities for individuals to present at Director Council or Board of Trustees meetings.</p>	Phase III
<p>1E. Communicate investment being made and instill importance of EDI focus, initiative, efforts and provide regular update on progress</p>	<p>Communicate EDI focus and initiative to all team members. Share: purpose and intent; value of focus; EDI Statement; overview of what will be doing in next 1, 2, 3 and 6 months to include and inculcate into organization.</p>	Phase I
	<p>Share EDI Statement and EDI Tagline with team along with communicating that team will be instituting “EDI/Culture moment” at meetings with 3 or more employees in attendance.</p>	Phase II, III
	<p>Continue to communicate EDI focus and initiative to all team members, provide update on focus for next 1, 2, 3 and 6 months to include and infuse into organization. Call out any asks, tasks, input or work product required.</p>	
<p>1F. Increase trust and authenticity throughout the community by investing in consistent communication processes and</p>	<p>Continued use of chosen communication method for all communications and ongoing investment in regularly scheduled All Staff Meetings.</p>	Phase I
	<p>Addition of Departmental Meetings and Cross-Functional Department Head/Manager Meetings to overall meeting cadence to ensure vertical and horizontal information and communication cascade.</p>	Phase II

<p>tools and ensuring consistent dissemination of information to overall organization, departments and individuals</p>	<p>Expand team meeting cadence and agenda processes to share with wider community, including Calvert, Charles, and St. Mary's County libraries, sharing approach that can help each of those communities to increase communication and trust within their own teams and among the wider SMRLA community.</p>	<p>Phase III</p>
<p>1G. Communication and sharing of EDI initiative and investment and best practice sharing with the wider SMRLA community - Calvert, Charles, and St. Mary's County teams</p>	<p>Build on trust with communities that SMRLA serves by sharing EDI Strategic Plan efforts.</p> <p>Focus of Phase I is to share SMRLA's EDI investment and efforts. At Director's Council, sharing what SMRLA is doing, what is coming next, how things are going.</p> <p>Continue to build trust with communities that SMRLA serves by sharing EDI Strategic Plan efforts and progress to date with Calvert, Charles, and St. Mary's County teams.</p> <p>Focus of Phase III is to be a regional resource for EDI. Creation of tool kit and opportunities to share practices and offer to help Calvert, Charles, and St. Mary's County teams on EDI tools and processes.</p>	<p>Phase I</p> <p>Phase II</p> <p>Phase III</p>

<p>3C. Support opportunities for Leadership/Managers/Board of Trustees education and coaching</p>	<p>In line with EDI Training Plan, identify EDI areas for training and coaching for Board of Trustees /Managers/Supervisors.</p> <p>Determine if more formal opportunities may be required to address and/or meet specialized leadership training and development needs such as individualized and cohort executive sessions or coaching focusing on specific areas.</p> <p>Share the collected content of training with tri-county community, with Calvert, Charles, and St. Mary’s County teams to strengthen the EDI ecosystem and collaboration between the teams.</p>	<p>Phase I</p> <p>Phase II, III</p>
<p>3D. Be recognized as Regional leaders in EDI and share strategy, tools, and training plan with other libraries</p>	<p>Roll out the collected content of this training to the wider SMRLA community, with Calvert, Charles, and St. Mary’s County teams. This collective learning exchange can help to strengthen the EDI ecosystem and collaboration between the teams.</p>	<p>Phase II, III</p>

Objective Four: Invest in a Talent Process to Create and Preserve a Diverse Workforce

Goal: Identify, attract, and onboard a pipeline of talent for the organization and Board across diverse dimensions through more intentional and innovative outreach, recruitment, and hiring.

Strategy	Action	Phase
<p>4A. Integrate EDI Statement and tagline in recruiting efforts and organizational outreach</p>	<p>Include EDI Statement and/or EDI Tagline into recruiting process.</p>	<p>Phase I, II, III</p>
<p>4B. Establish organizational EDI data beginning with creating baseline understanding of team and Board composition</p>	<p>Collect current EDI data and diversity demographics for the SMRLA team across, for example: gender; race/ethnicity; recruiting source; tenure; etc. This analysis should include team and Board.</p> <p>Collect current EDI data and diversity demographics for the Calvert, Charles, and St. Mary’s County teams across, for example: gender; race/ethnicity; recruiting source, etc.</p>	<p>Phase I</p> <p>Phase II</p>
<p>4C. For each role in the organization and for new roles that are identified, identify role details and establish position description template/document</p>	<p>Create position description template/document to be used for all roles that take into account organizational values, inclusive language, and that strive to be free from bias.</p> <p>Position description template should include: position title and reporting structure; position summary; position responsibilities; position requirements; and any required notice such as lifting, travel, etc.</p>	<p>Phase I, II</p>
<p>4D. Create recruiting plan for organization</p>	<p>Create organizational chart for organization and Board of Trustees that reflects person in role, position title, reporting structure.</p> <p>Organizational chart should be assigned to individual that will have responsibility for keeping it current and ensuring updated organizational charts are distributed as appropriate.</p> <p>Create recruiting plan for the organization. This should be done for both internal team and Board of Trustees’ positions.</p> <p>For each role identified in the recruiting plan, identify potential recruiting source, for example: online posting; recruiting firm; organizational referral.</p> <p>Consider developing an approval process for opening and recruiting for a new role.</p>	<p>Phase I</p> <p>Phase II</p> <p>Phase III</p>

CONCLUSION

The decision to approach the EDI journey more strategically will be instrumental in taking SMRLA to its next level of growth, innovation, and success. The commitment to SMRLA's own statement - *our association is committed to diversity, equity, inclusion, accessibility and belonging as core values that are vital to our mission and our ability to serve all of our stakeholders now and for years to come* - and aligning behavior to that tenet is what will take SMRLA forward in this work. Development and embedding of equitable practices, transparent communication, experiences that build collaboration and belonging, education and learning, and investment in talent processes to create more equity, diversity and inclusion will create a more authentic culture of trust, voice, and belonging. Ultimately leading to an even better experience for all who work at, with, and are served by, SMRLA.

*Committed to
Diversity, Equity, Inclusion,
Accessibility and Belonging*