- **Intro (slides 1-2)**
  - Hi all, my name is Whitney and I am the director of discovery services for special collections at the university of virginia library.
  - **Schedule (slide 3)**
  - What we're focusing on today is the idea that middle managers can make or break the implementation of a DEI initiative. DEI stands for diversity, equity, and inclusion. Other iterations of this phrase include an A for Accessibility and J for justice. All of that applies to what we are going to discuss today.
  - Our schedule today covers right around an hour total. I decided to add a few breaks where you all can ask questions or discuss together the ideas I'm bringing up as well as to give my voice a break.
  - Getting started, I've formatted the slides to the position cycle for any employee, beginning with hiring and going all the way through separation, whether that is voluntary or not. Each slide is divided into two sections: goals and solutions. Goals are what we want to achieve and solutions are how we do this to our best abilities.
- **Hiring**
  - We start with hiring, specifically with the goal of consistency between positions. We want to make sure that each search is run the same and only vary with who's on the search committee, what questions are being asked, and where in the library the position reports. Beyond that, consistency is key to ensure that biases are kept to a minimum and all candidates have an equal chance to succeed. Your institution should have a hiring checklist, usually provided by admin or HR, that is the same between each search. Documentation, throughout every stage of an employee's life cycle at their job, is key.
  - In addition, creating a question bank for interviews can be extremely helpful. Behavior- and duty-based questions help focus interviewing into a more welcoming experience for the candidate. As we know, the candidates are interviewing us as much as we are them. Speaking of, I am a firm believer that questions should be sent to candidates beforehand. Some folks think this denies candidates the opportunity to think on their feet and I argue that's what follow up questions are for. Giving questions beforehand allows for prep time and some folks, especially those who are neurodivergent, benefit greatly from that. It also allows candidates to remove themselves from a search if they do not agree with the questions being asked and that's a good thing.
  - If you are at the final round of interviews, it's time to think about making these accessible and I encourage you to ask yourselves the following questions: does this really need to be an all-day interview? Or could we spread this around over a week? Does this need to be in-person or can we use zoom? Do we really need a presentation for a job that focuses only on cataloging? We're at a time where we

can challenge the tradition of a typical academic library interview and I say we should focus on being inclusive to those who are unable to complete an entire day's interview for a variety of reasons.

- ○ The one thing I want to emphasize on this slide is the idea of hiring for retention and not in what I call a checklist mentality. There is an expectation of conformity for new hires that is not inclusive nor is it equitable. We hire diverse candidates and only think about them conforming to our current work environments with very little thought about their ability to show up at work as their true selves. I consider my job as a manager to hire the best person for the job and then create a work environment where conflict resolution is a core skill for all employees – we'll touch more on that later in the presentation.

- **Retention or Improvement**
  - ○ The goals here are pretty straight forward…except maybe the first one. I saw on Twitter a while back that a manager's job is to make their employees happy. I completely disagree with that and offer this instead: my job as a manager is to make sure an employee is safe because someone who feels safe at work is going to be productive. We hire our folks to do two things: complete their list of day-to-day duties and to contribute to the work environment in a healthy way. As a manager, we do this by consistently and clearly communicating deadlines for projects as well as our expectations of the completion of duties as well as behavior in the workplace.
  - ○ How do we do that? Let's start with the employee's role in creating a safe workplace. No one leaves their biases at home when they walk into the building Monday at 9 am and that impacts the work they do as well as those around them. What we need to think about, as managers, is does our employee handle feedback well? Do they gossip or create drama as a result of avoiding conflict? I have more suggestions of this on the next slide when we talk about performance management.

- Review of calendar: passion, pain, priority
  - ○ What is important here is figuring out how we can support our hires by recognizing that they are full and complex humans who react to stress and expectations differently. The first suggestion I have is to do a one on one review of their calendar and complete what I call a passion, pain, and priority exercise.
  - ○ I've done this with my staff and it's been an excellent chance to talk honestly with them. We go through their calendar and I ask them whether a meeting has to do with a passion (something that makes them excited), a priority (a part of their job that they must do), or a pain (it's not something they want nor need to do but it's been asked of them). We go through, I ask how their bandwidth is, and we talk. There is no goal here except to talk about what is making their weeks better and what makes them happy to walk in the door every morning. With a couple staff, I

was able to answer questions as to why I was having them do something. With another, I was able to take a committee they never should have been on in the first place – it had been my error in not taking it over sooner. It was an exercise that built trust and let my staff feel heard. It also let me hear if they were burning out and we could adjust priorities in the moment. Highly recommend it.

- Regular check-ins – more than annual review
  - A mistake I've heard managers make is that they only talk to their staff in the break room. "Oh, we'll catch up at their desk." Don't do that. First, it's not private. Second, it shows you won't make time for them. By dedicating specific time each week to an employee, you are showing you want to know them, hear any issues they may have, and work with them to get things done. Consistent meetings build trust. Having an agenda helps as well – I make my staff create the agendas and take notes. It allows them to take responsibility for what's discussed and that leads to them feeling empowered. I want empowered employees because that means they will tell me when something is wrong. Then we can fix it together.
- Stay interviews – what keeps folks coming to work? What's blocking their success?
  - Which leads me to this. I hate exit interviews because we're denied the opportunity to retain staff who didn't feel safe speaking up when things weren't going well. Stay interviews are a chance to prevent this. The idea behind these is having a conversation with any staff member you're concerned about leaving. Ideally, you'd want to have these with each of your employees at a consistent pace – once a year or maybe every two years. It provides a baseline: what brings you to work every day? Are you being blocked from success in any way? There are articles out there about this that have more specific questions but it reframes the employee-manager conversation away from that annual evaluation to one of "you're a valuable member of this team and I want to keep you here - help me do that". It builds trust. It builds community. And that benefits everyone.
- *Q & A*
  - That was a lot of info. What questions do you have for me or each other?
- **Performance management for staff**
  - Something that I hear commonly from staff about DEI initiatives is that they do not know how this is going to impact them, both as an individual and as an employee, specifically with their day-to-day duties. What they need is guidance to say, do this, not that and then we, as managers, provide specifics – we'll get to that in one minute.
  - The last goal here is to create equity with performance when it comes to new staff and legacy employees. This can be difficult to hear but, oftentimes, we allow legacy staff to behave in worse ways because they are familiar to us. We know they mean well, we know they're good people, but, truth is, we let things slide.

This is compared to new staff who come in and are held to higher standards because our standards are now higher. That isn't equitable, that isn't right. How do we prevent all of this and set staff up for success?

- My first solution is to create a DEI-focused goal for everyone that ties directly into their annual evaluation. And by everyone I mean everyone from the Dean to the frontline staff on the desk. Everyone. It is tempting to be general in this and say something like, "As a staff, we prioritize DEI work and making the Library a welcoming place." NOPE. You need to detail how. "As a staff, we prioritize DEI work and making the LIbrary a welcoming place by committing ourselves to regular training on antiracist workplaces, conflict resolution, etc." The more details, the better. Staff want to know how to succeed in this area but they need to know how they will be evaluated. I suggest having a short but specific goal that has a separate document that supports it which lists how exactly folks do this. Make it behavior-based, not just goals. If you say someone needs to attend 2 training sessions a year to be successful, that's all some folks will ever do. Including something about behavior makes it a practice in self-reflection and constant improvement. Include something about taking and receiving feedback or having difficult conversations.
- Related to this should be a standard section in every job description, again, from the dean to the desk staff, that lists DEI work being a part of every job at the library. It can be one section of the job description or each duty can have DEI as a focus.
- Staff also need to be able to interrupt biased behavior when they see it. They should be provided training on conflict resolution, taking/receiving feedback, and bystander training. If they are expected to behave in a certain way, they must be provided training to be able to do so successfully.
- The goal of this is to make DEI work a central part of every job. Not something that comes up every once in a while. No, this is something that needs to be at the center of our practices, our day-to-day duties, and our services. DEI is not an afterthought but the center of what we do and our staff needs to incorporate it at every level.

- **Performance management for managers and admin**
  - The goals for the performance management of managers and admin is two fold. First we need to make sure we are evaluating managers for their performance in being a manager. Second, just like I said about staff a few minutes ago, we need to provide training to managers to ensure they are set up for success when it comes to being a manager. Being a manager is difficult and we need to know we are supported.
  - My first two solutions focus on creating a community of support for managers. A monthly meeting for managers to come together and discuss topics can be

extremely helpful to create a space where they can feel safe to bring up issues they encounter with staff or admin. At UVA, I co-host these with my colleague, Elyse Girard, who sits on our admin team. Every month, we pick a topic that directly impacts managers. As an example, last month we discussed how to use UVA's education benefit and another month we discussed giving performance feedback. This meeting works well because the managers help us select the topics we discuss. We regularly have breakout room discussions that encourage them to talk to each other about the issues being raised.

- ○ Another way to build a community for managers would be creating a mentoring program where members of administration or different levels of managers create one on one mentoring pairs or small groups where more delicate issues can be discussed, from interpersonal conflict to discipline to professional development for managers. This can strengthen the bonds of trust further between managers.

- ○ The next solution focuses on getting feedback on managerial performance. Academia is very top down when it comes to feedback and that is incredibly damaging. The power stays at the top and that has the potential to create a toxic work environment. Just like our staff, managers can be biased, racist, homophobic, and more. Our staff's voices are important and need to be heard if we want to create truly inclusive workplaces.

- ○ There are two options to get their feedback in a safe way. First is the 360 review in which a managers supervisors, peers, and employees provide feedback in survey form that is often curated by a third party, either a HR department or a vendor. This is costly if done through a vendor.

- ○ The next idea is called a skip level interview in which the manager's supervisor interviews the manager's direct reports and gets feedback that way. The supervisor then gives the feedback to the manager and a discussion is held. The specifics of both of these would depend on the institution but both are very doable and key to changing the workplace as a whole.

- **When is enough enough?**
  - ○ Something we don't talk about when it comes to performance management in this realm is when is enough enough. What I mean by this is we all know that "nice person", i'm using quotes around that phrase, that is a good person. They don't mean to use microaggressions. They don't mean to do a lot of things but a lot of things they do make the workplace uncomfortable. So when is enough enough? When is there enough training and enough evaluation and enough feedback? But in the end, that staff member isn't coming forward with the rest of your team. What do you do? That is the question that you need to bring to your higher ups in admin and HR because they need to define that line for you and they need to support you when that line is reached.

  - ○ For me, every DEI initiative needs to have teeth, so to speak, consequences for

behaviors, intentional or not, malicious or not, that do not align to the values being set forth in these initiatives. We need to show our staff from marginalized communities that their safety comes first before the comfort of the most privileged in the workplace. It's difficult but it is central to the changes we need to make as a field, as institutions, and as managers.
  - It's time for our second breakout room – you have five minute to discuss what we just spoke about.
- *Q & A*
  - Time for another pause. Anyone have any questions? Thoughts they want to share?
- **Termination or voluntary separation**
  - Welcome back. We are now going to talk about the last part of an employee's work cycle while in a position – termination or voluntary separation. Voluntary means that someone transferred, retired, or left the institution of their own volition. Termination means that the institution decided to let an employee go. This often comes after months if not years of disciplinary action.
  - The goal of any separation is to treat each exit with dignity and respect. It can be difficult, especially if the separation comes after discipline. What can we do to make this time easier? We can do that by creating off-boarding procedures that create consistent exits. This can include a checklist of what to do with IT equipment, physical spaces, work half-done, etc. It can also include goodbye parties, announcing exits to all staff, etc. This is about checking in with the employee to see what their comfort level is. This is also about the Library setting the standards for an employee's last weeks. Remember: clear is kind especially when emotions may be high.
  - We also want to give an employee space to give feedback on working at the institution. Ideally, we'd only rely on those stay interviews I touched on a while back but that isn't always the case. Exit interviews are hard. Should the dean or another member of upper admin be the folks doing these? If it's a risk you want to take, go for it but 10-1 that's not going to play out how you think it is. A peer-to-peer exit interview is one possibility that allows a representative from a staff organization, whether that is a union, staff senate, etc., to provide a safer space where the power differential is much less than that of a dean or a representative from HR.
  - An alternative is a survey where someone can answer anonymously but that has a downside if you're in a small institution and only 2 people left that year. We're curious creatures and we want to figure out who said what even if we know, ethically, that is problematic. Whether it is a survey or a peer to peer, consistency in questions are key here. Do not ask one person something different unless there is a distinct difference in job duties. An example of that is a manager versus a

liaison.

- **Culture shifts**
  - We talked about a lot today and I wanted to end by talking about cultural shifts. Because that's what all of this is about. Every solution and goal I listed before this leads to a change in culture because that is what a DEI initiative is meant to do. We need to recognize that our current work environments do not serve staff equally – we have too much privilege leveraged towards white folks. The goal for all of this is to create a safe work environment for all staff. We need to create a culture where feedback is given and received in a safe and healthy way. The phrase for this in the business/psych world is positive conflict. It means that we can use conflict to transform who we are as a group in a positive way.
  - The solutions on this slide get us there. We need training on conflict resolution so we know how to interrupt biased behavior and correct each other while maintaining healthy working relationships. It needs to happen at every level and it needs to be mandatory for all staff.
  - Next suggestion is a mentoring program for all staff, including managers and admin, so folks have a safe place to go with questions. Managers should mentor managers and staff should mentor staff. It could be done through a staff senate or other internal group but there are a lot of benefits here.
  - Related to this is something I did at UVA which was to create a monthly discussion group where a topic related to DEI is chosen and then discussed by peers. I co-lead this group in Special Collections with my colleague, Krystal Appiah, and for the better part of two years, we led monthly discussions where we talked about everything from racism to transphobia to giving and receiving feedback. We provided regular discussion questions and these were first discussed in small groups then to the larger group so we could share thoughts. A lot of learning happened and it was a good thing.
  - All of these solutions tie back to something I said earlier: we need to put DEI in the center of what we do so it goes from being secondary to a necessary part of our every day work environment.
- **Resources**
  - On this slide is a list of resources I suggest reading. Most come from the business world or academia but still worth a read for the solutions listed alone.
- **Conclusion/Q&A - 10 minute**
  - And that's it from me. I'd like to open up the room for questions. I really enjoyed this and am here to answer any questions you all have even after the session ends – my contact info is on the slide.Any questions?