

Identity-Based Routines in the Public Library: Structuring the Workplace to Better Support Staff with Diverse Identities

The School of Information Science, University of South Carolina, requests \$321,973 from the Laura Bush 21st Century Librarian Program to support a 3-year applied research project. This project will examine how the identities of public library staff influence their engagement in routine library work, the strategies staff develop to work around barriers in these routines, the effectiveness of these workarounds, and the role of management in supporting staff efforts. Workplace routines highlight the expectations for how work should be completed, and they are often experienced differently based on a worker's identity. Because of who they are, one worker may find it harder to complete a routine than another worker, or the routine may require things of one worker that it does not require of another worker. This can lead to work-related anxiety, stress, burnout, and attrition. In the project's first phase, audio diaries with diverse staff will uncover identity-based routines (IBRs), the positive and negative effects of these routines, and strategies staff develop for working around problematic routines. In the project's second phase, participatory design workshops with staff and management will guide them in the design of solutions to combat the negative effects of IBRs. In the project's final stage, the findings from the first two stages will inform the development of professional development (PD) curriculum aimed at teaching staff and management how to expose problematic IBRs, identify strategies for developing their own workarounds, and implement contextual supports that make it easier for staff to complete routines in ways that affirm who they are. The project will then evaluate the effectiveness of these courses in meeting these learning outcomes. The project asks the following research questions (RQs) about public libraries:

- How does a staff member's identity influence their engagement in everyday work routines?
- What affordances and disaffordances are associated with these identity-based routines?
- What workarounds do staff implement to overcome disaffordances in identity-based routines?
- What are staff members' perceptions of the impact of their workarounds?
- What can management do to better support the efforts of staff to overcome disaffordances in identity-based routines?

Project Justification

A typical worker will spend over 90,000 hours at work (Goudreau, 2010), making the workplace a critical field of study for researchers interested in issues of equity, diversity, and inclusion. While the workplace can represent a source of fulfillment and rewards, it also represents a *nexus point* for social oppression, introducing more barriers for certain workers than others (Blustein, 2008, p. 231). These barriers tend to arise in response to visibly identifiable components of a worker's identity. This means that, simply because of who they are, many workers face barriers that make it difficult to enter, stay, succeed, and advance in the workplace, and their skills and expertise are often severely underutilized (Fassinger, 2008). While libraries have increasingly been engaged in efforts to increase workplace inclusivity (Gray, 2019), they continue to be "deeply racialized spaces where race-conscious motives, practices, and policies are inevitably enacted" (Hall, 2012). Workplace assumptions often punish staff who do not meet certain white, middle-class, heterosexual, cisgender, or hyper-able criteria (Hathcock, 2015). A lack of diversity in the public library staff workforce (PLA, 2021) works to further alienate staff with non-dominant identities. So, while *vocational awe* (Ettarh, 2018) might suggest that the public library is not a place of social oppression, it often is.

By focusing on routines, the proposed project takes a specific and narrowed look at how the library workplace sets up barriers for certain workers based on components of their identity, i.e., who they are. Routines are task-oriented behaviors that occur in particular sequences and become familiar to workers as they are repeated (Feldman et al., 2021), and they come with sets of blueprints that outline how the work should be completed. The repetition and standardization of these blueprints is often a necessary part of work, and routines can help to simplify work, avoid the need to reinvent the wheel each time an action is performed, and circumvent continuous infighting about how work should proceed (Feldman & Pentland, 2003). Yet, because two workers completing the same routine often experience these blueprints differently, routines can further embed and hide discriminatory expectations and assumptions. Because of aspects of their identity, a worker may struggle to follow a blueprint, or the blueprint may make assumptions about the worker that fail to align with that worker's sense of who they are. These challenges are present when the blueprints for BIPOC staff are more detailed and rigid, leading to an *overproceduralization* of their work, or when BIPOC staff are expected to restrict their pursuit of career goals in their completion of routine work (Ossom-Williamson et al., 2010). Blueprints for staff with disabilities often lack the necessary accommodations, expecting staff to complete the work as if they had no disability. This may explain, in part, why over 60 percent of disabled library workers report being exhausted at the end of the workday (Brown & Sheidlower, 2019). The blueprints from patrons and colleagues might subject staff to constant questioning about where they are *really* from (Mody et al., 2018), assume lower levels of intelligence by spelling out simple words for Black staff (Hall, 2012), or define the work of a staff member by elements of their identity, e.g., the expectation to work like a "gay librarian" (Philips, 2011). In this way, routine work becomes a constant reminder for staff of the library's devaluing of their skills, which can lead them to doubt their professional worth and likelihood to succeed (Owuamalam & Zagefka, 2014). The resulting frustration and burnout are leading to high rates of attrition among minority staff (Hathcock, 2015).

Routine blueprints might also call into question the legitimacy of certain identities. After an LGBTQIA+ participant in one study (Galupo & Resnick, 2016) was put in charge of a hiring routine, a manager altered the blueprints because of who the worker was: "I was later informed that this manager told another manager that she did not want me to interview and hire the new recruits because I would try to hire 'hot chicks to date'" (p. 278). This suggests to workers that they should hide parts of themselves as they complete routine tasks. A staff member suffering from panic attacks may feel the need to hide these attacks from management (Freeburg & Klein, 2022). Black staff often feel the need to "hide parts of themselves to remain viable in their careers" (Ossom-Williamson et al., 2021). Failure to follow these IBRs, and conform to their expectations, leads to additional challenges and discomfort for staff (Cooke, 2017). Over time, this delegitimization of a staff member's identity can lead to negative emotions and distress (Stets & Burke, 2014). The rapid development of new workplace routines and blueprints during the pandemic reinforced existing inequities and encoded new inequities. This may help explain why the staff attrition problem became worse during and after the pandemic (Ewen, 2022). More than a quarter of public libraries reported having lost staff during this time (PLA, 2021), and staff reported high rates of burnout, changed job duties, increased work hours, and changed roles (Goek, 2021).

This project supports IMLS Objective Goal 1, Objective 2, to build capacity by supporting the training and professional development of the library workforce. The project also supports the objectives of the Laura Bush 21st Century Librarian Program to "support the development of a diverse workforce of librarians and archivists in order to meet the information needs of their communities." It supports these objectives by uncovering workplace obstacles, partnering with public library management and staff to design solutions,

and training the workforce based on these findings. The study of workplace routine dynamics has only recently started to critically consider issues of identity (Feldman & Pentland, 2022), and this project is the first to apply this lens to the work of public librarianship. This provides the profession with another set of tools to increase workplace equity, diversity, and inclusion. The target population directly affected by the outputs of this project includes the nearly 140,000 (ALA, 2018) public library staff across the country—most of whom have at least some elements of their identity that are perceived as incompatible with routine blueprints. By addressing staff concerns, the ultimate beneficiaries of this project are the communities in which these staff members serve.

Project Work Plan

Theoretical Framing. This project is grounded in practice theory and the study of routine dynamics. Practice theory considers what people do, how what they do creates and recreates institutional and social structures, and how those structures go on to influence future action (Feldman et al., 2021). It suggests that while social structures influence and are part of individual behavior, individual behavior also influences and is part of the social structure (Wendt, 1987). This means that people have opportunities to push back against and change the structure.

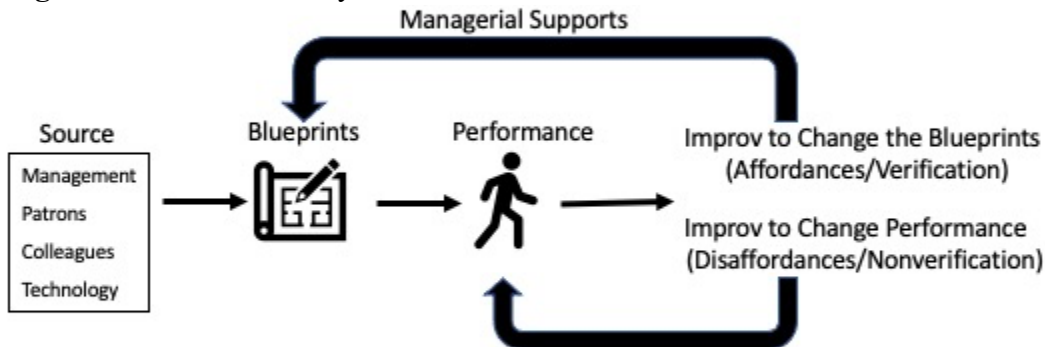
The study of routine dynamics applies practice theory to repetitive, task-oriented work. The social structure of a routine is known as its *ostensive* aspect, and the role of individual behavior in a routine is known as its *performative* aspect (Feldman & Pentland, 2003). The ostensive aspect of a routine outlines the abstract blueprints, recipes, or templates for work behavior (Becker, 2004; Felin & Foss, 2009), suggesting how work *should* proceed. The proposed project is interested in the extent to which these ostensive blueprints are allocated and experienced differently among staff based on components of their identity and how these differences suggest certain affordances and disaffordances for staff. Affordances suggest potential “opportunities for action” (Hadavi, Kaplan, & Hunter, 2015, p. 20), while disaffordances suggest what a person is blocked from doing (Costanza-Chock, 2018). Identity theory suggests that one particularly significant disaffordance is nonverification, which occurs when the blueprints provide feedback inconsistent with either a staff member’s own sense of identity or others’ perceptions of their identity. This can lead to negative emotions, including anger, rage, annoyance, and hostility (Stets & Burke, 2014).

While the ostensive aspect outlines the general blueprints, it is never detailed enough to specify exact behavior (Feldman & Pentland, 2003). Instead, these details are worked out in the performance of a routine, as the routine is interpreted and applied to practice. So, as workers enact the routine, they introduce some variation from the blueprints. Their performance may attempt to work around these blueprints, overcome specific disaffordances in them, or hide their deviations from them. In this way, the performance of a routine is like a musical performance (Feldman & Pentland, 2003). While the musical score outlines how the music should be played, there is always variability in each musician’s performance of that score. Variance in routine performance can change the blueprint itself, i.e., change the musical score. Routine performance can also lead to identity nonverification to the extent that a worker’s own actions invalidate either their own sense of identity or others’ perceptions of their identity. This can elicit negative emotions, including disappointment, sadness, embarrassment, and shame (Stets & Burke, 2005).

Figure 1 provides an overview of the study’s theoretical framing of problematic IBRs. The blueprints for these routines—originating from management, patrons, colleagues, and technology—are distributed to library staff. As staff enact or perform these blueprints, their improvisations may be focused on revising the

blueprints or on changing their own performance to better align with the blueprints. Changing the blueprints can lead to verification and suggest affordances, so long as management puts the necessary contextual supports in place. Supports include formal policies and practices that support equality and specify acceptable behavior; a supportive climate that affords psychological safety, positive social interactions, and freedom to express one's true self; and relationships that offer empathy and support (Webster et al., 2018). Changing performance to better align with the blueprint leads to nonverification and other disaffordances, as workers hide parts of their identity or act like they are someone else, i.e., *dyssaffordances* (Costanza-Chock, 2020).

Fig 1: Problematic Identity-Based Routines



Goals. In this project, we seek to uncover problematic IBRs in the public library, the disaffordances they present to staff with these identities, the strategies staff develop to overcome these barriers, and the extent to which these strategies affirm salient parts of their identity. We also aim to uncover contextual supports (Webster et al., 2018) that management can implement to support lasting revisions in problematic routines. Revising IBRs to better align with staff identities can elicit a sense of belonging, increased self-esteem, and increased self-efficacy (Stets & Burke, 2014). We aim to translate these findings into professional development that trains staff to develop their own workarounds and trains management to support staff efforts to revise problematic IBRs. To achieve these goals, the project will 1) **Collect and analyze audio diaries** from public library staff to uncover the nature of IBRs, how they impact work, what staff do to work around them, and the extent to which their efforts change the routine; 2) **Bring public library staff together** to reflect on these findings and develop solutions aimed at increasing staff capability to recognize, push back against, and revise problematic IBRs; 3) **Bring public library management together** to reflect on these findings and design contextual supports that validate diverse staff identities and support staff efforts to revise IBRs; 4) **Develop, implement, and refine** professional development for both staff and management; 5) **Disseminate findings and professional development** through the project website, scholarly journals and conferences, and courses within USC's diversity certificate.

Project Team. Darin Freeburg, associate professor at the University of South Carolina's iSchool, will be the project's principal investigator (PI). He will work closely with one research assistant (RA), Katie Klein, who is a Ph.D. student in USC's program. The RA will assist in all project phases, including design, data collection, analysis, and development of project materials. The RA will also support the management of the project, including project logistics and coordination, participant recruitment, marketing and promotion, and webinar support. A web developer will be hired to design, develop, and maintain the study website. Because of the project's focus on identity issues, the **advisory council** will play a significant role as co-researchers. An advisory council of 10 will be recruited in year 1 to support all phases of the project, and initial discussions have already begun with members of the ALA Black Caucus, REFORMA, the

Association for Rural and Small Libraries, the Asian/Pacific American Librarians Association, and the National Library Service for the Blind and Print Disabled. The council will also include equity and engagement officers at the project sites. These groups are chosen because they support the efforts of specific identities within the library workforce, and their inclusion on the project team will improve the project's validity and ensure that the diverse staff under investigation have a voice in all project phases. Each council member will devote 5 hours each month to the project, including attending monthly meetings and providing input in-between meetings on the selection of study sites, research questions, methods, analysis, workshop development and promotion, and professional development course creation and promotion. **Public library staff** will also be well-represented in this participatory research project. Their voices, captured in audio diaries, will drive the project's year 1 findings. The participatory design workshops in year 2, conducted with **staff and management**, will ensure that practitioner voices drive the development of the professional development curriculum. The feedback from staff and management on the professional development courses in year 3 will drive revisions of this curriculum.

Timeline

- Year 1 (Aug. 2023-July 2024): Finalize advisory council; finalize diary prompts and interview guides; receive IRB approval; identify the 1 local and 3 nationally representative study sites and send invitations; travel to each site to explain the project and recruit participants; participating staff complete audio diaries and follow-up interviews; analyze diaries and interviews; write up results and submit for publication; develop a report on research rigor; add blogs and outputs to project website; facilitate 2 after-action reviews to assess performance measures.
- Year 2 (Aug. 2024-July 2025): Finalize participatory design workshops for staff and management; identify the 4 nationally representative workshop sites; develop and distribute materials to promote the workshops; hold workshops; analyze workshop design products and participant feedback; prepare and distribute workshop reports; analyze responses to the Participation Evaluation Questionnaire; add blogs and outputs to project website; facilitate 2 after-action reviews to assess performance measures; begin translating workshop reports to PD curriculum.
- Year 3 (Aug. 2025-July 2026): Finalize PD curriculum; recruit administrators who will oversee local PD efforts; hold meetings with PD administrators; promote PD courses on library listservs and social media; develop and host PD webinars for management and staff; recruit PD course participants; finalize course evaluations and send to course participants; analyze evaluations and revise curriculum; analyze products developed by course participants; add blogs and outputs to project website; facilitate 2 after-action reviews to assess performance measures; translate curriculum into a 3-credit course offered within USC's diversity certificate program.

Stages. The project includes 3 year-long stages. In *Stage One* (Year 1), the PI and RA—in consultation with the advisory council—will recruit 40 library staff participants from 1 local and 3 nationally representative public library sites. Because the study is interested in all potential identities that might play a role in routine work, participation is not restricted to specific populations. Yet, the project will intentionally recruit participants with identities known to influence routine work, e.g., staff who are disabled, Black, women, LGBTQIA+, nonprofessional. Recruitment will include purposive sampling, and the sites chosen will be those that employ a higher-than-average proportion of diverse staff based on things like race, gender, sexuality, and ability. The advisory council will help to ensure a diverse sample.

At each site, 10 staff will be asked to record one audio diary entry every day over 5 working days, following a series of prompts (Worth, 2009) developed by the research team. In the case of smaller libraries, which may not have 10 staff to participate, participants will be recruited from multiple sites in the geographic area. Organizational research has increasingly adopted diary methods (Ohly et al., 2010; van Eerde, Holman, & Totterdell, 2005). They offer an advantage over traditional methods, like surveys and interviews, because data collection occurs closer to the event in question, i.e., “life as it is lived” (Bolger, Davis, & Rafaeli, 2003, p. 597). Audio diaries offer the additional advantages of increased flexibility (Williamson et al., 2015), decreased burden on participants (Markham & Couldry, 2007), and increased insight into a participant’s sense-making process (Monrouxe, 2009). Participants will be asked to talk about their experiences in at least 2 routine tasks per day, defined as any familiar and repetitive task. The prompts will guide participants to discuss what they did, what others expected from them as they worked, the extent to which elements of their identity played a role in forming these expectations, how those expectations influenced their work, if they did anything to work around these expectations, and the extent to which they felt their efforts were successful. Given the topic's sensitive nature, the lack of researcher presence during data collection will make it easier for participants to complete the diaries and increase the validity of their entries. Each participant will receive a \$40 gift card for participating.

Because diary studies require more in terms of participant training and preparation (Williamson et al., 2015), the PI will travel to each site prior to data collection for 90-minute sessions with potential participants that provide a detailed overview of the study, answer questions and build rapport, distribute and review the study packet, and recruit participants. Multiple sessions will be held at both large and small sites in the geographic area. These sessions will increase participant comfort with audio diaries and help ensure they are completed as intended. This direct recruitment of participants by the PI will protect their confidentiality because, although management may know who attended the sessions, they will not know who agrees to participate in the study. The study packet will include a detailed overview of the study, instructions on downloading and using the recording app, a brief demographics questionnaire, instructions on uploading recordings to Dropbox, and the entry prompts. These materials take on added importance given that the research team will not be present with participants during data collection (Crozier & Cassell, 2016). Each participant will receive daily text reminders to complete the diary entries, and the research team will check in on progress with a phone call twice during the week. Consistent with previous diary studies (Crozier & Cassell, 2016), participants will be asked to spend as much or as little time on each entry as needed. While this introduces significant variety in response times, it also increases participant ownership over the process. Consistent with previous audio diary research (Poppleton, Briner & Kiefer, 2008), participants will also engage in a semi-structured Zoom interview within two weeks after completing the audio diaries. Questions will emerge from the audio diary analysis, and the research team will be able to ask staff questions about the perceived effectiveness of their workarounds, check their understanding of the participant’s entries, and probe deeper into specific parts of their entries.

Analysis of audio diary and interview transcripts will follow the qualitative method of template analysis, which is a commonly used approach in organizational research that involves the creation of a list of hierarchically ordered codes that account for themes emerging from a detailed reading of transcripts (King, 1998). The initial template will derive from a review of the existing literature. After the first participants complete the study, the PI and RA will each analyze a small section, identifying which of these *a priori* codes apply to the data, which codes need to be revised, which new codes emerged from the data, and how the codes should be ordered hierarchically (King, 1998). The PI and RA will then meet regularly to

compare coding and negotiate a provisional template for the rest of the transcripts. This template will be shared with the advisory council. The remaining transcripts will be divided among the PI and RA, and the researchers will then continue in an iterative process of applying and collectively revising the template until all data have been coded. After the template has been finalized and applied, the PI and RA will further explore and interpret the data and codes using Nvivo's querying tools.

Institutional Review Board approval will be sought prior to recruitment, which is especially important given that ethical considerations are heightened because of the intimacy of the audio diary method and the way it brings researchers closer to participant's everyday life (Monrouxe, 2009). Because the diaries ask about potentially stressful situations, some participants may find certain recordings distressing. The researchers will not be present during the recording, so they will not be made aware of a distressing recording until much later. Thus, following Williamson et al. (2015), participants will be provided with a list of mental health resources to contact in the event that a particular recording is distressing. Participants will also be allowed to end the study at any time.

Research questions in Stage 1 include:

- How does a staff member's identity influence their engagement in everyday work routines?
- What affordances and disaffordances are associated with these identity-based routines?
- What workarounds do staff implement to overcome disaffordances in identity-based routines?
- What are staff members' perceptions of the impact of their workarounds?
- What can management do to better support the efforts of staff to overcome disaffordances in identity-based routines?

The success of Stage 1 will be determined by assessing the rigor of the research along four dimensions, including credibility, transferability, dependability, and confirmability (Lincoln & Guba, 1985). Credibility refers to the extent to which results are true or believable; transferability refers to the degree to which results can be transferred to other contexts or settings; dependability suggests that findings are repeatable and methods are consistent; confirmability refers to researcher neutrality and confidence that results can be corroborated by others (Korstjens & Moser, 2018). Credibility will be supported in this project through the triangulation of data sources, methods, and multiple investigators. In addition, the research team will engage in member-checking by regularly sharing ongoing analysis and findings with participants, who will be given an opportunity to provide feedback. Transferability will be supported by the rich and thick description of study methods and data. Dependability will be supported by an auditable link between the data and study findings. Confirmability will be supported by the collaborative coding of study data and regular reflexive journaling of researcher bias and assumptions.

In Stage Two (Year 2), public library staff and management will engage in a series of 3-hour participatory design workshops, informed by Stage 1 findings, aimed at generating solutions to problematic IBRs. The PI will act as the facilitator, and the PI and RA will take participant observation notes throughout. Workshops will be held at 4 nationally representative sites, distinct from those in stage 1. To ensure diverse participation, the selection of sites and recruitment of participants will follow the same process as outlined in stage 1.

At each site, 1 workshop will be held with staff, and 1 workshop will be held with management. Participants will receive a packet that outlines the workshop and includes activity descriptions and prompts.

The future workshop (FW) method, developed by Jungk (Jungk & Miller, 1987), will be used to collectively design an ideal future and a means of getting there. FWs aim to criticize a current situation, dream about an ideal future situation, and identify ways to move from the current situation to the ideal (Vidal, 2005). At the staff workshops, participants will first critique the current situation through a card-sorting exercise. Card sorting is commonly used by participatory design researchers to further understand participant experiences and generate ideas about the future (Sanders, Brandt, & Binder, 2010). Codes and categories from the template analysis in stage 1 will be placed onto cards. In groups, participants will be asked to group these cards into separate cases and critique them. Each case will have one routine, one associated disaffordance, and one associated workaround. This suggests what types of disaffordances participants associate with different routines and the workarounds they think are most appropriate. Participants will then engage in a brainstorming session centered around the ideal future or fantasy concerning IBRs in the library. Ideal futures will be documented on a flip chart, and participants will pick 2-3 futures to focus on. Finally, participants will evaluate the feasibility of these futures and map out a step-by-step plan for achieving them. After the workshops, the research team will distribute a report to staff participants summarizing what took place and asking for feedback. The management workshops will follow a similar process, except their design will focus on creating contextual supports within the workplace. In the card sorting exercise—similar to the staff workshops—management will be asked to organize cards containing codes from the template analysis into distinct IBR cases. However, their design of ideal futures will consider workplaces that better support the cases they created. Participants will then evaluate these ideal futures and map out a detailed plan for achieving them. After the workshop, the research team will share a report with management participants summarizing their activities.

To help ensure that the project’s research questions are relevant to practice, specific **practice-based questions** in Stage 2 include:

- How can the discovery of IBRs influence a staff member’s day-to-day performance of library routines?
- What do staff and management consider to be ideal when it comes to IBRs?
- What specific things can staff and management do to achieve this ideal?

To evaluate Stage 2, participants will complete a questionnaire that adapts the Participation Evaluation Framework for participatory design (Gerrard & Sosa, 2014). This framework evaluates participatory design efforts along 6 dimensions, including its objective, practice, levels of interaction and collaboration, barriers that limit participation, how the target population is represented, and impact. Success will be determined by the extent to which the workshop participants felt that: they were well-represented in the workshop process and outputs, their efforts will lead to lasting organizational change and renewed mindsets, there was a high degree of awareness and appreciation between participants, and the workshop lacked social and political barriers. Participants will also complete a feedback questionnaire after each workshop.

In Stage Three (Year 3), with support from the advisory council, the research team will translate the audio diary findings from Stage 1 and the FW reports in Stage 2 into two professional development (PD) courses—one for staff and one for management. The staff course will include 4 week-long modules. Module 1 will describe the theoretical framing of IBRs and their impacts. Modules 2 and 3 will highlight findings from the project’s first 2 stages, giving participants several specific examples of IBRs and their impacts. Module 4 will prepare participants to design and implement their own workarounds by developing a series of cases and personas. By the end of the course, participants will be able to describe IBRs and their

impacts, critique IBRs based on their impacts on staff, and develop and implement strategies for overcoming them. It aims to increase participants' cultural competency (Cooke, 2017) as it concerns the role of identity in library routines. The first three modules of the management course will be similar to those in the staff course, but module 4 will ask participants to develop an action plan that includes formal policies, a plan for instilling a supportive climate, and a plan for supporting relationship development aimed at shifting library routines in ways that lower barriers and better affirm the identities of all staff. Four cohorts will complete the courses, including 2 staff and 2 management cohorts.

To support the development, promotion, and logistics of these courses, the research team will convene 15 representatives from state libraries across the country—including the South Carolina State Library—in a series of virtual meetings that introduce them to the curriculum, its goals and objectives, and requirements for participation. These state libraries typically play an important role in overseeing PD in their state. Administrators at these meetings will also provide insight into their respective PD processes to ensure participants are recognized for completing the course. Promotions for the courses will be sent to staff and management across the country, who will be invited to a 60-minute webinar that overviews the project and the courses. Staff will submit their cases and personas, and management will submit their policies and plans, to the research team at the end of the course. Participants will also complete a detailed course evaluation, which will be used to revise future courses. To sustain this effort beyond the project period, the PD will be combined into a 3-credit course offered within USC's diversity certificate program.

To help ensure that the project's research questions are relevant to practice, specific **practice-based questions** in Stage 3 include:

- How does the discovery of IBRs influence staff and management training, including both professional training and the formal MLIS degree?
- To what extent can this training increase cultural competency across the profession?

The success of Stage 3 will be determined by assessments of the products developed by participants (cases, personas, and action plans) and course evaluations completed by participants. Participant products will be evaluated in light of the course learning outcomes, and course evaluations will allow participants to self-rate their progress in each learning outcome and provide direct feedback on their experiences in the course.

Diversity Plan

While it is important to consider ways of increasing diversity in hiring practices, it is also important to ensure that these diverse hires are not penalized for their diversity. The proposed project suggests that the very identities of library staff that make them diverse can represent deviations from the expectations of others. These deviations can lead to significant negative impacts like bullying, burnout, loss of identity, and, eventually, attrition. Because these routines are repeated, familiar to workers, and normalized, they can hide discriminatory thoughts and practices and multiply their negative effects. By revealing to management and staff how identity influences routine expectations, this project will help increase cultural competency within the profession. This is key to becoming a more “competent, inclusive, and caring professional practice” (Cooke, 2017, p. 130) that supports all workers. This project will also directly support the efforts of staff with diverse identities to work around and revise problematic routines. By also targeting library management, the project aims to increase workforce diversity in sustainable ways that lead to lasting change. To achieve these aims, the voices of these diverse staff must drive all phases of the project. The audio diaries in Stage 1 allow diverse staff to tell their own stories of IBRs. The workshops in Stage two

allow both staff and management to craft their own solutions. And the feedback from PD courses in Stage 3 allows staff and management to direct the future training of library staff. The diverse representation on the advisory council will help to amplify these voices.

Project Results

Routines can place significant burdens on certain staff because of who they are, making it harder for staff with nondominant identities—including BIPOC, LGBTQIA+, and disabled staff—to complete routine work. The repetition and normalization of these routines can reinforce and further hide bias and discrimination in the library workplace, leading to work anxiety, stress, burnout, and attrition. By narrowing the investigation of workplace discrimination to work routines, the current study will result in a new set of tools for both practitioners and educators in the fight for equity, diversity, and inclusion. The proposed project will result in new knowledge about the role of identity in staff completion of library routines and what management and staff can do to ease the identity-based burdens in these routines. This will inform changes to curriculum and workplace policy that will embed the project’s findings in long-term structural shifts that better support the identities of all staff. This knowledge will be based on project data, including audio diary transcripts, questionnaires, interview transcripts, participatory design products, and participant feedback questionnaires. The outputs associated with these project results include:

- ongoing blogs (6-8 throughout) that will be added to the project website that provide updates on progress and describe study findings.
- anonymized data from year 1 that will be added, with participant consent, to the project website.
- findings from each year that will be reported under open-access licenses in top-tier journals, e.g., *The Journal of Documentation*, *The Journal of Information Science*, *The Journal of Librarianship and Information Science*.
- anonymized workshop design products from year 2 that will be added, with participant consent, to the project website.
- anonymized workshop reports from year 2 that will be added to the project website.
- two PD courses that will be distributed through local PD coordinators, listservs, and social media. Syllabi, reading lists, and lecture notes will be added to the project site.
- participant products from the PD courses that will be anonymized and added, with participant consent, to the project website.
- a 3-credit hour course that will be designed for USC’s diversity certificate.

All outputs will include a CC-BY license to encourage their use and distribution beyond the study period, and their inclusion on the project website will make them readily available for public libraries across the country to support their equity, diversity, and inclusion efforts. By working closely with the advisory council, staff, and management, the project will ensure that these outputs are relevant, understandable, and useful. The 3-credit hour course within USC’s diversity certificate will be offered regularly, helping to sustain the project’s impacts beyond the project’s conclusion.

Digital Products Plan

Identity-Based Routines in the Public Library: Structuring the Workplace to Better Support Staff with Diverse Identities

What types of digital products will you create?

Digital products include a) **instructional materials** and b) **project outputs**, which will be made available on the c) **project website**. The products will be created using applications such as Microsoft Office, Adobe Acrobat, WordPress, and Google Suite products.

Content	Description and Quantity	Format
Instructional Materials		
Professional development course materials	Syllabi, modules, and slides from 2 professional development courses	PDF/A, JPEG, .txt
Professional development webinars	Slides and video overview of 2 professional development courses	MP4
3-credit-hour course materials	Syllabi, modules, and slides from a 3-credit hour course to be included as part of the iSchool's diversity certificate	PDF/A, JPEG, .txt
Project Products		
Research Products	Scholarly articles and conference presentations (TBD)	PDF/A, .txt
Workshop Products	Packets overviewing 2 participatory design workshops; photographs documenting design products at 8 workshops; workshop reports (8)	PDF/A, JPEG, .txt
Participant Professional Development Products	Assignments created by participants in the 2 professional development courses (TBD)	PDF/A, JPEG, .txt
Project Website		
Project Website	Hosted by the College of Information and Communications at USC on the university domain (sc.edu). Includes open access to instructional materials, project publications and presentations, and blogs by the PI to	HTML
Blogs	The PI will write a regular blog to provide updates on progress and findings (6-8/year).	HTML

How will you make your digital products openly available (as appropriate)?

Instructional materials, workshop products, participant professional development products, and blogs will be published on the project website under Creative Commons Attribution-NonCommercial-ShareAlike 4.0 (CC BY-NC-SA). This license promotes re-use and enables others to modify and adapt as needed for different contexts, while promoting continued sharing and ensuring proper attribution to the project team, stakeholders, and IMLS. Where possible, these materials will be uploaded in widely used formats (e.g., .txt, pdf) to facilitate access and re-use. Anyone can access this website and freely download content without the need for specialized software.

The project budget includes funds to publish research products, where possible, under open-access licenses. Pre-prints, where allowable, will be added to USC's Scholar Commons repository. USC Scholar Commons works with all of the highly-used regular and academic search engines (e.g., Google, Google Scholar, Bing, etc.) to push repository content to the top of result lists. Scholar Commons is part of Digital Commons, the institutional repository provider of over 500 institutions, and it allows for easy cross-searching from within

the platform. PlumX metrics are automatically added to most research. The USC Scholar Commons repository interface will assign metadata to research and data products. The metadata is flexible and customizable based on dissemination needs, and are targeted toward promotion and discoverability. The PI will consult with USC librarians who maintain the commons on appropriate metadata standards and content based on the goals for dissemination, which will be established throughout the duration of the project. The USC Scholar Commons repository interface will assign metadata to research and data products. The metadata is flexible and customizable based on dissemination needs. All of the metadata fields, whether or not they are patron-facing, are targeted to promote search discoverability. The PI will consult with USC librarians who maintain the commons on appropriate metadata standards and content based on the goals for dissemination, which will be established throughout the duration of the project.

What rights will you assert over your digital products, and what limitations, if any, will you place on their use? Will your products implicate privacy concerns or cultural sensitivities, and if so, how will you address them?

Products, including instructional materials, workshop products, participant professional development products, and blogs will be published on the project website under Creative Commons Attribution-NonCommercial-ShareAlike 4.0 (CC BY-NC-SA).

Prior to each workshop and the start of each professional development course, participants will be asked if they consent to their products being added to the publicly available website. If a participant does not give consent, their specific contributions will be redacted. Prior to making any digital product available, all information that links directly or indirectly to a specific participant will be redacted. Because these materials may potentially contain information of a sensitive nature, including issues of identity and work, participants will be asked to review de-identified materials prior to being added to the project website for any additional details that should be redacted.

How will you address the sustainability of your digital products?

The project website will be hosted permanently by USC's College of Information and Communications on a stable sc.edu URL. All digital outputs will remain permanently on this website. Research products will be permanently housed in USC's Scholar Commons. Other products will be preserved only through the duration of the project, including communications among the research team and drafts of papers.

Data Management Plan

Identity-Based Routines in the Public Library: Structuring the Workplace to Better Support Staff with Diverse Identities

Identify the type(s) and estimated amount of data you plan to collect or generate, and the purpose or intended use(s) to which you expect them to be put. Describe the method(s) you will use, the proposed scope and scale, and the approximate dates or intervals at which you will collect or generate data.

Study Data	Description	Format
Data Collection Instruments	Audio diary packet (1); interview guide (1); demographics questionnaire (1); participation evaluation questionnaires (2); workshop evaluation questionnaires (2); professional development course evaluation questionnaires (2)	.txt, PDF
Study Data	200 audio diary transcripts (40 participants X 5 entries); 40 interview transcripts; demographics data from 40 participants; observational notes from 8 participatory design workshops; reflexivity journals; 140 participation evaluation questionnaires; 140 workshop feedback questionnaires; professional development feedback questionnaire (TBD)	.txt, PDF
Template Codebook	Full template used to code diary and interview transcripts.	.txt, PDF

Data collected during stage 1 (August 2023-July 2024) include staff audio diaries and interviews. These will be collected to learn how library routines are experienced by staff, the affordances and disaffordances of these routines, how staff perform these routines, and staff perceptions of the impact of their performance. These data will inform the development of participatory design workshops in Stage 2.

Data collected during stage 2 (August 2024- July 2025) include observational notes made by the research team during participatory design workshops. These notes will inform the development of reports sent to participants after each workshop. Analysis of these notes will inform the creation of professional development courses in stage 3. During Stage 2, the project will also collect questionnaire responses from participants that enable an evaluation of participant efforts—including levels of interaction and collaboration—and provide the project team with participant feedback. This will support the continued refinement of the workshop designs.

Data collected during stage 3 (July 2025-June 2026) include responses from participants after completion of the management and staff professional development courses. This will enable the project team to evaluate the success of the courses in meeting the stated learning outcomes and revise these courses as necessary. These data will inform the development of the 3-credit hour course included as part of USC iSchool's diversity certificate.

Will you collect any sensitive information? This may include personally identifiable information (PII), confidential information (e.g., trade secrets), or proprietary information. If so, detail the specific steps you will take to protect the information while you prepare it for public release (e.g., anonymizing individual identifiers, data aggregation). If the data will not be released publicly, explain why the data cannot be shared due to the protection of privacy, confidentiality, security, intellectual property, and other rights or requirements.

Following IRB protocols, the project team will inform participants about the intended uses of their data—as well as plans to preserve and share their data—and request participant consent. A note will be included when a participant does not consent to have their data made available, e.g., individual interview transcript 10 is not available. Prior to uploading study data, identifiers that could endanger participant confidentiality will be removed. This includes direct identifiers (e.g., names, addresses) and indirect identifiers (e.g., where they work, where they live, when they participated). Demographics data will only be shared in the aggregate. Because workshop and participatory design questionnaires are only used as an internal evaluation measure, they will not be made publicly available.

What technical (hardware and/or software) requirements or dependencies would be necessary for understanding retrieving, displaying, processing, or otherwise reusing the data? How can these tools be accessed (e.g., open-source and freely available, commercially available, available from your research team)?

Data will be added as open-source and every effort will be made to convert proprietary file formats (DOC, DOCX) into accessible ones (.txt, PDF) that can be accessed by several software products.

What documentation (e.g., consent agreements, data documentation, codebooks, metadata, and analytical and procedural information) will you capture or create along with the data? Where will the documentation be stored and in what format(s)? How will you permanently associate and manage the documentation with the data it describes to enable future reuse?

USC is a member institution of the Inter-university Consortium for Political and Social Research (ICPSR). ICPSR will create substantive metadata in compliance with the most relevant standard for the social, behavioral, and economic sciences—the Data Documentation Initiative (DDI). This XML standard provides for the tagging of content, which facilitates preservation and enables flexibility in display. These types of metadata will be produced and archived:

- Study-Level Metadata Record. A summary DDI-based record will be created for inclusion in the searchable ICPSR online catalog. This record will be indexed with terms from the ICPSR Thesaurus to enhance data discovery.
- Data Citation with Digital Object Identifier (DOI). A standard citation will be provided to facilitate attribution. The DOI provides permanent identification for the data and ensures that they will always be found at the URL specified.
- Variable-Level Documentation. ICPSR will tag variable-level information in DDI format for inclusion in ICPSR's Social Science Variables Database (SSVD), which allows users to identify relevant variables and studies of interest.
- Technical Documentation. The variable-level files described above will serve as the foundation for the technical documentation or codebook that ICPSR will prepare and deliver.
- Related Publications. Resources permitting, ICPSR will periodically search for publications based on the data and provide two-way linkages between data and publications.

What is your plan for managing, disseminating, and preserving data after the completion of the award-funded project? If relevant, identify the repository where you will deposit your data. When and for how long will data be made available to other users?

ICPSR will make the research data from this project available to the broader social science research community. Public-use data files may be accessed directly through the ICPSR website. After agreeing to Terms of Use, users with an ICPSR MyData account and an authorized IP address from a member institution may download the data, and non-members may purchase the files. Restricted-use data files are distributed in those cases when removing potentially identifying information would significantly impair the analytic potential of the data. Users (and their institutions) must apply for these files, create data security plans, and agree to other access controls.

ICPSR will accept responsibility for long-term preservation of the research data upon receipt of a signed deposit form. This responsibility includes a commitment to manage successive iterations of the data if new waves or versions are deposited. ICPSR will ensure that the research data are migrated to new formats, platforms, and storage media as required by good practice in the digital preservation community. Good practice for digital preservation requires that an organization address succession planning for digital assets. ICPSR has a commitment to designate a successor in the unlikely event that such a need arises.

When and how frequently will you review your Data Management Plan? How will the implementation be monitored?

The principal investigator will have overall responsibility for data management over the course of the research project and will monitor compliance with the plan. The PI will ultimately transfer responsibility for data management to the Inter-university Consortium for Political and Social Research (ICPSR). The project team will review this data management plan at the conclusion of each project year.

Organizational Profile

Identity-Based Routines in the Public Library: Structuring the Workplace to Better Support Staff with Diverse Identities

University of South Carolina Mission Statement

The primary mission of the University of South Carolina Columbia is the education of the state's citizens through teaching, research, creative activity, and community engagement. The University of South Carolina Columbia serves a diverse population of students with widely varying backgrounds, career goals, and levels of aspiration. Recognized by the Carnegie Foundation as a top research and community engaged institution, nationally ranked in start-up businesses, and conferring over 30% of all bachelor's and graduate degrees awarded at public institutions in South Carolina, the university has a profound relevance, reach, and impact on the people of the state. The University of South Carolina Columbia leads the way in providing all students with the highest-quality education, including the knowledge, skills, and values necessary for success and responsible citizenship in a complex and changing world through engagement in nationally and internationally ranked research, scholarship, community outreach, and artistic creation (retrieved from https://sc.edu/about/south-carolina-at-a-glance/our_mission.php).

School of Information Science Mission Statement

The University of South Carolina School of Information Science's mission reflects our commitment to encouraging excellence in research and teaching; creating leaders committed to diversity and public service; promoting creativity; and encouraging the development of innovative practices that contribute to the creation of knowledge, advance cultural heritage stewardship, and improve our understanding of the important roles that libraries, information, and technology play in an empowered global society (retrieved from https://sc.edu/study/colleges_schools/cic/library_and_information_science/about/mission.php).

Service Area

Today, the University serves the entire state and includes, in addition to the Columbia campus, three four-year campuses (Aiken, Beaufort, and Upstate) and four regional campuses offering primarily two-year programs (Lancaster, Salkehatchie, Sumter, and Union). Enrollment on all campuses totals more than 40,000. With a flagship campus recognized by the Carnegie Foundation as a top research and service institution and nationally ranked in start-up businesses, and an eight-campus system that confers nearly 40% of all bachelor's and graduate degrees awarded at public institutions in South Carolina, the University has a profound relevance, reach, and impact on the people of the state. Enrollment on all campuses totals more than 40,000. (retrieved from <http://bulletin.sc.edu/content.php?catoid=66&navoid=1811>).

Organizational History

Founded in 1801, the then-named South Carolina College flourished pre-Civil War, overcame postwar struggles, was re-chartered in 1906 as a university, and transformed itself as a national institution in the 20th and 21st centuries. In its 50th year, the School of Library and Information Science boasts a current enrollment of approximately 350 undergraduate and graduate students, a close partnership with the South Carolina Center for Community Literacy, and the University of South Carolina's literacy outreach program, Cocky's Reading Express.