

Transcript: Making Change from Within: Integrating Accessibility into Strategic Planning and Assessment

Introduction

Hi everyone, and welcome to our presentation on Making Change from Within: Integrating Accessibility into Strategic Planning and Assessment. We are happy to be with you today from the Montana State University Library in Bozeman, Montana.

I am Jacqueline Frank, and I am the Instruction and Accessibility Librarian. My focus is in advancing accessibility through the lens of diversity, equity, and inclusion, by promoting Universal Design for Learning in our instruction efforts and public services.

Hi everyone, and I am Scott Young. I am the user experience and assessment librarian at MSU, so I focus on UX and assessment. I also do service design, and I think about professional ethics. Therefore, you can see that Jacquie and I are great collaborators for bringing together accessibility and assessment in our library, and we are happy to be here today to talk to you about it.

Outline

To get us started today we will go over a brief outline, and then pose some framing questions to think about throughout the rest of the presentation.

After the framing questions, we'll give an overview of the evolution of Accessibility efforts at the MSU Library, discuss how we've integrated accessibility into our Library Strategic Plan, show our strategic plan in action with specific examples of our initiatives and progress, talk about some of the challenges and limitations, and then leave you with some possible ideas of how UX and accessibility work can fit into many different areas of an institutions existing strategic plan, so that you have an idea of how you can do this at your various institutions.

First, we would like to acknowledge that accessibility is more than compliance—it is a commitment to the professional values of access, diversity, and social responsibility. However, accessibility work often involves changing the status quo of operations, and many times barriers can get in the way of us from making change and realizing the promise of accessibility.

So how do we find actionable ways to confront these barriers, work within our existing structures, and realize our values? We would like to offer one answer to that question.

By realizing that we operate within different contexts and complicated systemic challenges, and that we are necessarily working from within that context, we have taken advantage of our library strategic plan and used it as a mechanism to propel and assess our accessibility efforts. Strategic planning is a common apparatus within our higher education context, and we show how it can be used to advance accessibility and improve the user experience.

We will speak from our perspective of using the Balanced Scorecard, which is a specific structure for strategic plans, and share our strategies for **making change from within, by integrating accessibility into library strategic planning and UX assessment efforts**. Then to extend the reach, we will discuss how UX and accessibility work can fit into many different areas of various strategic plans.

Framing Questions

As we start to move ahead, we would like to offer a few framing questions to help prompt your thinking and to show where we are headed. We will also offer our conclusion up front here, so you can see where we will end up, and then we will connect the dots along the way.

Therefore, as we move forward, we would like you to keep in mind questions like:

- What are the main barriers you face at your institution in implementing accessibility?
- What is your library's culture of planning and assessment?
- Where is accessibility work happening in your library?
- How can this work be aligned—your projects, your library's strategy, and your university's mission?

Main Takeaways

Our main takeaways for today, if we were to summarize our message, it would be that you may already be doing accessibility – you probably are, since you are here – and you may already have a strategic plan at your library that you may already be a part of. Therefore, our main takeaway is that by integrating accessibility into your library's strategic plan it can align interests and help you accomplish accessibility.

Accessibility at Montana State University

So now, we are going to talk about how we have done that at our Library, and we will start by giving a very brief history of accessibility at Montana State University.

Before accessibility was officially tied to our Strategic Plan, we already had the values of DEI at our institution and in our library, but we did not have a specific plan on how to execute on those values. That is not to say that work was not already happening in these areas, because efforts were indeed already happening in various areas. However, that accessibility work was distributed and scattershot, or happening under the radar without much awareness from others across the library. Mostly people had chosen to incorporate accessibility work because they wanted to or saw the importance, not because it was officially in their job description or duties.

This may sound familiar to you, and is a common place to be for many libraries and institutions. That is ok, because accessibility work often happens without a strategic plan, or outside of a strategic plan.

However, we have found that by tying accessibility initiatives directly to the strategic plan, it can help focus the work, raise awareness, and bring resources to the work that is taking place.

So how and why did accessibility ultimately get integrated into our strategic plan? Like I said, the MSU Library and Montana State University as an institution already had expressed and written values of diversity, equity, and inclusion.

Considering that accessibility supports the foundation of DEI, combined with a new institution-wide web accessibility policy that outlined compliance standards, and specific dates on a multi-year timelines for meeting those standards, it created a need for leadership and dedicated time for accessibility work.

This led the MSU Library to fill a vacant faculty position, but with a new focus in accessibility. I was lucky enough to be hired for that position in February 2020, as the Instruction & Accessibility librarian, with a

focus in helping our library meet the compliance standards and increasing the accessibility of our library instruction and public services.

Over the last two years part of that work included outlining an accessible content strategy, to support an internal Library Web Content Strategy, which had already been created for our library website.

Therefore, with this in mind, we have decided to tackle a few specific accessibility projects that support our internal content strategy, the MSU Web accessibility policy, and ultimately our institutional values. And we could have continued on, doing this work, knowing it is meaningful and supports these areas and values.

Although we were also looking for ways to organize and report on the work, so we used strategic planning as an established mechanism to help us, by tying these projects to our library's plan as specific initiatives.

And we found that by integrating accessibility initiatives into our strategic plan, it helped focus the work, identify leadership and areas of collaboration, increase resources for the work, even just increased time and support, and ultimately increase awareness of these projects and tell the story of our efforts to improve accessibility, because progress reports on our strategic plan are periodically given to the entire library.

So now Scott is going to give a brief overview of what our library's strategic plan looks like, and then we will take a closer look at three specific accessibility projects we have identified as initiatives under the plan.

[Integrating Accessibility into Strategic Planning](#)

Now I will talk a little bit about how we have integrated our accessibility efforts into our strategic plan, and our library.

At our library, we used the Balanced Scorecard, which is a standard planning and assessment framework. What you are seeing here is the overall structure. It was developed with terminology such as technology and customer, and we adapted it to libraries. It has four main areas to see an organization strategy. None of them outweighs the other, and are all seen as co-equal in terms of importance. The purple is Internal Business, which we have rephrased to Internal Processes. There is Innovation & Learning, which we rephrased to be learning & growth, and the customer perspective we rephrased to the user perspective. Within each perspective, there are a number of goals or objectives that can help accomplish the main things your organization identifies as important under each heading. Then each objective gets one or more measures that helps demonstrate whether progress is being made towards the main goal. So it is multifaceted, and this is just one high level view of it, and it can get pretty complicated which we will see in just a second.

Here is the balanced scorecard for the Montana State University Library. It is a lot of text, and we will not go through every single one. However, this shows the broad scope of strategic planning, and we will talk about our way of making accessibility work within this framework. However, strategic planning is all somewhat similar, and there is a way to be flexible and adaptable and help accessibility find a way into it. Our way of creating this, we hired a consultant who joined our organization for a few months, and we had a collaborative, participatory process for co-authoring this strategic plan. Therefore, there was a lot

of opportunity to contribute to the plan, and see ourselves in the plan, and that helped us get accessibility in here in the first place.

Therefore, I will take us through step by step, for how accessibility fits into our plan. Here is the mission that we articulated for the library: We support and advance teaching, learning, and research for Montana State University and the people of Montana by providing access to information and knowledge.

Then under the internal processes perspective, we articulated a goal saying: We will create useful, dynamic, and accessible digital and physical spaces. We articulated this goal, which then supports the mission from the internal processes perspective. We also were able to create these different parts of this goal, including accessibility, which we focus into and were able to put that into the plan, which creates all the possibility for developing accessibility within the strategic planning framework.

We also got creative under the user perspective, where as a strategic objective we said that users would interact with a welcoming and responsive physical and digital library environment. Even though accessibility does not appear directly here, in our work we have interpreted welcoming and responsive to fall within an accessibility frame of mind, so this allows us to match our internal processes with what our users perceive. Therefore, we are connecting dots within our strategic plan, around accessibility.

The specific accessibility initiatives that have developed from this language are that we have hired an Accessibility Librarian; we have started to conduct accessibility testing for Digital Spaces; likewise, with the physical spaces, we have conducted a Physical Space Accessibility Audit; we are conducting UX projects with students with disabilities; and we have a robust approach for internal communications and reporting.

Strategic Planning in Action

Yeah, thanks Scott. So now, we are going to dive a bit deeper into those few initiatives that Scott just mentioned, and how they support the higher objectives and measures of our plan. We will look at the data we have collected, and how we are analyzing and reporting out on our progress.

Our strategic plan also identifies what we would like to measure for each objective. Under the objective to create useful, dynamic, and accessible digital and physical spaces, our measures include Physical ADA Compliance, and Digital Accessibility. In addition, under the objective to have users interact with a welcoming and responsive physical and digital library environment, our measures include Website UX.

Under those measures, we have identified three specific accessibility projects as initiatives for our strategic plan. Those include 1) conducting a Physical Space Accessibility Audit, and 2) Accessibility Testing for Digital Spaces to meet compliance standards, which involves testing, identifying, and addressing accessibility improvements on our website, both of which fall under the objective for creating accessible digital and physical spaces, and 3) conducting a website user experience project with students with disabilities, which falls under the objective to interact with a welcoming and responsive digital library environment.

So let's take a look at the data we have collected, and how we are analyzing and reporting out on it.

We are planning to conduct a project on website user experience with students with disabilities, and are planning to collect data in the spring of 2022. We will ask participants to complete eight (8) tasks using

the Library Web site, and the data we will collect will be the task success rate, and pain points that users express or are observed. We will also ask participants to complete a survey on usability, appearance, loyalty, trust, & emotional response using the SUPR-Q & SAM scale. The data we will collect from that portion will be their survey responses on usability. We will then compare the results from similar study in 2017 to identify themes, recommended improvements, and next steps.

For the physical ADA compliance audit we conducted, we used two tools specific to libraries to walk around our building and answer 125 different questions related to space requirements.

This is an example of what the IFLA Access to Libraries for Persons with Disabilities Checklist looks like, with bulleted lists broken out into sections for getting into the library, and access to materials and services, for example.

This is an example of what the Project Enable ADA Library Accessibility Checklist looks like, which is outlined in more of a spreadsheet view again broken out into different sections, but with columns for comments, and a clear yes/no answer of if it meets compliance.

We created our own, combined spreadsheet, with all 125 questions that were compiled from the two tools. We also identified five (5) levels of compliance that we will use to track our progress over time: 1) meets compliance; 2) meets minimum compliance but an improvement was identified, 3) meets minimum compliance and an improvement was already completed (which helps track our improvements over time) - those three all make up the first chart on the left. Level 4) is does not meet compliance but we provide an alternative accommodation, which is the middle chart, and level 5) does not meet compliance, with notes about what needs to be done to improve it. Laying out the number of items in each of these categories in these three charts helps show that we are almost fully compliant, and the few items where we are not are due to an old building with a split-level first floor.

Beyond compliance, we identified Forty-eight (48) improvements in our project report, six (6) of which we immediately completed. For example, lowering our public printers to ensure adequate knee space underneath. The remaining forty-two (42) are more costly or difficult, for example adding a restroom to 1st floor because without power, there are no accessible restrooms on the main level.

We completed the original 2.1a initiative by simply conducting the audit. However, moving forward we plan to outline a new initiative, to implement the improvements and track our progress of over time.

For our initiative to test our digital spaces for accessibility, namely the library website, we are using an accessibility checker that is built into our website CMS. This allows us to conduct a website inventory of each webpage, and identify all accessibility errors/tasks on those webpages. Therefore, we have created a spreadsheet listing every webpage, and the number of accessibility tasks on each page, and we are working to address any accessibility errors/tasks we find on the website.

That spreadsheet looks something like this, with the page URL listed, who created or updates the page content, and if there are any accessibility errors or improvements.

Then we summarize the results of that table into a few final charts. The CMS inventory chart shows that we have looked at all webpages across our library website, and the CMS Accessibility Tasks chart shows the number of errors or tasks identified and how many have been completed.

Therefore, now that we have seen some of the details of these three initiatives, including the data we are collecting and tracking, and how we are reporting on our progress, Scott is going to talk about some of the successes and challenges along the way.

Successes and Challenges

I am going to summarize what we have seen as success and challenges to strategic planning. When we encourage you to think about incorporating accessibility into your own strategic planning, we are thinking of Strategic planning at the highest levels, which can be thought of as setting goals, and measuring progress. If your goal at your university or library is to implement accessibility, the strategic planning framework can help you do that. So we will see what we have seen go well, and what could be better.

So in terms of successes, one of the biggest successes we have seen, is in alignment of bringing together different stakeholders and goals into a common ground. The strategic plan is a map that shows where we are all headed together, and when accessibility is in that map, it can be great because everyone can see where we are headed together and support the work together. That includes library administration, university administration, and different units across campus, and librarian and staff interests. We are all here today doing accessibility because we believe in the work, and having that work be recognized in the strategic plan can be powerful by making that work visible in the plan. Then our users who want to access our spaces and digital materials, in an accessible way. So speaking to these interests in a plan is possible, and that alignment can supercharge accessibility.

We have seen that project planning can be structured into strategic planning. There are ways to be creative and interpretive within the strategic planning framework, so discrete accessibility projects can be integrated into the broader framework, which can help make forward progress. Then intentionally integrate accessibility into the strategic plan, can raise the visibility of the work. We have seen that first, there is an awareness, and then resources come from that awareness. That can be incredible valuable for getting accessibly work done, just getting resources behind it. We have created a new position in our library, in that sense we have a budget behind accessibility, which is awesome. Jacquie, as a part of her work in that role, regularly updates the library about accessibility progress, so people are thinking about it, Jacquie is activating people throughout the library through workshops and other trainings, and so accessibility work is really happening, and then it's been sort of credited through strategic planning. To summarize, leveraging the tools and priorities of strategic planning can amplify accessibility work.

This approach is not without its challenges. Strategic planning can be complicated, which we referenced earlier, but there is a complexity to it with so many stakeholder interests and perspectives. That is sort of the other side of the coin of alignment, which is the work of actually aligning all of those different perspectives. Accessibility is just one part of a broader plan, so there are questions about how the plan administered, and who is responsible for the big picture and all the different moving parts? Accessibility may be one part of the broader plan, so how does your accessibility work fit in and correspond to the other parts. How big is the strategic plan, and what is the organizational capacity to fulfil the strategic objectives that have been identified? You saw above that we have several goals articulated. We have a seven (7) year plan, so we try to create a prioritization where we identify a subset of goals to focus on for a certain year, so there is some additional work there to see if and where accessibility falls within those priorities. This all to say that the culture of planning assessment can be variable. There can be

different organizational interests and capacities to actually do this work, but if the capacity is there, and a strategic planning framework, then there can be some big wins for accessibility.

Extending Accessibility

Before we leave, we also want to make it clear how you can do this at your library. Going back to our main takeaways: that you may already be doing accessibility work, you may already have a strategic plan, and by integrating accessibility into your library's strategic plan it can align interests and help you accomplish your accessibility goals, we'd like to offer some examples of how you might be able to integrate accessibility into your strategic plan.

We have shown you just one example of how we used our library strategic plan to do this, which has worked well for us. However, that is only one strategic plan, and we already had accessibility written into it explicitly. So what if you already have a strategic plan, that does not include accessibility? How can you integrate accessibility anyway, and tie it to the existing plan? We believe that accessibility can fit under many broad areas that might already be included in your institutions strategic plan, including Diversity, Equity, and/or Inclusion efforts, Improving Physical Spaces, Improving the User Experience, Improving Digital Resources and/or the library website, supporting student information literacy, and more. Bottom line, get creative or brainstorm with someone else, because there is likely a place that accessibility can fit.

Conclusion

Thank you for joining us today, and we hope you have found our presentation useful.

We would like to offer the framing questions again as a place to start our discussion. What are the main barriers you face at your institution in implementing accessibility? What is your library's culture of planning and assessment? Where is accessibility work happening in your library? How can this work be aligned—your projects, your library's strategy, and your university's mission?

With that, what are your thoughts, and what questions do you have for us?