

Forum 1: Crisis Management in Libraries, Archives, and Museums

On January 26, 2022, OCLC hosted 23 participants for the first in a series of three online REALM Forums. Among the participants, 11 represented libraries, 4 represented archives, 5 represented museums, 1 represented a library service organization, and 2 represented IMLS.

This Forum was designed to facilitate a discussion about the information and resources cultural heritage institutions need—and in what format—to prepare for, navigate through, and recover from public health crises. The input from the discussion is being used to inform the development of crisis management toolkit resources for libraries, archives, and museums.

The agenda items covered over the course of the two-hour event included:

- Welcome
- Warm up breakout session
- World Café discussion
- Toolkit format discussion
- Final Reflections and next steps

World Café

The overarching discussion question for the World Café was, “What information resources do you need that will help your institution/organization plan for, navigate through, and recover from this and future public health crises?”

A three-round [World Café](#) format was used to support structured, collaborative gathering of insights and perspectives. OCLC assigned participants to four smaller breakout rooms in rounds 1 and 2. Each respective breakout room was moderated by an OCLC staff member and covered a topic related to the overarching question above. The four topics were (1) Decision-making; (2) Leading staff and public; (3) Facilities and operations; and (4) Resource networks. After a brief break, the four room facilitators shared with the full group highlights from the previous two rounds of discussion. For the final round, participants were divided among five rooms and prompted to raise any points that they felt were missing from the discussion thus far.

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Summary of World Café Discussion

The following summary synthesizes notes from each breakout room over the course of all three rounds of the World Café. While there was not one response or experience that was common to all participants, the collective discussion outlined some emerging practices and recommendations for crisis management in LAMs.

What has been useful

- Having networks and partnerships already in place *before* a crisis hits.
 - Being part of local, state, and national networks, through which to receive and share information, especially when information is scarce or unevenly distributed.
 - Having access to trusted advisors and subject matter experts who can provide guidance and resources to inform decision-making. Drawing upon established relationships with public health departments made it possible to access the needed information more quickly.
 - Having a network of peers with whom to share and discuss experiences; such meetings with peers functioned like “group therapy” sessions, helping one to feel connected, heard, and supported. Having a “crisis buddy” that one can reach out to at any time.
 - Being part of a professional network, such as with others who work in cultural heritage institutions, to share and learn about emerging best practices.
 - Having connections to other local institutions with which to coordinate a unified message to city management and with which to work to localize information coming from state or federal government.
- County and/or city public health departments that supported their institution by
 - Being a go-to resource for local data, guidance, communication resources, expertise, or
 - Helping to prepare their institution to serve as testing and/or vaccine site.
- Listening to staff and community members to inform decision-making. Keeping close to the “front lines” to understand what staff and community members were experiencing and how that changed over time; avoiding making assumptions or decisions without fully understanding these contexts.
- Having a clear decision-making hierarchy and communication structure in place. Because decisions needed to be made and communicated quickly, all stakeholders needed to understand who was responsible for doing so and which information

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sources to draw upon (e.g., local data, state directives, CDC guidance). Documentation helped bring clarity to these processes.

- Having a documented disaster or emergency response plan. Even though these plans didn't include pandemics as a specific example, they provided an important foundation to build on. Plans included communication protocols, contingency-based decision-making, and emergency contacts. Staff at some institutions were already trained in emergency response scenarios.
- Having sector-specific information resources, such as those distributed by the REALM project, that consider the distinctive characteristics and needs of these institutions.

Specific resources mentioned

- [Alliance for Response Networks](#)
- CDC guidelines (specific area was not mentioned)
- Canadian collections managers of public libraries group
- [Canadian Urban Libraries Council \(CULC\)](#)
- Connecticut Library Consortium (CLC) [Roundtables](#)
- [Council of State Archivists \(CoSA\)](#)
- Culture@3, NYC
New York Times: ["The Daily Call That 20 Arts Groups Hope Will Help Them Survive"](#)
- [Event Safety Alliance](#)
- [HATHI Trust's Emergency Temporary Access Service](#)
- [International Federation of Library Associations and Institutions \(IFLA\)](#)
- [KC Culture Cares](#)
- Market research from [Wolf Brown](#) and [Slover-Linnett](#)
- [Performing Arts Readiness](#)
- State-wide Listservs (specific one not mentioned)
- [REALM studies](#)
- [San Diego Museum Council](#)

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What was learned

- Make decisions more quickly, iteratively. This was a change from what many indicated had been their institutions' standard approach to decision-making: thoughtful, with much time taken to gather and analyze input, build consensus, and explore potential scenarios.
- Don't try to anticipate all the outcomes in advance. With the limited information and swiftly changing circumstances that come with a pandemic, leaders learned to let go of trying to predict the future and make choices based on the most likely scenario.
- Be nimble and adapt. Leaders realized that they couldn't make a decision and simply stick to it. They had to adjust to the constant need to reassess and shift plans in response to new information or changing circumstances. Networks also adapted to meet the evolving needs of its members; for example, a network initially focused on sharing information about the spread of COVID-19 later transitioned to discussing pandemic fatigue and staff turnover.
- Prioritize staff safety first and foremost. At the outset of the crisis, many institutions leaned into their community-centered mission and reorganized staff and services to meet the emerging needs of the public. But as at the pandemic's scope and duration took its toll, leaders shifted to offering public programs and services that would not jeopardize staff members' health or accelerate staff turnover.
- Active two-way communication channels are essential. Information has needed to flow continuously from leadership to staff, and from the institution to the public. Transparency about what is known and unknown is preferable to silence or a lack of communication. Leaders have to be comfortable saying, "I don't know" instead of waiting until they could collect additional information, and they must "over-communicate" to reinforce key messages. Create space and opportunity for people to share their experiences and ask questions. Even if everyone is tired of talking about COVID-19, we must continue to address it.
- Working in an office together is not essential. There was an adjustment period as staff had to adapt to working together in new ways, but much work has been done effectively despite the transition to working remotely for many. There have been negative impacts on staff morale, especially at the outset when people felt isolated from their work colleagues.

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Some of the challenges

- Finding common ground with partners. Participating in a broad network of varied organizations meant learning about the differences among their missions and goals, their particular jargon or different definitions of the same term (e.g., libraries, archives, museums, government agencies, and emergency responders use a range of terms—patron, user, visitor, community member, audience, public—to describe the people and groups they serve).
- Government misalignment. Many institutions are in communities where state-level policy decisions and mandates were misaligned or in conflict with those at the local or tribal government level. This disconnect increased the complexity and challenges for legal and HR departments, and in communicating with staff and the public.
- Decision-making dynamics. Changes in decision-making power occurred over the course of the pandemic. Several participants described a top-down decision-making hierarchy through earlier phases of the crisis, where government mandates were issued, and institutions just had to execute accordingly. But later in the pandemic, as mandates were lifted and vaccines and variants became more prevalent, more institutions have been left to their own devices to determine how to proceed. For some university library representatives, they experienced the opposite: they were more empowered to make decisions for the library at the outset; but university administrators took a more top-down approach when planning for the 2021 academic year.
- All the unknowns. Leaders are having to lead, make decisions, and communicate amid unprecedented uncertainty.
- Balancing conflicting needs. The pandemic produced a growing tension between staff needs and community needs. Staff expected safe working conditions; the public wanted institutions to remain open and provide the usual services. Navigating these often conflicting needs continues to be a significant challenge.

Resources that are still needed

- Resources and tips for finding, building, developing networks
- Concise, accessible, regularly updated information resources
- Information specific to LAM contexts
- Examples of what peers are doing
- Crisis management training

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- Resources and templates that can be used by institutions without HR, IT, Legal staff
- Cross-training; cultivating decision-making skills at all levels
- Decision-making structure templates with an equity-informed approach
- Mental health supports

Toolkit Format recommendations

- Include printable materials that can be kept in a three-ring binder so that there are resources that aren't dependent on the internet for access at the point of need. Include information that can be disseminated to the public.
- The content should be concise, with ready-to-use information for institutions of any size, including those without specialized staff such as IT, Legal, or Human Resources.
- Provide examples, such as descriptions of how different organizations have adapted to their specific contexts. Include information from other industries that are experienced with crisis management while noting where there may be differences in mission or priorities in these other sectors.
- Make it customizable, so that institutions can build their own local resource network and adapt the materials for their local settings.
- Keep it up to date. Consider forming a user group for the toolkit to provide feedback and suggestions for ongoing revisions.

Final reflections

The Forum concluded with an open prompt for participants who would like to share any reflections or “a-ha” moments from the discussion. Several participants shared an idea or action step they were taking with them from the Forum.

- Build your network before you need it.
- Document our crisis decision-making processes *now*, so that we'll have it for next time. Providing a narrative about how and why we made our decisions will be valuable to our future selves.
- Rethink who our peers are—not just organizations like us, but organizations *near* us. Expand our community outreach and connection.
- Connect with different organizations in close proximity to us; they understand our hyper-local context.

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- Consider who our partners and collaborators are and include more folks who are different from us so that we can learn from them.
- Reach out to partners who are in the for-profit sector, such as vendors, for support and resources.

As the final activity, participants were invited to type a word into the Chat to describe how they felt in that moment. “Connected” was the most-used word.

Connected	Networked	Appreciation
Grateful	Reflective	Connected
Community	Understood	Sharing
Exhausted	Optimistic	Connected
Encouraged	Not alone!	Hopeful
Informed	Together	
Hopeful	Supported	

Next Steps

REALM Toolkit editors are using the input from these discussions to review toolkit materials to determine what will need to be updated, expanded, or replaced; crowd-source other external resources that can be repurposed; and develop the organizational structure for the toolkit.

A summary of the Forum was presented to the REALM Executive Project Steering Committee and Joint Working Group, in a slide deck format, during the early February meetings of those groups. The final version of this summary will be circulated to those stakeholders, Forum participants, and posted to the REALM website.

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Forum 1 prompts

Warm up discussion

- What do you need to let go of to be fully present for the next two hours?
- What questions are you bringing to this Forum?

World Café discussion

Decision-making

- What information resources would be useful for future public health crises?
- What information resources have you found helpful during the pandemic?
- How did your approach to decision-making shift during this crisis?

Leading Staff and Public

- What information resources would be useful for future public health crises?
- What information resources have you found helpful during the pandemic?
- How did your approach to leadership shift during this crisis?
- What resources would help you make changes during future public health crises?

Facilities and Operations

- What information resources would be useful for future public health crises?
- What information resources have you found helpful during the pandemic?

Resource Networks

- If you participated in a resource network, what resources, tips, techniques were useful for this?
- Do you have examples of effective resource networks?
- What resources could help you with building resource networks?

What is missing

- What is missing that would make this more achievable?
- How can these resources be more accessible and relevant to more people?
- What hasn't been asked yet?
- Whose perspective is missing?

Toolkit format discussion

- What resource formats have you found useful during the pandemic?
- For you to consider a LAM public health crisis management toolkit to be useful, what would it need to do for you?
- How would a toolkit need to function for it to be useful?

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- What would be the key elements of a useful playbook?

Final Reflection

- What is one idea or action step you are taking away from this Forum?
- What is one word to describe how you are feeling right now?

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