

EDI Institutional Assessment Pilot Evaluation Report

Prepared for LibraryLinkNJ, NJLA, and the NJ State Library by Ozy Aloziem (Heal Inc. LLC), July 2026

Pilot Background

The New Jersey EDI Institutional Assessment Pilot Project was developed to support libraries in assessing how equity, diversity, and inclusion (EDI) commitments have been operationalized within their organizations. Rather than measuring individual beliefs or organizational intentions, the assessment focuses on the extent to which EDI principles have been embedded into organizational policies, practices, structures, systems, and decision-making processes. Equally important, the assessment was designed to serve as a catalyst for organizational reflection by prompting meaningful conversations about existing strengths, opportunities for growth, and priorities for future action.

The pilot originally set out to recruit 10 libraries; 8 joined the cohort. One of the 8 (a school library) withdrew during the pilot due to capacity constraints, though it intends to apply the insights and resources from the assessment, debrief, and cross-library workshop to its own setting going forward.

The remaining 7 libraries completed the full pilot, including all strategy sessions, and each built an EDI workplan containing at least 2 goals. Approximately 32 individuals took part in the project overall across onboarding, the cross-library workshop, the assessment debrief, and strategy sessions. Of the 7 libraries that completed the pilot, 6 were invited to complete this evaluation survey; the seventh was still finalizing its workplan at the time this report was created and was not yet included.

Executive Summary

Eighteen participants representing public and academic libraries and multiple organizational roles completed the pilot evaluation survey following their participation in the New Jersey EDI Institutional Assessment Pilot Project, which included an onboarding session, the completion & submission of the New Jersey EDI Institutional Assessment tool, a cross-library workshop, an assessment debrief, and a series of strategy sessions. Participating libraries evaluated both the assessment tool and the accompanying consulting and strategic planning process.

Overall, participants reported overwhelmingly positive experiences. Across every measured dimension of the pilot, from the assessment tool itself to the facilitation and consulting process to the outcomes participants take away, average ratings fell between agree and strongly agree (4.0–4.6 on a 5-point scale). The strongest results were process-related: prioritization activities (mean 4.61) and consulting support (mean 4.56) were the two highest-rated elements of the entire pilot, and 88% of respondents said they would recommend the assessment to other libraries. The area with the most room to grow is the scoring system itself, which received the lowest mean of any item (3.89) and drew the most consistent qualitative feedback: participants want more flexibility to skip domains outside their control (facilities, board-level policy) and lighter question volume.

Qualitatively, participants converged on three themes: the value of a facilitated, cross-departmental conversation about EDI; the practical utility of the SMARTIE goal framework and prioritization activities for turning reflection into action; and a recurring structural barrier — the assessment covers domains (facilities, county/board-level policy) where frontline and mid-level staff lack authority to act, which can inflate the sense of an unaddressed gap. Recommendations for scaling the assessment statewide and replicating the pilot follow the findings below.

Respondent Profile

Library Type

Library Type	n
Public	15
Academic	3

Participant Role

Perspective	n
Leadership / Administration	6
Librarian	5
Frontline Staff	4
Supervisor / Manager	2
Administration Assistant	1

Sessions Attended

Most respondents attended 3–4 of the pilot's sessions (including the onboarding session, the cross-library workshop, the assessment debrief, and the strategy sessions); several attended all 7 sessions.

Sessions Attended	n
3–4 sessions	10
5–6 sessions	4
7 sessions	4

Quantitative Findings

All items used a 5-point scale (1 = Strongly Disagree, 5 = Strongly Agree). "% Agree/Strongly Agree" reflects the share of respondents selecting either of the top two options.

The Assessment Tool

Item	Mean (1–5)	n	% Agree/Strongly Agree
Assessment instructions were clear and easy to understand	4.17	18	89%
Assessment questions were relevant to our library's work and context	4.33	18	95%
Assessment helped identify organizational strengths	4.44	18	94%
Assessment helped identify opportunities for growth	4.44	18	94%
Assessment prompted meaningful discussion among staff	4.33	18	95%

Item	Mean (1–5)	n	% Agree/ Strongly Agree
Scoring system helped us understand our current level of EDI implementation	3.89	18	72%
Assessment findings provided useful information for strategic planning	4.29	17	88%
Would recommend this assessment to other libraries	4.47	17	88%

The assessment tool was well received overall and viewed as relevant, accessible, easy to use, and aligned with the realities of library work. The strongest agreement was on its ability to surface organizational strengths and growth opportunities (both mean 4.44; 94% agree). One of the primary goals of the pilot was creating space for institutional reflection rather than simply generating scores, and participants indicated the assessment successfully accomplished this objective. The scoring system was the single lowest-rated item in the survey (mean 3.89, 72% agree) — consistent with open-ended feedback that scoring can feel misaligned when EDI practices exist informally, outside written policy, or in domains (like security and facilities) the library doesn't control.

Facilitation & Consulting Process

Item	Mean (1–5)	n	% Agree/ Strongly Agree
Debrief process helped our team better understand our results	4.11	18	89%
Facilitated discussions helped us reflect on EDI strengths/challenges	4.22	18	89%
Prioritization activities helped identify realistic areas for action	4.61	18	100%
SMARTIE goal framework was useful for developing meaningful goals	4.44	18	94%
Strategic planning sessions helped us move from reflection to action	4.33	18	89%
Consulting support was valuable to our library	4.56	18	89%
Overall pilot process was well organized and easy to navigate	4.17	18	89%

This was the pilot's strongest-performing section. Evaluation results demonstrate that libraries valued the facilitated implementation process as much as, and often more than, the assessment itself. Prioritization activities (mean 4.61; 100% agree) and consulting support (mean 4.56; 89% agree) were the two highest-rated items across the entire survey, which reinforces that structured facilitation, not just the assessment instrument, is central to the pilot's value.

Reported Outcomes

Item	Mean (1–5)	n	% Agree/ Strongly Agree
Clearer understanding of our library's EDI strengths and gaps	4.28	18	83%
Feel more prepared to advance EDI work within our library	4.17	18	78%

Item	Mean (1–5)	n	% Agree/ Strongly Agree
Have a clearer roadmap for future EDI efforts	4.17	18	78%
Prepared to begin implementing goals developed through this process	4.39	18	89%

One of the primary objectives of the pilot was helping libraries move beyond assessment toward implementation. Results suggest this goal was largely achieved. Nearly 9 in 10 respondents (89%) feel prepared to begin implementing the goals they developed. Slightly fewer feel fully prepared to advance EDI work broadly or feel they have a complete roadmap (both 78%) — a gap likely tied to the structural barriers described below (director/board non-participation, staffing capacity) rather than to the pilot design itself. Regardless, these findings indicate the pilot successfully increased organizational readiness for future EDI work.

Most Valuable Assessment Sections

Participants were asked to identify the three assessment sections they found most valuable. While some sections were selected more frequently than others, every section of the assessment was identified as a top-three choice by at least one respondent, suggesting that each domain provided meaningful value depending on participants' organizational context and role.

Section	Times Selected
Organizational Culture	11
Workforce Development	9
Programs & Services	8
Community Engagement	7
Leadership & Strategy	6
Collections & Resources	3
Safety, Security & Facilities	2

Library Priority Areas & SMARTIE Goals

Each participating library reviewed its assessment results during a facilitated debrief session and worked collaboratively to identify two to three priority areas for action. During the subsequent strategy sessions, libraries used the SMARTIE framework to translate those priorities into concrete, measurable implementation goals tailored to their organizational context and capacity. These goals represent one of the pilot's primary outcomes, illustrating how libraries moved from assessment to action. While each library's priorities reflected its unique strengths and opportunities, several common themes emerged across participants, highlighting shared areas of focus for advancing equity, diversity, and inclusion in New Jersey libraries.

Identified Priority Areas	Examples of Library Goals
Strengthening EDI Infrastructure & Leadership	Expanding EDI committees, increasing cross-department representation, clarifying committee roles, and embedding EDI into organizational leadership structures.
Staff Learning & Professional Development	Embedding EDI into onboarding, establishing annual learning expectations, and creating equitable professional development systems.
Internal Communication & Staff Engagement	Improving communication systems, increasing staff participation in EDI work, and creating mechanisms for staff feedback and collaboration.
Community Engagement & Responsive Services	Developing structured equity-centered policy review processes and integrating EDI into organizational policies and decision-making.
Language Access & Inclusive Communication	Expanding multilingual resources, improving language access, and developing systems to better support multilingual patrons
Assessment, Evaluation & Data-Informed Improvement	Developing systems to track program participation, collect feedback, and use data to inform ongoing improvements
Staff Well-being & Organizational Support	Strengthening safety protocols, incident response procedures, and staff support systems.
Inclusive Collections & Discovery	Reviewing collections for representation and piloting more inclusive cataloging and metadata practices.
Policy Review & Institutionalization	Developing structured equity-centered policy review processes and integrating EDI into organizational policies and decision-making.

A noteworthy finding is that many libraries prioritized building internal organizational capacity before pursuing outward-facing initiatives. Goals frequently focused on strengthening leadership structures, staff learning, communication, and policy development, reflecting a recognition that sustainable equity work begins with establishing strong internal systems. At the same time, libraries also identified priorities related to community engagement, language access, and inclusive services, demonstrating a commitment to translating internal organizational change into more equitable experiences for the communities they serve.

Qualitative Themes

What Participants Valued Most

Participants' qualitative responses revealed two dominant themes: the value of the consulting relationship itself and the process of moving from organizational reflection to concrete, actionable planning. Several additional themes also emerged across responses.

Structured Organizational Reflection Tool

Participants consistently described the assessment as providing a structured opportunity to pause and reflect on their organization's current EDI efforts. Rather than simply identifying gaps, the assessment helped libraries recognize existing strengths while illuminating areas where additional attention and growth were needed. Respondents appreciated having dedicated time to examine organizational practices, engage in

thoughtful discussion with colleagues, and develop a more comprehensive understanding of where their library was making progress and where future efforts could be focused. Several participants noted that this intentional reflection laid an important foundation for the strategic planning process that followed.

"The survey/assessment tool was so thorough and broken down into groups that made sense. Questions were thought-provoking and seemed to be devised to be answered after a conversation and collaboration"

— Academic library, Leadership/administration

"This was an excellent tool to evaluate our current EDI efforts, while planning specific goals for future EDI work. The sessions helped guide our team towards tangible progress"

— Public library, Frontline staff

Strategic Planning Support

Participants consistently identified the strategic planning process as one of the most valuable components of the pilot. While the assessment helped libraries understand their current state, the facilitated debriefs and SMARTIE goal-setting process helped transform those insights into concrete, achievable action steps. Respondents appreciated that the planning sessions moved the assessment beyond diagnosis, creating productive conversations across departments, building shared understanding, and helping teams prioritize realistic goals aligned with their capacity and organizational context. Several participants noted that this structured approach made the findings feel actionable and provided a clearer path forward for advancing their EDI work.

"I learned a lot about planning strategies and about the importance of implementing said strategies effectively."

— Public library, Frontline staff

"Having Ozy as a consultant to keep us on track and get us aligned was incredibly valuable."

The Consulting Relationship

Several participants named the consultant by name as the most valuable part of the pilot. Participants repeatedly highlighted the consultant's ability to keep teams focused & aligned around shared priorities, facilitate productive conversations, provide guidance, and maintain momentum throughout the planning process. Participants described the consultant as supportive, knowledgeable, patient, and effective, keeping discussions focused.

"Ozy was the perfect leader / guide / implementer. She is superbly smart, patient, very even-keeled which to me, took away all the stress I was putting on myself. She allowed us to do the work but gave suggestions when she knew we needed help. I'm grateful to her for making this a good experience and for providing comfort during the process. I'm looking forward to putting our work into action and seeing the results.."

— Academic library, Supervisor/manager

"I think Ozy's guidance helped to reframe how we were working toward our EDI goals and values."

— Academic library, Leadership/administration

Cross-departmental Collaboration

Several respondents emphasized the value of bringing together staff from multiple departments and organizational levels, resulting in stronger internal relationships and broader organizational ownership. Participants also appreciated the opportunity to build relationships with colleagues outside their usual workgroups and hear directly from staff across the organizational hierarchy.

"We prioritized including staff from all corners of the library, and as a member of administration it was really great to see growth amongst some of our more junior staff!"

— Public library, Leadership/administration

Learning From Peer

Participants appreciated the opportunity to engage with colleagues from other libraries during the cross-library session. Hearing how peers were approaching similar challenges, sharing ideas, and reflecting on different organizational contexts broadened participants' perspectives and reinforced that many libraries face common opportunities and barriers in advancing EDI work. Several respondents indicated they would have welcomed additional opportunities for this type of peer exchange, suggesting that future cohorts could benefit from incorporating more cross-library learning and discussion throughout the pilot process.

"It was nice to have the discussion with the other libraries to compare what was going on in other libraries."

— Public library, Librarian

Affirmation of Existing Strengths

In addition to identifying opportunities for growth, participants emphasized the value of recognizing and affirming the meaningful EDI work already taking place within their libraries. Rather than approaching the process from a deficit perspective, many respondents appreciated that the assessment highlighted existing successes, resources, and organizational capacities that could serve as a foundation for future efforts. This strengths-based approach reinforced that advancing EDI is an ongoing process of building upon existing commitments, allowing libraries to celebrate progress while identifying strategic opportunities for continued growth.

"The most valuable outcome was seeing all the strong work we are already doing and realizing we could build on our good work."

— Academic library, Supervisor/manager

Challenges & Barriers

Although feedback was overwhelmingly positive, participants identified several implementation challenges. Scheduling was the most frequently cited logistical barrier — coordinating a cross-hierarchy group's time for sessions and between-session work. Several structural themes recurred:

- **Scheduling:** The most frequently cited barrier involved scheduling meetings and finding sufficient staff time to complete work between sessions.
- **Authority gaps:** Several respondents noted that meaningful change in certain areas (such as facilities or county- and township-level policies) required director, board, or municipal involvement beyond the pilot's participant group. While teams were often able to identify areas for improvement, implementing solutions sometimes depended on decision-making authority, resources, or broader organizational factors outside the library's immediate control.
- **Staffing capacity and turnover:** A few libraries experienced staff departures or new hires during the process, disrupting continuity and requiring goals to be adjusted. Several libraries also noted that turnover, vacancies, and limited staffing capacity could affect their ability to implement future initiatives.
- **A new way of thinking:** For several first-time participants, the assessment and planning framework represented a new approach. Some initially found the process unfamiliar and challenging, but most indicated that it was or became more intuitive with practice and facilitation support.

Suggested Improvements to the Tool

While evaluation findings were highly positive, responses suggest several opportunities for strengthening future iterations of the assessment. Feedback on the instrument itself centered on flexibility and length rather than content:

- Allow a way to mark domains as not applicable or outside institutional control (e.g., facilities, county/board-level policy) rather than scoring them as gaps.
- Reduce the number of questions per section, or divide the tool by participant role, since some administrative and structural questions are inaccessible to frontline staff.
- Consider customizing the tool by library type or governance structure (e.g., county system vs. independent municipal library).

Advice From Participants to Future Cohorts

In addition to reflecting on their own experiences, participants shared advice for future libraries considering or participating in the pilot, offering practical recommendations based on their experiences:

Approach the work with openness and humility:

Participants encouraged future teams to enter the process with an open mind, a willingness to be vulnerable, and the understanding that equity work is an ongoing learning process. Several emphasized giving themselves and others grace while recognizing that continuous reflection and community engagement are essential to creating a welcoming library environment.

Set realistic, meaningful goals:

Several respondents recommended developing a mix of short-term, long-term, and aspirational goals. Participants also stressed that meaningful organizational change takes time and that even small improvements represent important progress when sustained over time.

Build a diverse, collaborative EDI work team:

Participants emphasized the importance of involving staff from across departments and organizational levels. They noted that the most productive conversations occurred when all staff felt comfortable sharing their perspectives, listened respectfully to one another, and avoided taking feedback personally.

Stay engaged between sessions:

Many participants recommended treating the work between facilitated sessions as an essential part of the process. Completing assigned preparation, designating someone to keep the team accountable, and holding additional internal meetings helped teams maintain momentum, deepen discussions, and arrive better prepared for each facilitated session.

Do it!:

Participants overwhelmingly encouraged future libraries to take part in the process, describing it as a valuable opportunity for reflection, learning, and organizational growth. Many emphasized that the assessment and facilitated discussions generate insights that extend beyond goal setting and help identify broader opportunities for improvement.

"Participate in this valuable assessment! Take advantage of the conversations and reflections that come from the assessment tool and meetings and use this valuable information to not only create goals but to consider improvements not covered."

— Academic library, Supervisor/manager

"This program is a great resource to use whether you're beginning a new EDI initiative or doing a refresh on an old program!"

— Public library, Frontline staff

"Do it, it is nothing but beneficial."

— Public library, Leadership/administration

Recommendations for Future Implementation

Overall, the pilot demonstrated that combining organizational assessment with facilitated strategic planning is both feasible and valuable. The recommendations below draw on participant survey data as well as operational lessons learned by the pilot consultant during implementation. Together, they are intended to strengthen future cohorts and support statewide implementation of the New Jersey EDI Institutional Assessment.

1. Increase Time Allocated for Consulting and Strategic Planning

The pilot demonstrated that meaningful organizational change requires more time than originally anticipated. Libraries consistently identified the consulting process, strategic planning sessions, and prioritization activities as the most valuable aspects of the pilot, reinforcing the importance of preserving and expanding these components. Future implementations should allocate additional consulting time, with a minimum of either three two-hour strategy sessions or four 90-minute strategy sessions. This additional time would allow libraries to move through planning at a more sustainable pace while providing adequate space for discussion, decision-making, and refinement of implementation goals.

Future budgets should also more accurately reflect the full scope of consultant effort required to support each participating library. In addition to facilitated meetings, substantial time was devoted to reviewing assessment results, preparing customized materials, refining workplans, documenting progress, and coordinating with library teams. As a result, the consulting budget required adjustment during the pilot to accommodate the actual level of effort.

Based on the pilot experience, approximately eight libraries per consultant represents a practical upper limit for maintaining a high-quality, individualized consulting experience. Expanding beyond this number would likely require either additional consulting capacity or a modified service model to ensure each library continues to receive the level of support that participants identified as one of the pilot's greatest strengths.

2. Treat the Process as Ongoing Implementation Support Rather Than a Time-Limited Pilot

While the cohort model offered valuable opportunities for shared learning, libraries progressed through the strategic planning process at different rates and required varying levels of facilitation. Some teams benefited from highly structured guidance, while others primarily needed consultation and feedback on work they completed independently.

Future implementation would benefit from framing participation as an ongoing consulting engagement rather than a fixed sequence of identical sessions for every library. This approach would provide flexibility while ensuring that each library receives support appropriate to its organizational context, readiness, and capacity. Similarly, future cohorts should build additional time between sessions for libraries to complete agreed-upon action items. Implementation activities should become an integrated part of the consulting process, with each milestone supported through scheduled check-ins and follow-up conversations.

3. Increase Between-Session Engagement

Future implementations should incorporate more intentional engagement between facilitated sessions to maintain momentum, support accountability, and reduce delays in the strategic planning process. During the pilot, periods between meetings often became bottlenecks as libraries balanced competing priorities, completed agreed-upon action items, and coordinated scheduling.

To address this, future cohorts should allocate dedicated consultant time for between-session activities, including scheduling, progress check-ins, email communication, and follow-up support. These touchpoints can help maintain forward progress, identify barriers early, and provide timely guidance as questions arise.

In addition, implementation activities completed between sessions should be treated as integral components of the consulting process rather than informal "homework." Establishing clear expectations,

timelines, and accountability for interim deliverables will help libraries arrive at each session prepared to build on prior work rather than revisit unfinished tasks.

4. Strengthen Implementation Support Following Strategic Planning

The pilot concluded with completed EDI workplans; however, implementation presents a new set of challenges that many libraries will encounter over time. Future iterations should include structured implementation support, such as:

- follow-up coaching sessions after workplans are launched,
- opportunities for troubleshooting implementation challenges,
- ongoing access to consultant expertise,
- implementation check-ins at regular intervals.

Although the project includes planned three- and six-month follow-up surveys to assess progress, these surveys currently measure implementation rather than actively supporting it. Pairing evaluation with continued consultation would allow libraries to receive guidance as new questions and barriers emerge.

5. Expand Opportunities for Evaluation and Continuous Feedback

Given the pilot nature of the project, evaluation activities were intentionally limited to remain within budget. Future implementations should incorporate more embedded evaluation throughout the process. Potential evaluation activities include:

- an individual pre-pilot survey measuring participant knowledge, confidence, and organizational readiness,
- a post-pilot survey for comparison,
- and brief pulse checks after each major touchpoint (the assessment, the cross-library workshop, the debrief, and each strategy session) to catch friction in real time instead of only at the end.

Collecting feedback throughout the process would strengthen future refinement while providing a more complete understanding of how participants experience each stage of the pilot.

6. Customize Application of the Assessment Tool

Participants overwhelmingly found the assessment meaningful and relevant. Several refinements, however, would improve usability. Most notably, respondents recommended greater flexibility for questions addressing domains outside a library's direct authority, such as facilities or governing board policies. Future implementations should allow consultants to customize the assessment during onboarding by identifying questions or domains that are not applicable to a particular institution or adjusting the scoring methodology to better account for areas outside participants' control. This individualized approach would preserve the assessment's comprehensiveness while improving relevance for different library types.

7. Expand Communication and Change Management Support

Several libraries would benefit from additional guidance on communicating their participation in the assessment and introducing resulting workplans to staff, leadership, boards, and other stakeholders. Future cohorts should include communication planning resources that help libraries communicate the purpose of participation, share assessment findings appropriately, introduce strategic priorities, and build organizational buy-in for implementation.

Libraries also noted that goals requiring board or executive approval can be difficult to advance without leadership engagement. Future implementations should consider incorporating directors or governing boards earlier in the process when appropriate.

8. Strengthen Peer Learning Opportunities

Participants appreciated the opportunity to engage with colleagues from other libraries during the cross-library workshop and expressed interest in additional opportunities for peer learning.

Instead of requiring every library to move through the consulting process simultaneously, future implementations could offer periodic community-of-practice gatherings or quarterly drop-in sessions where participating libraries share implementation successes, challenges, and emerging practices. This flexible approach would preserve the benefits of peer learning while accommodating varying organizational timelines.

Conclusion: Preserving the Integrated Model

The evaluation strongly suggests that the pilot's greatest strength is not the assessment tool alone, but the consulting model built around it. Participants consistently named the consulting relationship, facilitated reflection, prioritization activities, and strategic planning as the most valuable parts of the process. Together, these elements turn the assessment from a diagnostic instrument into a practical engine for organizational change.

Consulting support and prioritization were the two highest-rated elements of the entire pilot, confirming that pairing assessment with facilitated implementation support is what makes the difference. Libraries left not just knowing their strengths and gaps, but with concrete priorities, SMARTIE goals, and workplans tailored to their own context.

While the EDI institutional assessment instrument itself was a useful tool, the piloted integrated model served as a capacity-building process that strengthened organizational understanding, fostered cross-departmental dialogue, and equipped participating libraries with practical strategies for advancing equity, diversity, and inclusion. Future implementation should preserve this model while expanding sustained implementation support, peer learning, and continuous evaluation. Doing so will position libraries to both assess their progress and build the organizational capacity necessary to sustain meaningful, long-term change.