the WASH AND LEARN COMMUNITY TOOLKIT

How to transform laundromats into learning spaces

WHAT IS THE WASH AND LEARN INITIATIVE?

CH. 1 LAUNDROMATS INTO LEARNING SPACES

WHY THE LAUNDROMAT?

Laundromats are ideal spaces to engage with busy families. Clients are often families in need of digital and educational resources, as the average user earns less than $28,000 a year. Clients return weekly to their local laundromats and wait for an average of 90 minutes for their clothes to wash and dry, spending on average two and a half hours a week at the laundromat. Many laundromats are open 24/7, providing an opportunity to reach families even after the library has closed.

By meeting families at the laundromat every week, WALI makes library services accessible for low-income community members with challenging work and childcare schedules, for those unfamiliar with their local library, or for families unable to travel to the library.

Libraries Without Borders (LWB US) works in partnership with public libraries and community-based organizations to design, implement, and evaluate the Wash & Learn Initiative (WALI) in eight states and in the District of Columbia.

LITERACY AND LAUNDROMATS

In 2018, Dr. Susan Neuman, Professor of Childhood and Literacy Education at New York University, conducted a two-phase pilot experimental study of New York laundromats equipped with the “Laundry & Literacy Kit.”

Created by the collaboration of Too Small to Fail, the LaundryCares Foundation, and Libraries Without Borders, the robust “Laundry & Literacy Kit” consists of high-quality materials designed to create playful, literacy-rich spaces for young children and families in the laundromat environment.

Findings from this evaluation illustrated the laundromat's potential to serve as an incubator of early literacy development.

- Children were observed engaging in 30 times more literacy activities in laundromats that include the literacy areas compared to laundromats that did not have these areas.
- The librarian’s presence in the laundromat prompted children to engage in significantly more sustained literacy-related activities, compared to the control sites.
- Parents were more much likely to observe their children’s literacy activities than they were to engage in them. WALI provided the parents with more opportunities to observe ideal models of interactive reading and language-rich activities; these parents were delighted with their children’s accomplishments.
- Customers praised the literacy spaces and felt greater loyalty to their local laundromats. Customers even suggested such spaces demonstrated the laundromat owners’ concern and care for their community.

INTRODUCTION

"Every day is a new opportunity...every day you may have to switch up your engagement and tactics a bit."

- Phasoua Vang
Librarian from St. Paul Wash and Learn program

What happens when you transform a laundromat into a learning space? A pop-up library? A community hub? The truth is that each Wash and Learn Initiative (WALI) laundromat is different — so no two sites are exactly alike. In fact, the very success of this WALI model rests upon its ability to provide relevant and responsive programming to a wide array of audiences that meets the unique needs of diverse communities.

Despite the inherent challenges of this hyper-local approach, our WALI programs share a number of key similarities that are integral when setting up expectations for your own WALI laundromat. Read on to make sure you know and understand how to make sure you set clear expectations.

There are a number of important similarities that all WALI programs share. So before you get started, here are key considerations to make sure you know what to expect when launching your WALI program. Now it is time to choose your own adventure.

Being a proactive self-starter and thinking outside the box are important skills to have when you want to work in a laundromat. In this setting, you'll engage with patrons of all backgrounds — from new immigrants and refugees to individuals with limited English proficiency or literacy skills — each and every day. By being creative, kind, and welcoming you can find unexpected ways to connect with patrons, whether that's through open body language or friendly greetings when folks enter the laundromat.

Lo Smith, Coordinator of Digital Equity and Emerging Technology at the Enoch Pratt Free Library, says people often come in with a lot of assumptions about laundromats. When they first worked in laundromat spaces in Baltimore, based on research, they expected to see mothers and children. Instead, they met men of color between the ages 33 and 60, who instead of engaging in programming, were more interested in watching sports. Lo continues, "Laundromats seem very logical...but we found that people have been doing this their whole lives; they already know exactly what they want to do for 90 minutes (i.e., watch sports and bond with other men). So what did we do? Join them! Build rapport."

GETTING TO KNOW YOUR WALI PARTNERS & COMMUNITY

To run a successful Wash and Learn program you'll need the support of partners and community members. Below we've outlined a few tried and true strategies designed to help you get to know key project stakeholders.

- **Don't be shy!** Use every chance you get to introduce yourself to program partners and community members -- from other librarians to local nonprofits to laundromat owners and staff.

- **Know the 'why' for every partner.** Though every WALI program is unique, they all have one thing in common: people! Make a genuine effort to get to know the other folks who are part of your Wash and Learn program. What brings you all together? What motivates you to stay involved? Why do you care about this project?

GETTING TO KNOW YOUR WALI PARTNERS & COMMUNITY *CONTINUED*

- **Define place.** Once you've found your WALI laundromat and partners, it's time to get to know the community around you. As you familiarize yourself with the neighborhood, ask yourself the following questions:
    - Who lives in this community?
    - What is the history of this place?
    - Who are the existing trusted voices?
    - How will this program empower existing leaders?
    - What difference will this program make in supporting the community's existing goals?
- **Find your people.** Once you've had a chance to get to know key partners and community members as well as the community-at-large, it's time to identify your go-to people for different aspects of programming. At a minimum, you should establish 1 point of contact for each of the following:
    - Your WALI laundromat (ideally, the laundromat owner, manager, and/or staff)
    - Your WALI librarian(s) / outreach librarian(s)
    - Local leaders / trusted voices in the community

ESTABLISHING ROLES & EXPECTATIONS

Establishing the roles and expectations of all the key players is an essential part of smooth WALI operations. Key players, similar to point of contact, include staff and partners who provide programming, laundromat staff members, and community partners. Expectations should be outlined during staff training and onboarding. The Training and Onboarding chapter includes a guideline of how to create a training tool, as well as how to prepare and execute a successful training session. In addition, it features a retrospective survey designed to solicit direct feedback from facilitators who led a programming session.

CLARIFYING RESPONSIBILITIES

There should be a clear understanding of the frequency of the programs, the scheduling of the programs, and the level of involvement required from specific members of the WALI laundromat.

Be sure to go over the role of the laundromat owner, laundromat staff, programming partners, and local librarians so that everyone is on the same page.

It is often the responsibility of the project coordinator or the librarian in a leadership position to create a calendar of programming events. A sample programming schedule (next page) shows the program hours and types of programs offered at the Hipp Laundromat WALI site in Baltimore.

EXPECTATIONS FOR PROGRAMMING

While each WALI site is unique, you can adapt and implement existing programming according to the needs of your community. After conducting a Community Needs Assessment, adjust the programs hosted according to patrons' interests.

For programming ideas and an overview of her experiences as a programs facilitator, take a look at the interview with Phasoua, a WALI partner located in Saint Paul, Minnesota:

What questions did you have about the Wash and Learn program?
Early on, I had questions about how often we would have to do programming at laundromat sites. I also had questions about which library branches and library staff members could do programming at sites.

What questions might community members have about the program?
Since we've been visiting laundromats with the Bookmobile, questions are usually around when we will be there, what "regular" library services might be available such as returning materials or checking out.

What aspects of your WALI program do you think have the potential to expand?
I was really looking forward to expanding our programming at laundromats by bringing more laptops and technology into laundromat spaces and hosting job searching and resume writing workshops. I would have liked to incorporate some STEM programming and continue to expand on the literacy and storytimes that were already happening in the space. I would have liked to celebrate the cultures and people who use the space and see how we could do more arts programming.

What types of programming have you created or organized?
I've only started programming with WALI since March when the pandemic started in the US and suspended many of the things we wanted to do. We've established laundromat partners as Bookmobile stops and this has been going super well. Outside of WALI, I've done many different types of programming. I've helped to establish and host a block party to celebrate a library branch's 100th year. I've organized programming to celebrate Asian American Heritage Month that included poetry and literary readings, martial arts demonstration, embroidery with elders in the community and more. I've started programming specific to teens and giving them a space to be themselves and hang out. I've coordinated programming between the library and community partners to bring in local businesses and nonprofits to share resources and information.

TROUBLESHOOTING: WHAT SHOULD YOU DO IF ATTENDANCE IS LOW

As you implement programming at your own WALI site, it's normal for attendance to be low at first. Getting patrons at the laundromat to support and participate in programming is something that will take time, consistency, and patience. There are a few approaches you can try to boost your attendance: properly advertise the WALI space and the programming it hosts, communicate with the public, and build relationships with community leaders. You can also try starting off with children's programming to engage the parent population; children are naturally curious and will flock to an area that is catered to them, especially inside the laundromat.

HEALTH & SAFETY CONSIDERATIONS

It's important to take basic safety measures to prevent the spread of COVID-19. The CDC recommends the following precautions to protect yourself and those in your community:

- Keep 6 feet of distance between yourself and others
- Wear a mask that covers your nose and mouth, especially if you are over the age of 2 and you are not fully vaccinated
- Wash your hands frequently with soap and water especially in public places. If unavailable, use a hand sanitizer with at least 60% alcohol content
- Monitor your personal health for COVID-19 symptoms: fever, cough, and shortness of breath
- Safety measures for children and teens:
    - Make sure children are washing their hands regularly using soap and water for at least 20 seconds
    - Monitor children daily for COVID-19 symptoms, including fever, cough, and a sore throat
    - Keep your child at home if they get sick

Cleaning and Disinfection

- Cleaning is an important daily activity for maintaining your WALI site; both program facilitators and laundromat staff will need to work together to maintain cleanliness and safety at the site.
- Clean (using soap and water) and disinfect (using disinfectant products, bleach or alcohol solutions) your space often. This includes tables, desks, keyboards, tablets, phones, and other frequently touched surfaces
    - For the daily maintenance of technology, you may need to first clean off physical debris before using an alcohol-based spray or wipe to disinfect
    - View the Technology Maintenance page for more recommendations on how to maintain the cleanliness and longevity of your devices.
- If available, use supplies from your site's WALI Clean Kit; if not, facilitators are otherwise responsible for bringing their own cleaning supplies such as Clorox wipes and paper towels

Alternative Arrangements

We're fortunate enough to be able to do most of our Bookmobile programming outside. We do offer hand sanitizer and masks for patrons. When engaging with patrons inside the laundromat and outside, most are not wearing masks or may not have access to masks.

Keep in mind you'll need to be flexible about the services you provide during COVID-19. Be prepared to make changes such as rearranging furniture, reducing capacity, and reducing technology available for use. The WALI Reopening Plan includes a four-phase reopening plan in accordance with CDC guidelines to ensure a safe and successful reopening of any WALI site amid the pandemic.

SETTING UP & MAINTAINING YOUR WALI LAUNDROMAT

Internet Connectivity

Internet access is one of the valuable assets that WALI laundromats provide. The case will vary by each WALI laundromat. Generally, the steps necessary to carry out Wi-Fi procurement include:

- Discuss the current Wi-Fi connection with laundromat owners
- Identify the Internet Service Provider ("ISP")
- Discuss a memorandum of understanding ("MoU") with laundromat owners to detail management and troubleshooting of internet
- Prepare the WALI laundromat for installation
- Create a data monitoring plan for users and consider data privacy restrictions

General Site Maintenance

With time and use, the space will wear down and eventually will require repairs. Prior to launching WALI at the laundromat, talk to the owners about their needs, as well as a budget and list of financial responsibilities in the event that major damage does occur. Make sure to include these items in the MoU. View the Placemaking chapter for a better understanding of preparing for the WALI site and wite security and site maintenance looks like.

WHAT IS THE WASH AND LEARN INITIATIVE?

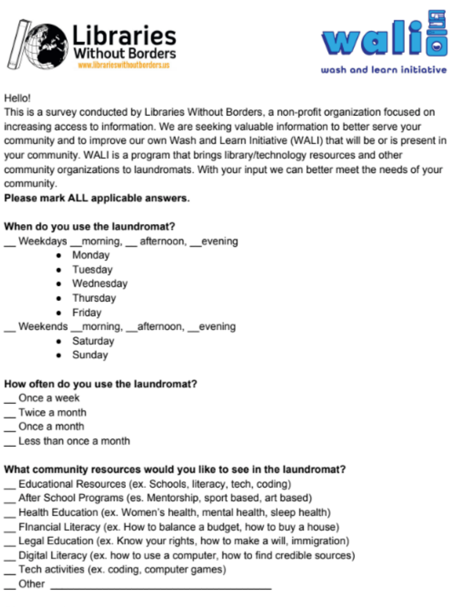
CH. 2 UNDERSTANDING THE NEEDS OF YOUR COMMUNITY

WHAT IS A COMMUNITY NEEDS ASSESSMENT?

A community needs assessment is the process of connecting with community members/end users to understand their wants and needs, the current gaps in programs/services, and allows WALI facilitators, like you, to gather information about the unique communities inside of the laundromat.

Why is this important?

A community-needs assessment can help you gather data from a variety of sources such as online or in-person surveys, census records, informal feedback, laundromat business data, focus groups, workshops, etc.



Libraries Without Borders
www.librarieswithoutborders.us
wali
wash and learn initiative

Hello!
This is a survey conducted by Libraries Without Borders, a non-profit organization focused on increasing access to information. We are seeking valuable information to better serve your community and to improve our own Wash and Learn Initiative (WALI) that will be or is present in your community. WALI is a program that brings library/technology resources and other community organizations to laundromats. With your input we can better meet the needs of your community.
Please mark ALL applicable answers.

When do you use the laundromat?
__ Weekdays __morning, __ afternoon, __evening
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday

__ Weekends __morning, __afternoon, __evening
- Saturday
- Sunday

How often do you use the laundromat?
__ Once a week
__ Twice a month
__ Once a month
__ Less than once a month

What community resources would you like to see in the laundromat?
__ Educational Resources (ex. Schools, literacy, tech, coding)
__ After School Programs (es. Mentorship, sport based, art based)
__ Health Education (ex. Women's health, mental health, sleep health)
__ FInancial Literacy (ex. How to balance a budget, how to buy a house)
__ Legal Education (ex. Know your rights, how to make a will, immigration)
__ Digital Literacy (ex. how to use a computer, how to find credible sources)
__ Tech activities (ex. coding, computer games)
__ Other ____________________

Please continue survey on back.

Basic Steps to Launching a Community Assessment

Before launch

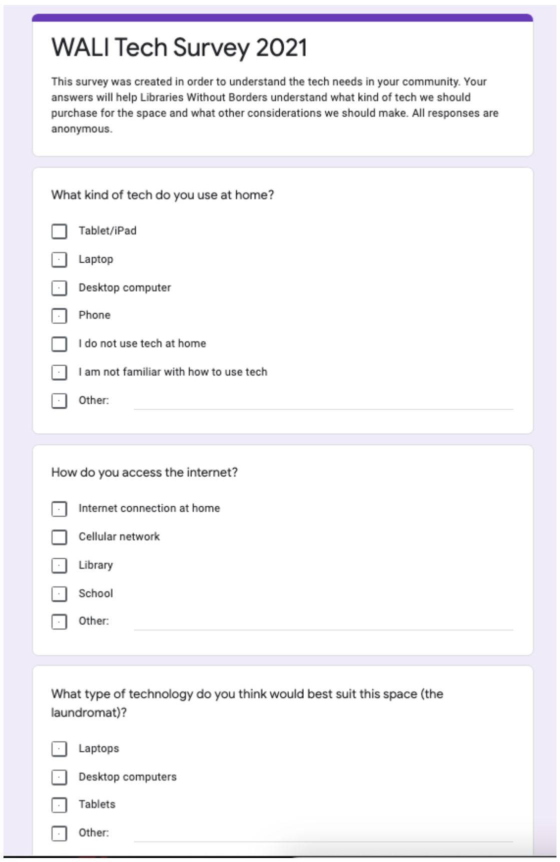
- Who is the community you're serving?
- What currently exists in the community?
- What services, programs, and outreach efforts are missing?

During Implementation

- Who is the community you're serving?
- What currently exists in the community?
- What services, programs, and outreach efforts are missing?

Post-Implementation

- Who is the community you're serving?
- What currently exists in the community?
- What services, programs, and outreach efforts are missing?



WALI Tech Survey 2021

This survey was created in order to understand the tech needs in your community. Your answers will help Libraries Without Borders understand what kind of tech we should purchase for the space and what other considerations we should make. All responses are anonymous.

What kind of tech do you use at home?
- [ ] Tablet/iPad
- [ ] Laptop
- [ ] Desktop computer
- [ ] Phone
- [ ] I do not use tech at home
- [ ] I am not familiar with how to use tech
- [ ] Other:

How do you access the internet?
- [ ] Internet connection at home
- [ ] Cellular network
- [ ] Library
- [ ] School
- [ ] Other:

What type of technology do you think would best suit this space (the laundromat)?
- [ ] Laptops
- [ ] Desktop computers
- [ ] Tablets
- [ ] Other:

WAYS TO CONDUCT A COMMUNITY NEEDS ASSESSMENT

1 In-person

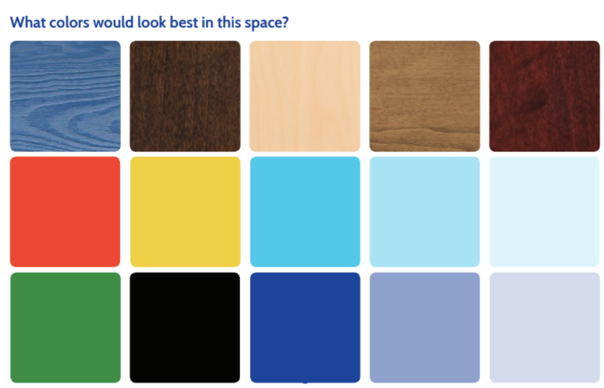
One-on-One Interviews:
Go to the laundromat site on different days of the week at different times to gather a wide variety of responses. The assessment should take no longer than 30 minutes

2 Workshops

Confirm with the laundromat manager the date and time of the workshop.
Workshops take a lot more planning. It's necessary to reach out to community members, find a time that works best for all those involved, create and send preparation materials that introduces the purpose of the workshop etc.

- You may need 3 hours for each workshop
- Print day-of materials in advance
- Make the workshop an interactive activity
- Utilize the WALI Workshop Run of Show Worksheet, which outlines the necessary tools to successfully run a workshop
- Follow the WALI Workshop Guide which provides a flexible framework to use in the development of WALI installations. This includes setup options, stakeholder identification, constraint analysis, and workshop overview

Identify resources and materials that would best suit your WALI site using Design Workshop (WALI Workshop Materials Wall Display) included in Appendix 2.1. Examples are shown below.



3 Virtual

WALI technology
- Set up a virtual survey that can be accessed on your WALI technology so users can give input easily

Listserv
- Gather emails from WALI site users, create a listserv, and set out an online survey to the listserv

4 Written (Passive)

WALI Site Surveys

Leave printed copies of a survey at the WALI site with pens and pencils. Invest in a lockbox that users can put their completed surveys in.

Important Considerations

Our Baltimore Project Coordinator, Azure Grimes, talking to a WALI user about his experience at the laundromat and the WALI site

Drafting the Assessment: Things to Consider

1. What form matches your needs/availability/community?
2. What goals do you have for the program?
3. Gather the most important information first: Who is the population, what do they want in a WALI program, how would they design the space?

Increasing Survey Participation

1. Don't ask leading questions
2. Keep surveys relevant
3. Gather feedback in a variety of ways
4. For example: You can talk to WALI patrons one-on-one, leave print surveys out in the open, set up a virtual survey link on the WALI technology
5. Provide an incentive for participation
6. $10 gift card, $15 laundry card

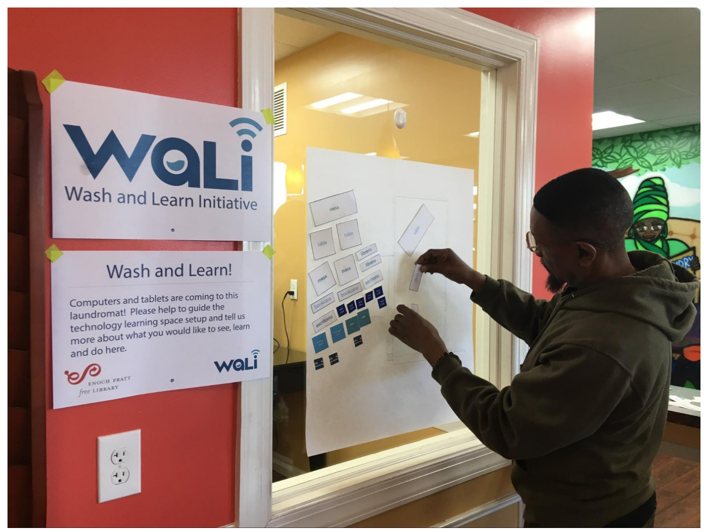
Getting it Right

Community Investment

WALI requires the passion and commitment from all stakeholders like laundromat managers, librarians, nonprofit partners, and especially our laundromat patrons! Getting the community involved in the process early on creates a shared ownership between the community and the WALI facilitators.

Human-Centered Design

When it comes to designing the WALI space, it's very important to get feedback from the folks who will be utilizing it. Refer to the Placemaking chapter for an outline how to design a WALI space that meets the needs of both children and adults.



One of LWB's WALI sites in Baltimore, Maryland. WALI users were asked to give input about what they wish to see, learn, and do at the WALI site. Users gave their input on sticky notes and put it on the communal board. (top)
Baltimore Design Workshop (bottom.)

WHAT IS THE WASH AND LEARN INITIATIVE?

CH. 3 CREATING PROGRAMS FOR YOUR COMMUNITY

INTRODUCTION

The Wash and Learn Initiative provides a space for local communities to utilize resources such as programs that are provided. To best serve the community, there are steps that need to be taken such as

1. **Conduct a Needs Assessment**
2. **Getting People Involved**
3. **Adapting the Programs**
4. **Understanding the difference between Active vs. Passive Programming.**

Examples of previous programs done at WALI sites are provided.

As each WALI is hyper-local and serves the people within the community that visits laundromats, it is important to provide programs that best serve the needs of those patrons so that members of the community feel a direct effect and encourage more participation. This can be done by considering what the community wants to see inside the laundromat. Who are the programs serving? Who is able to host the programs? What are the limits and opportunities possible in the laundromat space? Some ways to gauge your participants' needs are:

- Run an online questionnaire/survey on your participants.
- Ask User Questions on-site
- Provide different options for users and see what program possibilities they are most interested in and ask what they prefer
- Solicit feedback during or after programs take place

One of the biggest challenges is getting people involved in WALI activities. Programming within the laundromat is typically viewed as a new approach to accessing resources and the experience can be completely new to customers especially considering the laundromat space. It will take time and consistency to gain customer participation because when programming is new, people can be hesitant. Previous feedback indicates that people do not know who is able to use the site and the amenities provided, so establishing a sense of belonging for laundromat patrons is necessary. Read the following tips from the LWB Project Coordinators:

- Be consistent and patient with your WALI users
- Set expectations with your partners and make sure partners know that involvement takes time
- Provide adequate signage that explains the space and its purpose for when WALI facilitators are not present

After gauging the community needs and building a consistent group of returning members, it is important to adapt programming to ensure that users are enjoying and learning from the WALI site. This means ensuring that the physical space and materials for the lessons is prepared for the program to be hosted. The Placemaking Chapter includes a more detailed outline on preparing the WALI site by designing workshops for facilitators, obtaining the most necessary supplies and maintaining the site. Please Refer to this chapter for more details on how to foster a learning environment that can meet the needs of both children and adults.

Below are 2 past examples of program changes led by LWB staff that saw positive results:

- During the early days of Baltimore WALI, program attendance was consistently low. WALI facilitators realized that the time the program started and ended didn't align with the customers' schedules. WALI facilitators were able to work with the library to redo our program schedules so that they would be at the laundromat during their busiest times instead. After that shift, there was an increase in attendance.

- When WALI facilitators first started implementing librarian programs, no one on the staff spoke Spanish. When librarians would come to Hipp Laundromat (a laundromat that served a majority Spanish-speaking population), there wasn't a way for the librarians to connect with the patrons. WALI facilitators worked with the library to hire more program assistants that were bilingual. It took some time but facilitators were able to hire 3 program assistants that spoke Spanish.

This program adaptation did not work and did not enhance the facilitation of the WALI site. Don't be discouraged by programming that doesn't work, as these instances are great opportunities to learn how to plan better programs.

WALI facilitators realized that Hipp Laundromat customers needed help with financial literacy skills. At the time, LWB was working with a partner that provided budgeting classes and there wasn't a lot of initial participation. LWB decided to work with an additional partner to bring over a financial literacy bus to park in the laundromat parking lot to meet with clients one-on-one about things like their credit scores, tax prep, budgeting tools. When the bus came and the program started, no one really showed up. Later, LWB discovered that although financial literacy was an interest to a few patrons, they were actually looking for employment. So we had to switch gears on what programs LWB invited to that specific laundromat.

ACTIVITIES AND SERVICES

There are many ways your program can meet the needs of community members. By offering a variety of activities and bringing critical services directly to laundromat patrons at specific times each week, you will curate experiences that appeal to people of all ages. Unlike place-based resources that are always available and can be used at the discretion of laundromat patrons, activities and services are the "lifeblood" of a WALI program. Based on the findings of your community needs assessment and the capacity of your partners, identify 2-3 activities and services that your WALI program can offer on a regular basis.

To get started we suggest you search for activities and services that are easy to transfer from the library to the laundromat. We recommend things like: resumé building workshops and other career services, toddler storytime, pre-teen book clubs, and financial literacy activities. Note: partners might be intimidated by the idea of shifting from one environment to another, but reassure them that the fundamental activity or service will remain the same. Also let them know that this process will take time, so patience is key. For advice on preparing partners to work inside a laundromat, check out the Training and Onboarding Stakeholders section of the WALI Community Toolkit. This section includes general objectives for a WALI site training, as well as four training and onboarding steps: creating a WALI training tool, preparing for your training session, conducting the training, and post-training survey.

As you develop your WALI program, communication is key. Make sure that you keep partners, participants, and laundromat staff (including owners!) apprised of all programmatic changes. Include them in the decision-making process, as appropriate. For more advice on communicating with partners, take a look at the Communication section of this toolkit. This section provides a helpful guide on questions to consider when creating a communication plan, creating an official plan, sharing your message through the most appropriate channels, and pitching to the press.

Other Community-Based Organizations and Civic Associations to Consider Partnering with:

- **Legal Assistance or Legal Aid**. These organizations can help WALI site users with legal matters such as writing a will, immigration, parking tickets, records, etc.
- **Food Aid Organizations**
- **Literacy Programs**. Look for organizations that focus on after-school programming for children and/or adult literacy.
- **Art Programs**
- **Music Programs**
- **Health Programs**. The Detroit WALI site partnered with Authority Help, an organization that taught WALI users how to read nutrition labels, healthy sleep patterns, and provided mental health resources.
- **Technology** at reduced prices for lower-middle-income families program efforts
- **Digital literacy training programs**. Baltimore WALI site partnered with another non-profit that focused on the intersection between community gardening and computer coding
- **English as a Second Language Programming**. Oakland WALI site partners with an organization that provides lessons to WALI site users for free
- **Financial Literacy Programs.** Be sure to look into the options offered by your local bank. In 1977, Congress passed the Community Reinvestment Act which requires banks to give back to their communities by providing programming and resources.

PLACE-BASED LEARNING

Beyond activities and services, your WALI program should also integrate place-based learning opportunities for laundromat patrons of all ages. Place-based learning can take on many forms. It encompasses everything from:

- Flyers and brochures from local libraries with information about available resources
- Books for children and adults
- Felt board/ storytelling devices for parents and kids to interact with
- Educational posters along walls
- Sticker decals for the floor
- Magnet boards with alphabet
- Chalkboards
- Information about resources outside of the laundromat

CURRENT PROGRAMMING EXAMPLES

Our WALI programs in Baltimore and San Antonio have a wide variety of offerings. Check out these examples of our work on the ground.

Baltimore WALI Programming:
- Tax preparation services
- Community Fair with a variety of local organizations
- Digital Inclusion Week: a variety of technology classes Baltimore's WALI sites
- Amerigroup, a health insurance partner, runs Health Programming at WALI sites
- Enoch Pratt Public Library runs Professional Development programming at WALI sites

San Antonio WALI Programming:
- In partnership with the San Antonio Public Library, we offer storytime, arts and crafts, library card sign-ups, and personalized tech assistance
- In partnership with BiblioTech, an all-digital public library, we offer digital literacy workshops and literacy enrichment activities
- In partnership with MOVE Texas, a political nonprofit organization, we offer voter registration services

WHAT IS THE WASH AND LEARN INITIATIVE?

CH. 4 EVALUATING YOUR PROGRAM

INTRODUCTION

Metrics and data play a critical role in program evaluation. Metrics refers to setting up parameters for data that's used to measure performance, while data refers to the specific numbers or calculations that's gathered for a given metric. Examining the program data helps WALI facilitators understand the progress, success, and effectiveness of the program. It also gives facilitators invaluable information to guide future improvements to the program and share findings with stakeholders and the public. Each WALI program varies by the needs of its local community, the location of the site, and its program partners, and so it's important to design metrics that are appropriate for your site.

HOW TO CREATE AN EVALUATION PLAN

Creating an evaluation plan is an important first step before you begin to design metrics and conduct your evaluation. Your plan should answer questions including what will be evaluated, the purpose for evaluation, who will conduct the evaluation, and how it will be conducted. The answers to these questions help lay out your priorities, identify any constraints, and later determine the methods you choose. Evaluation purposes can include:

- What are the effects of this WALI laundromat on literacy levels in the community?
- Does having a facilitator on-site make a difference?
- What is the impact of having library services on site? How does it increase the capacity of the library or organizations that offer programs?

Evaluation questions are the key questions that will help you understand the impacts, effectiveness, and achievements of your WALI laundromat. Asking the right kinds of questions leads to useful data and results that can be shared with funders and partners. There are generally four different types of evaluation questions: process-oriented, output-oriented, outcomes-oriented, and questions about the lessons learned. The types of evaluation questions and useful questions for WALI programs are listed below.

Process-oriented:

- Is WALI programming carried out as expected?
- Are site resources—hardware, software, connectivity, infrastructure—being provided to users? If not, what obstacles stand in the way?
- How is librarian-supported or community-partnered programming going?
- How are the program facilitators performing their programs?
- Have users participated in programming before? Which programs?
- How do site users and patrons feel about the current programs?
- How many users have participated in programming?
- How are community members engaging with the WALI model?
- Did community members intentionally come to the laundromat to participate in WALI programming? Or were community members passing through the laundromat at the time of programming and decided to attend?
- What were things participants liked or disliked?

Output-oriented:

- How many patrons did WALI staff interact with in a session? A session consists of an allotted programming time that engages WALI patrons in a learning activity with a clear outcome. EX: A reading hour that increases literacy.
- How many patrons attended a session?
- How old is the average participant, or what age ranges are participating?

What days of the week or times of day are users engaging the most or the least?

Outcomes and impact:

- Did WALI patrons experience any changes in their skills or knowledge? Are WALI users more aware of library resources and programs?
- What kinds of outcomes are realized for community members in different age ranges—outcomes for children ages 13 and under, teenagers 13-16, adults 17-61, and older adults 62 and older?
- Did the WALI program meet the community needs that led to this project?
- Are there any other changes that occurred as a result of WALI programming? Are they expected?
- These outcomes can be positive or negative, and extend to the laundromat owners, library and community partners, and the community at large.

Lessons learned:

- Is there anything that could have been done differently to make the program more effective to target its goals?
- What lessons can be learned for the future?

HOW TO CONDUCT AN EVALUATION

Evaluation sources are the materials or people that can help you gather information. The following sources are a good place to start:

- Laundromat owners
- WALI users
- Programming partners
- External evaluators

The methods you will use to gather data will be based on the kinds of questions you want the evaluation to answer, your budget, and your time frame.

Focus group. A focus group is a guided discussion used to explore people's thoughts, feelings, and opinions on a specific topic. They typically involve six to twelve participants who respond to questions prepared by a moderator. This is a unique way of using free discussion to explore ideas and get feedback on a topic. Focus group participants can potentially include WALI staff, programming partners, and regular WALI patrons.

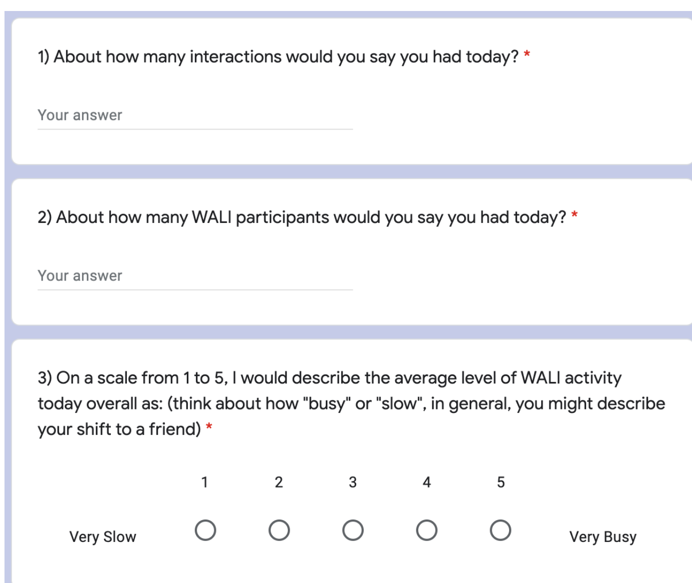
On-site visit. This can include casual notes about the site through direct observation or by engaging in conversation with laundromat staff, patrons. For example, an evaluator can take notes on the types of information users look for, or whether users typically seek out entertainment or educational sources.

Workshop facilitator documentation and reflection reports. Workshop facilitators document the dates and times of workshops, the number of attendees, and the average age of attendees. They also provide commentary on how they felt the session went.

Activity log/observation notes from WALI staff. These can take the form of shift reports from on-site staff or meeting notes from check-ins with library partners.

Evaluation forms. Evaluation forms or surveys that are completed by WALI staff and patrons after the program session can provide quantitative, output-oriented data. See the image below and refer to Appendix 4.1 for a full example of an evaluation form created by LWB US for a WALI site in Minnesota.

Documentation. Forms of documentation can include web server usage reports and iPad use reports in the form of screenshots, which gives some information about total views and how time is spent. The average screen time usage can also be documented.



1) About how many interactions would you say you had today? *

Your answer

2) About how many WALI participants would you say you had today? *

Your answer

3) On a scale from 1 to 5, I would describe the average level of WALI activity today overall as: (think about how "busy" or "slow", in general, you might describe your shift to a friend) *

	1	2	3	4	5	
Very Slow	○	○	○	○	○	Very Busy

HOW TO USE DATA

The data from your evaluation can help identify specific ways to improve or modify the program. For instance, in an initial report performed by a third-party evaluator Inciter, they mentioned issues such as poor signage at WALI sites that led to ineffective outreach. In later iterations, WALI laundromats in Baltimore were able to act on their observations and suggestions to better direct users to resources. The evaluation results can also help you make a sustainability plan for continuing a WALI program past its pilot phase. The full Inciter report can be found at the end of this section.

Lastly, you can communicate your data via evaluation reports to appeal to partners and attract potential funders. This is a crucial step for sharing your program outcomes and achievements with internal and external stakeholders. In doing so it’s helpful to first identify who your audience is and what their priorities are in order to present the most relevant findings to them. You can also utilize tools like Microsoft Excel to visualize your data in a digestible format.

HOW TO WORK IN A LAUNDROMAT

CH. 5 FINDING A LAUNDROMAT

KEY CHARACTERISTICS OF A WALI LAUNDROMAT

A good WALI location considers both the laundromat it's located in, as well as its surrounding community. There are a few signs that indicate a laundromat will make an ideal WALI location. The laundromat first needs to have frequent foot traffic (i.e. the number of people coming through on a regular basis). You can tell by making observations about its size or the number of people it serves. Typically, the laundromat needs to either operate over 25 washers and 25 dryers or serve over 20 families an hour during peak hours (weekday evenings and weekends).

The laundromat also needs to be large enough to host a learning space without getting in the way of patrons doing laundry. Depending on your site, your setup will include a Tech Hub and reading space. Your Tech Hub will be a space for patrons to use computers or tablets and interact with library support staff or local organizations, while the reading space will be a flexible place for children or adults to work through learning modules and read books. Between these two set-ups, the laundromat will need to be large enough to fit tables and desks, chairs and floor space for kids, and bookshelves. It's essential to visit in person to make observations on size, as well as the environment of the laundromat—make note of what kinds of patrons come frequently, with whom, and how they spend their time here. These observations will come in useful later for program design as well.

Tech Hub and children's reading area from WALI sites in Minnesota and Texas.

Other important qualifications include the laundromat's proximity and ease of accessibility. Consider the local library's involvement. In some cases, it does not matter where the library is in regards to the WALI site because the library is not as involved. In other cases, a library or other community organization is using WALI as a vehicle to establish a presence in the community and offer resources. Accessibility can come in a lot of forms, whether this means the laundromat is within walking distance for patrons or offers transportation service. For instance, the Coinless Laundromat in Detroit, Michigan is within walking distance from the Parkman Branch of the Detroit Public Library and near a robust local organization, HOPE Village. This enabled the laundromat to reach a large number of patrons, especially for individuals and families in under-resourced neighborhoods.

The Community

The communities that surround a WALI laundromat are the second piece integral to choosing a location. **One of the chief goals of the WALI program is to make digital tools and services more accessible for families below 200% of the poverty line.** When it comes to choosing WALI laundromats, this means locations where a majority of families in the surrounding neighborhoods are below 200% of the poverty line or have median incomes of less than $35,000 a year.

Another important neighborhood demographic to take note of is education and literacy levels. For school-age children, this can be evaluated through the summative assessment system used in your state. Look at, for instance, the percentage of students in that community that are meeting or exceeding the passing rates for English language arts. In the case of the Laundry City site in Baltimore, in the Allendale, Irvington, and South Hilton neighborhoods, 12.1% of third-grade students, 9.9% of fifth-grade students, and 6.7% of eighth-grade students met or exceeded the passing rate for the PARCC Reading test. Other general demographics including age, nativity status, race, and ethnicity will also play a role in determining the needs of the community.

The ideal WALI site also needs to align with local needs, interests, and capacity—identifying and soliciting the expertise of community stakeholders will be invaluable in this regard. **To identify key stakeholders, make a list of active community organizations within a five-block radius of a potential site, including youth programs, community or block associations, senior programs, Main Street or BID (business improvement district) programs, faith-based organizations, and other non-profit organizations.**

I'VE FOUND THE PERFECT LOCATION, WHAT DO I DO NEXT?

Before Reaching Out

After you've found the perfect location for your WALI site, the next step is initiating communication with the laundromat owner. But before taking this step, it's important to develop plans for negotiating a Memorandum of Understanding (MoU) and setting a sustainability plan. The purpose of drawing up an MoU is to define mutually acceptable expectations as you work together with the laundromat owner and community partners toward a shared purpose of transforming the laundromat into an access point for digital learning and community development. The WALI Community Toolkit provides a universal draft of the MoU, which can be modified for the agreements specific to the laundromat and WALI site; see Appendix 5.1 for a sample MoU made with EZ Wash Laundry. In the MoU, you'll specify respective duties that each party is responsible for, as well as mutual duties all parties are responsible for. For instance, be prepared to discuss who will cover the cost of Wi-Fi installation and use, utilities, and supplies. Insurance coverage is classified as a mutual duty; make sure the laundromat site has its own insurance and that you each have plans to include the other as a third party.

Communicating with the Laundromat Owner(s)

Moving forward, the cooperation and partnership of the laundromat's owner is key to the success of the WALI site. As you reach out to the owner, remember to acknowledge and assuage any questions or concerns they may have. These may include: concerns regarding profit (that maintaining a WALI program may involve more work than returns), security (that keeping technology at the laundromat may prompt break-ins and theft), and loitering (that the program may bring in non-paying customers).

Keep in mind, the laundry owner will be your biggest partner as you initiate your own WALI program. It's beneficial to take their concerns and feedback seriously, keeping a flexible mindset, and accommodating their needs where possible.

For instance, if the owner is worried about bringing WALI programs to competitors in the area, you can include a competitive advantage clause in the MoU that specifies WALI programs will not be brought to other laundromats within a one-mile radius of the partnering laundromat. Be sure to reassure the laundromat owners with preset measures, such as a safety plan to keep technology at a docking station locked from public access. Additionally, if the laundromat owner is concerned regarding instances of loitering, work with the laundromat owner to provide incentives for WALI patrons to utilize the laundromat. Give out coupons to every program attendee or ask patrons to bring a load of laundry every time they come to a programming session. Additionally, offer redirection. Consider why people are loitering in the area. Are they unemployed? Connect individuals to the resources they need. For example, if you know there is a high homeless population in the area, see if you can partner with a targeted organization that helps the homeless. If there is illegal activity going on, alert the local police.

Lastly, in your communications, be sure to remind owners how a WALI program can benefit their business. From bringing in more patrons for increased profit to decreasing clutter by keeping customers entertained, a WALI program can bring in substantial benefits for the laundromat owner—all while improving their community.

CH. 6 MAKING YOUR LAUNDROMAT A WELCOMING SPACE

Introduction

Placemaking is human-centered design work. Human-centered design approaches solutions to problems by utilizing the human perspective in all steps of the problem-solving process. This process allows designers to work hand-in-hand with folks who will be using the tools to gather information, create prototypes, gather feedback, and make improvements. WALI Facilitators are working with a small space, so it's important to think creatively about ways to foster a learning environment that can meet the needs of both children and adults.

Preparing for Placemaking

Budget considerations. Make sure to have a realistic vision of what your WALI site will look like with the funds available to you. Identify the priorities within your budget. For example, will your WALI site benefit more from the use of literacy tools rather than technology?

Space considerations. There is no minimum size required for a WALI Site but an ideal space would be 8 feet by 4 feet. However, it's important to work with what is available. Reach out to the laundromat owners and/or managers to see if they have a preferred space for the WALI program. It helps if you get measurements and take pictures of the space.

Design workshop held at an LWB Baltimore WALI Site

Design Workshops for Placemaking

Gather Information

Before purchasing furniture and materials, it's important to gather community input on how to set up the space to meet the needs of the patrons. See the *Understanding the Needs of Your Community* Chapter, (page 7.) for guidelines for conducting a community needs assessment.

Create a workshop or survey for laundromat patrons to complete so WALI facilitators can have a better understanding of the community's needs. For example, one of our program coordinators conducted in-person surveys on different days of the week at different times of the day to gather a wide array of responses.

Additionally, if you find it useful, set up a workshop and invite laundromat customers to attend and give their input. Workshops take a lot of planning but they are useful because a lot of information can be gathered at once. Ask patrons about:

- The placement of the tables/chairs, including the color of the chairs, the size of the table, etc.
- If they're interested in having technology on-site
- What types of programs they're interested in
- Their thoughts on interior design such as wallpaper, community art projects, a mural by a local artist, etc.

Send the laundromat managers and/or owners a copy of the results and subsequent design plan for their review and confirmation.

The workshop materials we used to design the Baltimore WALI sites can be found at Appendix 6.1.

Placemaking Supplies

Furniture

There are a few factors to consider when purchasing furniture. In the experience of LWB project coordinators, laundromat managers typically prefer not to use chairs with wheels on the bottom. Chairs should also be comfortable and easy to clean. Avoid fabrics that absorb liquid when at all possible. The tables should be long enough to leave space between each station for folks to have some privacy. Purchase bookshelves dependent on the size of the site. If it is within your budget, invest in quality furniture over cheap furniture. Although the furniture will gather a lot of wear and tear, it's better to get furniture that lasts rather than cheap furniture that needs to be constantly replaced. See *Appendix 6.2* for a list of furniture options LWB staff considered for WALI laundromats, including options for tables, chairs, shelves, and space dividers. It is also imperative that the WALI space is safe and accessible for children. Kids and toddlers will tend to run around the laundromat so you will need to take steps to prevent accidents.

To view a catalog of the furniture, technology, and equipment LWB project coordinators have curated, please see *Appendix 6.3*. This catalogue includes child-safe furniture setups and sample options for tablets and computers, such as the Acer Chromebooks pictured below.

Technology

A majority of WALI sites are centered around technology and digital inclusion. A site can have at minimum one laptop or one tablet but also multiples of each. The types of technology primarily used at LWB WALI sites consist of the following:

- Laptops
  - HP Books and Dell Laptops and Chromebooks
  - Laptops with a minimum 14" widescreen size
- Tablets
  - Generation 6 Apple iPads or Android Galaxy Tablets

For tech-specific placemaking guidelines, please see the *How to Outfit Your WALI with Technology Chapter* (page 22).

Accessories

Invest in technology accessories that make the space easier to maintain and more accessible for the user. For example, keyboard covers will make the technology easier to clean and prevent keys from going missing, which has been a recurring problem at WALI sites. Further, wire management can often be overlooked. Wire management products will keep the space clean and organized and prevent the tangling of wires. They will also reduce the chance of an accident. Finally, power strips are important. Usually, laundromats do not have a large number of available outlets in the space where you need them. Power strips offer more freedom so you can set up the space how you want it.

Lisa Alvarenga, LWB's San Antonio Project Coordinator, sets up the tech station at a San Antonio WALI site

Additional Peripherals

These materials are not necessary for a WALI site but are a great investment as they make the site more dynamic and engaging. Invest in cork boards, posters, and brochure holders. Additionally, survey materials are important but often overlooked. These materials can include your own printed survey, pencils, and a lockbox that allows WALI users to submit their thoughts about the site and its programming.

Site Maintenance

It is important to create a safe learning environment and maintain the space in order to have a successful WALI program. Laundromat staff prioritizes the safety and cleanliness of the laundromat and WALI facilitators will need to prioritize the safety and cleanliness of the WALI site. As a WALI facilitator, it is important to collaborate with laundromat staff. Check in with laundromat staff regularly about their experience with the WALI program to make sure that the program site is clean, the technology is safe, and the space is welcoming. For information about technology maintenance and security, please read the WALI Technology section of the WALI Community Toolkit.

Tips for site maintenance from LWB Project Coordinators:

- Create a WALI Clean Kit. These kits include Clorox wipes, tech-safe cleaning wipes, and paper towels
- Make sure to clean underneath the technology mounts
- Add additional books. Keeping the bookshelves stocked with a variety of books for WALI users to access easily is important to the success of the programming.

Examples of supply kits including paper towels, disinfectant wipes, lens wipes for technology, and colored markers.

CH. 7 HOW TO OUTFIT YOUR WALI WITH TECHNOLOGY

The value of technology at a WALI site cannot be overstated. This section will provide a step-by-step guide to preparing for, selecting, installing, and maintaining technology and internet connectivity at your WALI.

1 Determining Ownership of Tech

From the onset, be sure to communicate with key partners to determine tech ownership and maintenance. For guidance on creating MoUs with your partners, see *How to Find a Laundromat* (page 16.)

2 Selecting Devices and Equipment

The specific device type and equipment you will use are ultimately dependent on the needs of your community, program offerings, and budget. Before selecting devices, keep the following in mind:

- If your program goal focuses on promoting digital literacy, it is valuable to include multiple types of technology. Laptops are more productive for anything that requires typing, while tablets are easier for beginners.
    - Laptops are preferable for typing, filling out applications, doing research, using email, and completing other multi-step tasks.
    - Adult and/or laptop stations require a minimum of 2 square feet of space (24 inches wide x 24 inches long).
- If your program works with children, tablets are a good choice. Children are drawn to tablets and can operate the touch-screens at a young age.
    - It is worth noting that certain focus areas or partners (i.e. health literacy) may have specific apps that could make tablets helpful for adult users. Any apps that require users to have accounts or collect user data need to be highly vetted.

For reference, below is a breakdown of different tech stations utilized at existing WALI sites.

Device	Managed With	Cost	Notes
Chromebook Acer 15.6 in	Google Admin Console	$350-$400	Station Cost includes current Chromebook, Anchorpad mount, Google Admin license, Kensington lock + anchor. (amount would increase if we upgrade the Chromebook model used; variance accounts for range in Chromebook price)
Android Tablet	Hexnode	$400-$425	Station Cost includes tablet, mount, screen protector, one year of Hexnode (variance accounts for the choice of mount between 2 Bosstab options)
iPad	Hexnode	$510	Station Cost includes tablet, mount, screen protector, one year of Hexnode

4 Secure the Technology

Securing Laptops
Generally, we have found that laptops and Chromebooks seem to be less of a target for theft than iPads. For laptops, Anchorpad security mounts are one of the most effective laptop mounts used so far. The cost for an Anchorpad security mount runs around $100 each, plus shipping.

Installation Tips
The bottom is a strong adhesive, and once you place it on the table you won't be able to readjust. Also, note that the mount itself ends up a bit further forward than the adhesive. In Baltimore, LWB measured the adhesive 4 or 5 inches away from the front edge of the table in order to ultimately place the laptop about 3 inches back from the edge. In San Antonio and Detroit LWB measured five inches from the table edge to the start of the adhesive square/bottom plate.

It is important to use the security screws (with the 2 holes, not screws with hexagons that fit a normal Allen wrench) for the wing brackets, as the laptop can be easily slid out to the side if one side bracket is removed. Each mount contains two cylinder locks. Once installed, the laptops can be easily removed by using the mount keys to undo the locks. All of the keys are the same, which makes things easier. However, at least one lock in Baltimore has become pretty stripped, so be gentle/use caution!

Further, make sure to mount the laptops as tightly as possible, so that the bottom of the laptop can't easily be bent out. The bumper stickers that come with the mounts can be used to increase friction and hold things in place both with the arm brackets and the front bracket. You may choose to combine with Kensington locks in some cases for added security

Securing Tablets
Tablets are more targeted for theft than laptops, and most mounts are designed for commercial settings where there are other additional security measures in place as well (staff, cameras, etc). WALI facilitators cannot rely on laundromat staff to be watching equipment, so you need the most secure mounts you can find.

Pros and Cons of Security Devices for Tablets

- **Tryten iPad Kiosk**
  - Pros: Fairly simple to install
  - Cons: Only available for iPads. Not compatible with any Android tablets.
- **Bosstab Fusion Stand:** Current top choice for Android tablets
  - Pros: The short steel arm in particular feels very sturdy. Meanwhile, the flex arm allows users to position the screen at any angle. Mounted to the desk with no visible screws. Has the option to add an additional security screw next to the lock.
  - Cons: The short arm standstill ends up being a bit "tall," or feels like it angles the screen upwards to a very tall user. Definitely not quite as kid-friendly as the lowest mount, just in terms of the overall design and positioning. The enclosure blocks the tablet speakers and access to a headphone jack, as well as the power button. The blocked power button has been an issue in Detroit in particular, where tablets have been unplugged and died (other regular outlets were available but charging cables were removed from USB ports). This has been problematic because even when plugged back in and fully charged, the tablets need to be turned back on with the power button, which requires unlocking the mounts.

Keeping Track of Mount Keys
It is important to identify in advance with project partners who should hold the mount keys for each site. Most mounts come with multiples that can be split up amongst a project coordinator, laundromat staff, and/or librarians. The laptop mount keys are all the same but most tablet mounts have different keys so it is important to label them.

5

Tracking the Technology

It is imperative to organize and track your devices, equipment, and accessories from the beginning to make things easier in the long term. To accomplish this, you can utilize a simple labeling system to identify each device:

- Label the back of the device itself and then record where each device is installed (laundromat and even table location).
- Label all mount keys!
- Additionally, see the WALI Tech spreadsheet in *Appendix 7.1* for an example of how to organize this information.

Installing the Technology

6

Planning ahead

- Work with the Owner and Managers of the laundromat site. Discuss space layout, get the Wifi Password, identify usable dumpsters, find out if there is storage space and where cleaning supplies are located.
- Draft a general floor plan so you know the location and placement of all furniture, tech stations, and outlets.
- Hire a contractor if your budget allows.
- Don't forget the finishing touches that make a WALI site special such as: book donations, signage, resource pamphlets, and their acrylic pamphlets holder.
- Do an inventory of all your supplies so you know what needs to be installed and how long each installation will take
- Plan to use a full day for 2-3 sites. In San Antonio, we installed two sites in four and a half hours. In Detroit, we installed three sites in 11 hours. This could vary greatly depending on travel time and the complexity of the site design.
- Prep the technology and make sure to configure everything ahead of time. Test devices in advance and get familiar with how they function.

Internet Connectivity

7

Negotiating with Laundromat owners

- Discuss the possibility of an open network for customers
- Determine whether or not customers need to sign on in order to use the Wi-fi

8 Maintaining the Technology

Computer Security and Privacy
The balance of respecting and protecting the privacy of WALI users while collecting data to assess, demonstrate, and increase our impact is crucial. LWB library partners adhere to extremely strict privacy policies that we can draw from, but our situation is a bit different. One major difference is that library users usually use a library card to log in to a library computer, whereas LWB WALI Chromebooks wouldn't differentiate between individual users. Because of this, LWB data collection is at a more general level, speaking to the group of users rather than being able to point to any one person's actions.

For more information, view this terms of service statement LWB US created for users in *Appendix 7.2*. Additionally, see information see the *ALA: Library Privacy Guidelines for Public Access Computers and Networks*. (https://tinyurl.com/586red2b)

Managing User Sessions

LWB US typically uses managed guest sessions, which makes the most sense for our users in terms of the lowest barrier to use as well as for privacy and security reasons. Creating specific public WALI user accounts may also be a viable option depending on the needs of your site.

Web Filtering

A web filter, also called content-control software, is a piece of software that restricts what websites a user is able to access by preventing the browser from loading pages that may be harmful (or deemed inappropriate). Because the web filter has access to all of the websites a user is accessing or attempting to access, it can also provide helpful data. Web filtering is a good strategy to protect WALI Chromebook users from malicious websites, censor inappropriate content, and collect data at the same time. LWB US currently uses GoGuardian, an educational web filtering service. In 2020, the GoGuardian licenses cost $7 per device per year.

CH. 8 HOW TO TRAIN PARTNERS AND STAFF TO WORK IN A LAUNDROMAT

Introduction to WALI Programming for Partners

A WALI site training for partners aims to meet the following objectives:

- Creates an opportunity for facilitators, partners, librarians, laundromat owners, and staff to come together
- Provides a brief background on WALI history and information specific to your WALI site
- Sets expectations and guidelines for engaging with laundromat patrons
- Walks partners and staff through the physical WALI space and laundromat layout
- Introduces partners and staff to the tools used for programs evaluation and data collection

Creating a WALI Training Tool

This tool can be a PowerPoint, video, or whatever medium that is most comfortable for you and suits the needs of your site. You can consult the General WALI Training Guide (See Appendix 8.1) as a template, or view an existing training guide, such as this one (https://tinyurl.com/nvm7cby2) used at a San Antonio WALI site. Feel free to also create your own training guide. Below are several components that may be useful to include in your guide.

WALI and Site-Specific Background

- Recount the mission of the Wash and Learn Initiative
  - Why a laundromat? The importance and goals of hosting programming in laundromats
- What's special about your specific WALI site? You can briefly mention its history, founders, and community partners that made this possible
  - Mention site-specific details such as neighborhood demographics and size of the laundromat
- Introduce partners to the Laundry Literacy Summit (https://tinyurl.com/nddxyx4b) and Laundry Cares Foundation(https://laundrycares.org/)

Review Community Needs Assessment results, and how your site will work to address these community-specific needs. If you have not conducted a Community Needs Assessment, see the guide in Appendix 8.2 to find out more.

Programs Training

- Give partners an overview of existing programs, and brainstorm ideas for adapting these for your community
- Share concrete tips for engaging laundromat patrons of different ages (from the Laundry Literacy webinar)
  - Walk around the laundromat before beginning a program session, especially if the program is new to the community. Personally invite patrons to join your session or even display the activity you're doing.
  - Keep it simple. Don't overwhelm people with too much information about your workshop session.
  - Even if patrons decline to participate, remind them you'll be back the following week.
  - When working with children, make sure that their parents are aware
  - As your wrap up the program session, be sure to thank the patrons that participated, and let them know when you'll be back at the site

Preparing Your Training Session

Who should I invite?

- Library staff and program facilitators, involved or potential partners, laundromat staff
- Connect facilitators with the laundromat staff. These will likely be the same workers that will be there during the weekly programming sessions.

Logistics Planning

- Time
    - How long should the presentation be? Take into account people work other jobs and have outside obligations.
    - Create a doodle poll to see what dates and times work for stakeholders. Send this survey to your stakeholders via email to set up a training time.
- Location
    - The training space either needs to have the necessary presentation tools (e.g. projector, screen, tv, audio, etc.) or someone needs to bring these tools and set them up before the training
    - The space also needs to be large enough to accommodate all attendees of the training session
- Refreshments (optional)
    - Coffee and light snacks
    - When communicating with stakeholders before the training, ask if there are any allergies to consider

Presentation materials

- Prior to the training, print out handouts for stakeholders to follow along
- You can use supplementary visual aids such as this youtube video about WALI in Detroit (https://tinyurl.com/4k43xxk4) to introduce WALI programming at other sites

During the Training Session

Warm-Up Exercises

- Brainstorm a list of “ice-breaker” activities to help guests get comfortable with each other
- Walk around and showcase different elements of the WALI site (e.g. children’s area, adult tech station)
- Discuss specific programs or activities that the facilitators are interested in bringing to the laundromat

Practice engaging patrons

- In small groups, have facilitators practice introducing themselves to laundromat patrons
- Facilitators can each practice troubleshooting scenarios they may encounter:
    - Scenario 1: Patrons are trying to engage with your invigorating workshop but the television is so loud that some participants are having trouble focusing and are getting very frustrated.
    - Scenario 2: You started your curriculum and it requires 20 minutes of concentration in the beginning. Another patron arrives late and wants to participate in the session.
    - Scenario 3: You walk into the laundromat and there are no people in the laundromat. What are strategies you can put in that will have people show up in the future?
    - Scenario 4: You have four laundromat patrons that are interested in attending your session. One person wants help creating an email, one person needs help applying for a job, and one person just wants to go on Facebook. What do you do?
    - Scenario 5: You are in the middle of your workshop and the Wi-Fi temporarily shuts down.
    - Other: Facilitators can come up with their own scenarios

Wrapping Up

- Review the contents of today’s session
- Reserve time to answer any questions that come up
- Lastly, be sure to clean up and put away any equipment you used before you leave; it’s best to not leave the laundromat staff any extra work to do

After the Training

Conducting a Post-Training Survey

A post-training survey is a useful tool for gaining direct feedback from facilitators who attended the session. The survey helps to assess how effective the training was, in terms of preparing facilitators to lead WALI programming and helping facilitators understand the background and mission of WALI.

The survey helps to highlight what facilitators think will present the biggest challenge to programming sessions, so future training can provide more guidance on those specific issues. For example, in a WALI Training Survey (https://tinyurl.com/4zj2t9n2) LWB conducted in 2019, results found that more facilitators were concerned about what to do if there were no community members in the laundromat if several patrons had different needs at the same time and if problems occurred with the Wi-Fi or technology. Others were also concerned whether a noisy laundromat environment would affect the overall learning environment.

This is also space for facilitators to share feedback on the training session and share any special topics they want more guidance for. For instance, if a facilitator feels they need more assistance with using the WALI technology for programming, you can follow up and reach out via email (provided in the survey) to provide more personalized support.

From your survey responses, you can determine whether the focus of your training needs to shift or if certain topics still need to be addressed. You can conduct your post-training survey using the WALI survey linked above as a template, or adapt the questions to create your own.

Looking forward

As you review responses from the post-training survey, determine if another training is necessary. If so, determine attendees’ preferred meeting times and dates for future check-in meetings.

WALI AND THE COMMUNITY

CH. 9 CREATING A COMMUNICATIONS PLAN

WHAT IS COMMUNICATIONS?

Communication strategy plays a big role in how laundromat patrons can maximize their time and potential within the WALI program, an objective that requires both librarians and WALI participants to be on the same page. By helping the public gain awareness of WALI's presence within their community and the programs provided, you can help build a sense of efficacy and longstanding relationship for the people engaging with the WALI site.

QUESTIONS TO CONSIDER

1. Who are you trying to reach?
2. Are the programs being put on dedicated to a specific community?
3. How can you best reach that community?
4. Who are the leaders within that community? They are typically a pulse and connecting point between organizations and the people.
5. What forms of media are best to reach that community?
6. What outreach efforts are already in place? What efforts are missing?

CREATING A COMMUNICATIONS PLAN

I am ready to reach out to people in my community about WALI and its programs. Where do I start? In order to fully engage the public about WALI, it is valuable for you to craft a story around what potential the programs can provide for the community and this is best done through creating a **core message.**

To do this, first ask, "What kind of a story do I want to tell? Then, consider your tools. Tools for telling a compelling story can include:

- High-quality pictures, like the photos from the Baltimore WALI Launch Event. These (shown at right) tell the public what a WALI site looks like and who is involved.

These photos were taken at the Baltimore WALI's site launch event in 2019. You can use examples of visual media like these to promote your WALI story in your own communications plan.

Other tools to include in your communications toolbox:

- Promotional videos. For an example of a video created to explain the WALI mission and its implementation, see Appendix 9.1.
- Testimonials or anecdotes from your WALI patrons or partners.
- Statistics on your site. For more on how to ethically collect data about the needs of your community or how to evaluating your WALI program using data-driven metrics, see Chapters 2 and 4.

Also consider the use of logos and branding initiatives to promote your WALI site as well as affirm your existing partnerships.

- Showcase the logos of partners, from library and programming partners to the logo of the laundromat.
- Create a Community Logo Contest! To see an example of a logo contest for our site in San Antonio, see the image at right or *Appendix 9.2* for the full document
- Display the logos of your funders in your communications
- Design a unique brand kit for your WALI site

INSTITUTE of Museum and Library SERVICES

SAINT PAUL PUBLIC LIBRARY

HOW TO PITCH TO THE PRESS

Below are six steps recommended to get started with pitching your WALI story to the press, followed by additional resources curated by LWB US.

1 **Find news outlets and/or journalists to pitch to.**

Create a list of local media outlets and journalists within your area. Searching for an email is the best lead for communicating with local media.
Reaching out to them and introducing yourself before sending in your story will be the most professional approach to pitching to the press.

2 **Consider what story and information you want to be promoting and how it will be presented.**

What information does the community need to know about WALI? Where could patrons find more information if they are interested? Who should this news story be directed to? What medium will the story be in?

3 **Write the pitches.**

The pitches should include relevant information regarding the program.

4 **Send your pitches.**

Prior to sending them out, check for correct names, pronunciation, and visible contact information so you can be reached to avoid miscommunications and streamline the transaction.

5 **Follow up.**

As journalists are very busy, it can take 2 days or even up to a week to hear back. Reach out to them to follow up if you don't hear a response within 5 days.

6 **Be persistent.**

Don't be discouraged by rejections, if you do not hear back. Try to reach out to other media outlets.

SHARING YOUR MESSAGE

When creating a plan of action for engaging with community members, it is important to know who the audience that you are trying to reach out to is and the multiple methods available to do so such as:

- Social media
- Print media
- Website promotions
- Programming promotions
- Events and presentations
- Local and national press coverage

Provided below are examples of previous communications efforts from our past WALI sites, including templates, content, and social media calendars, and language from sample posts.

Social Media

LWB US has created a Guide to Posting on Social Media, which highlights tips and best practices for tailoring your posts. These include how and when to use hashtags, maintain consistency in branding language, as well as how to engage followers online. To view the guide, please see *Appendix 9.3.*

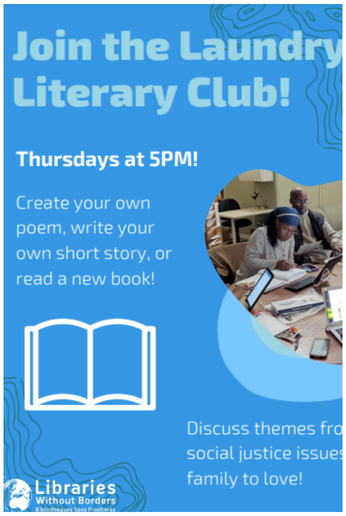
Consider also creating a custom content calendar for to promote your WALI site digitally. A content calendar is used to plan social media posts - what content will be shared, on what platform, and when. For an example of LWB US' social posts in August, please refer to Appendix ##.

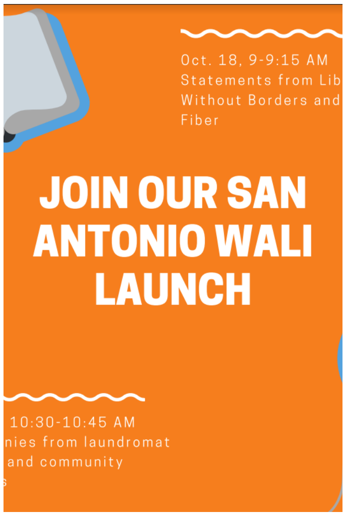
Print Media

Types of print media that can be utilized for WALI communications include flyers, posters, stickers, and information packets. Flyers, such as the two examples shown at the upper right, can be useful for programs and events promotion, as well as to highlight key community partners and services.

Websites

Consider placing strategic promotions at the following: Laundromat site, the LWB US-official WALI website, partners' websites, or donors' websites.





Examples of print media used to promote new programming at Baltimore WALI (left) and the launch of a new WALI site in San Antonio (right). Flyers were created in Canva and saved as PDFs for distribution.

Programming, Events, and Presentations

Hosting events and programs have shown to improve the foot traffic to the WALI programs, indicating their effectiveness as a communication tool to get the message and mission of the program established. An option to publicize these events, programs, and services, is to create a programming schedule, like the one shown below for Hipp Laundromat. At this WALI site, programs and services offered include assistance with job searching, writing resumes and cover letters, one-on-one tech help, homework help, library card sign-ups, and more.

Print programming schedule for Hipp Laundromat, a WALI site in Baltimore, MD.

Further, sharing about your WALI initiative at events, conferences, or other presentations is helpful to promote public awareness.

CH. 10 PLANNING YOUR COMMUNITY EVENT

INTRODUCTION

Why are community events important? Community events serve multiple purposes: they help spread public awareness of your program, are an "official" launch date/experience, and are a great way to introduce Wash and Learn Initiative (WALI) partners to the community with whom you are working. When developing the overall WALI budget, we strongly encourage you to consider setting aside a sum solely for events. What that amount looks like will vary. Please see the budget section of the Wash and Learn Toolkit for more information.

The first large event you can expect to host is your launch event, which will serve as a basis for the rest of this chapter. This guide can be adapted, however, for any event you host in the future.

PLANNING

FIRST STEPS

Finally, all my hard work has paid off, and we're finally launching the site! But, where do I even begin?
To ultimately host and successfully execute your event, you will need to:

- Select a location
- Select a time and date (with partners involved)
- Draft a guest list
- Prepare communications
- Plan activities
- Procure equipment and supplies (tables, chairs, decorations, etc)
- Schedule catering
- Create a Run of show
- Meet with partners to discuss the Run of the show
- Consider additional factors
- Draft backup plans!

The order of these steps may vary, but you can expect to deal with each one at some point prior to your actual event.

WHEN AND WHERE

One of the first things you will need to figure out is **when** and **where** you will host your event. For a WALI launch event, it is assumed that the event will be hosted at your selected WALI laundromat site. Stay in touch with the laundromat owner and staff and express your interest in hosting an event at the location. By this time, you will also need to work with partners to determine when will be the best time to host the event. Begin coordinating with who will be attending the event as an "exhibitor" (this could entail them tabling, hosting a program, or some other involvement aside from solely attending). Settling on a date may be difficult due to conflicting schedules and depending on who plans on attending the event. Prioritize your partners when selecting a date, but try to align a date with when the laundromat will be at its busiest.

COMMUNICATIONS

Who, specifically, do you want to attend your event? Leverage your event and invite potential partners, funders, and media relations to your launch event. This is a great opportunity to show the potential of your WALI laundromat. For the San Antonio WALI launch event, an entire spreadsheet was created with dozens of current partners, potential partners, community leaders, and essentially anyone remotely connected to WALI. Invite as many people (community orgs, potential partners, residents of the community) as you can, with the idea that not everyone will make it. Invitations are still a great way to spread the word about your program.

GUEST LIST

How will you publicize your event? Publicity for your event will work at various levels through grassroots communication (flyers, signs, banners) and local multimedia agencies (tv stations, radio, print). Think about who you are targeting (who you want to show up) when beginning your communications plan. Consider using social media to advertise your event, if you would like the general public to attend.

Emailed invitations also count as a communications strategy. When emailing invitations, send out **Save the Date invitations** *at least a month* before your event so people can reserve time for your event (see below). Send out additional reminder emails as your event approaches but be tactful and don't flood inboxes with event reminders. Depending on whether or not you are working with a public relations firm to advertise your event, getting local media to attend may require additional work. Reach out to local journalists and local radio and tv stations to publicize your event with a prepared "pitch". A pitch briefly describes your event and provides important details like when and where your event will be held. Like a regular invitation, you may want to send out your pitch document with a month or so notice. For an extensive overview of what communications look like, please refer to the "Communications" section of the toolkit. Finally, you'll want to hire a photographer to document your event. This depends on your budget. Do not assume that you will be able to take pictures of the event yourself.

Save the Date invitation for the San Antonio WALI launch event. In addition to the details of the event, the promotion features free laundry, made possible by the funding partner, Google (not pictured).

ACTIVITIES

What is going to happen during your event? Activities during your event can range from giveaways, programming, tabling, or whatever else the community is interested in showcasing to others (some events even have performances). The laundromat is an interesting space for this event, so be sure to thoughtfully consider the location. You can even try mapping out the location and layout to better prepare. Generally, your activities will depend on what is available. However, keep in mind that the launch event is a great opportunity to introduce your partners to the community. Encourage partners to bring information regarding their services, small giveaways, and maybe even an example of what the community can expect at WALI programming.

PROCUREMENT

What items do you need for your event? Visualize your event and identify what you may need. If you are having a guest speaker, you may need to get some sort of podium and audio/video equipment (microphones, speakers, projectors) for your event. If you are inviting many guests and are anticipating a lot of people, it is a good choice to rent tables and chairs. Get quotes for the equipment you need. If some of your invited partners have their own tables, see if they are available for the event. This step of your event planning process should be done with notice, especially when working with outside vendors. Do not wait until the last minute to order items.

CATERING

Will your event have food? Does your budget allow you to purchase food? If not, you may want to try and solicit food donations from local restaurants. Truthfully, this may be an uncomfortable process but you'd be surprised by the generosity some may show. Local restaurants may be more generous than franchise restaurants as they have a vested interest in their community. Refer to Chapter 16: Obtaining Corporate Sponsorships for tips on how to solicit food donations for your event.

RUN OF SHOW

Why are community events important? Community events serve multiple purposes: they help spread public awareness of your program, are an “official” launch date/experience, and are a great way to introduce Wash and Learn Initiative (WALI) partners to the community with whom you are working. When developing the overall WALI budget, we strongly encourage you to consider setting aside a sum solely for events. What that amount looks like will vary. Please see the budget section of the Wash and Learn Toolkit for more information.

The first large event you can expect to host is your launch event, which will serve as a basis for the rest of this chapter. This guide can be adapted, however, for any event you host in the future.

THINGS TO CONSIDER

What am I missing? Consider “little” things such as where you and guests will park. An extremely beneficial exercise to help you prepare is to visualize yourself as the three persona’s of interaction: yourself, a partner, and an event guest. Start from arriving at the event location all the way up to leaving the event. Walk through the event and consider how each persona will interact with the event environment. This exercise should help you consider things you may have originally overlooked.

BACK-UP PLAN

What am I missing? Anticipate problems and plan for them. Partners may drop out due to conflicts. The internet may stop working. Your event may run smoothly or it may not. We cannot control outside factors, but we can control our response. Do not be discouraged by an event that isn’t going as planned. Don’t let them see you sweat! Some problems that you may come across are:

- Internet outage
- Rain
- Partners dropping out
- Late/absent deliveries for food and equipment

On the day of your event, a number of unexpected scenarios can occur. You don’t need to plan for every scenario, but you should at least have a backup plan for your event.

CH. 11 LAUNCHING YOUR COMMUNITY EVENT

INTRODUCTION

The day of your launch is finally here! Review this section for tips to plan a day-of launch event that is certain to be a success. Create a Run of Show, or an item-by-item sequence of the day's events, well in advance, and day-of all you will have to worry about is executing whatever you previously outlined.

ARRIVAL & SET-UP

It's a good idea to plan to arrive early to begin prepping the space. How early you arrive depends on your setup. For example, in San Antonio, the parking spots in front of the laundromat were used as an area for seating and guest speakers. The local project coordinator arrived early to block off the spaces with cones so no one could park there. Early arrival gives you the opportunity to prep your space for any incoming volunteers or assistance that will arrive at a later time. This is a great time to review your Run of Show and make sure you're on schedule.

Whether you are doing this alone or with assistance, start setting up your space. Execute your plan. Setup should be completed with time to spare before your event begins - either for any unanticipated problems or to double-check everything is in motion. Make sure to properly convey information to volunteers who are helping. You may even want to consider having a "deputy" to be a reference point for questions and concerns while you attend to the rest of the event.

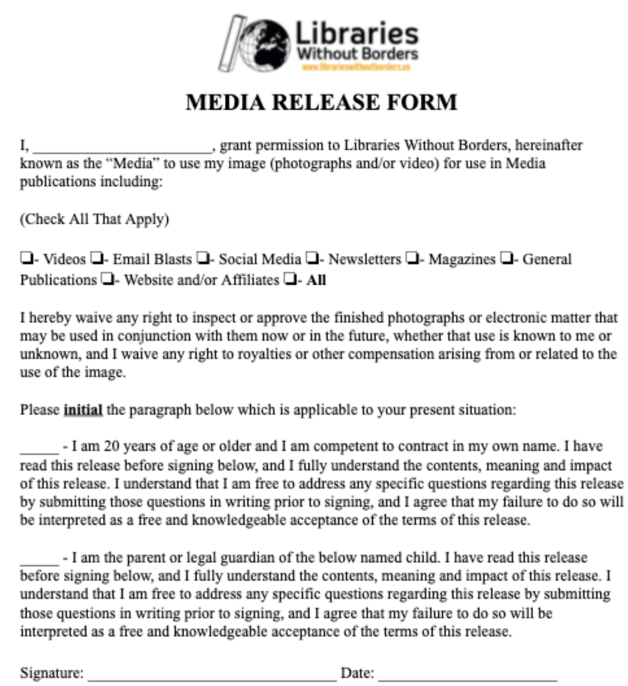
GUESTS

Guests are anyone present at the laundromat/event. People are bound to ask questions and provide comments. Having guests sign in is a good way to understand attendance and gain contact information for future reference (interviews, questions, etc).

MEDIA & PHOTOS

If the media is attending your event, be ready to answer their questions. It's also recommended to have a media release form for any laundromat customers that may be interviewed (see below).

Have a photographer or videographer capture your event with pictures of customers interacting with your event. Photos of customers interacting with library or facilitating staff are extremely helpful and can be used for fundraising campaigns, online promotion of your program, and sharing with potential funders. These visuals are powerful tools for expressing your program to those who may have trouble understanding the concept of WALI.



Libraries Without Borders

MEDIA RELEASE FORM

I, ________________________, grant permission to Libraries Without Borders, hereinafter known as the "Media" to use my image (photographs and/or video) for use in Media publications including:

(Check All That Apply)

❑- Videos ❑- Email Blasts ❑- Social Media ❑- Newsletters ❑- Magazines ❑- General Publications ❑- Website and/or Affiliates ❑- **All**

I hereby waive any right to inspect or approve the finished photographs or electronic matter that may be used in conjunction with them now or in the future, whether that use is known to me or unknown, and I waive any right to royalties or other compensation arising from or related to the use of the image.

Please **initial** the paragraph below which is applicable to your present situation:

_____ - I am 20 years of age or older and I am competent to contract in my own name. I have read this release before signing below, and I fully understand the contents, meaning and impact of this release. I understand that I am free to address any specific questions regarding this release by submitting those questions in writing prior to signing, and I agree that my failure to do so will be interpreted as a free and knowledgeable acceptance of the terms of this release.

_____ - I am the parent or legal guardian of the below named child. I have read this release before signing below, and I fully understand the contents, meaning and impact of this release. I understand that I am free to address any specific questions regarding this release by submitting those questions in writing prior to signing, and I agree that my failure to do so will be interpreted as a free and knowledgeable acceptance of the terms of this release.

Signature: ______________________________ Date: ______________________

Sample media release form that grants permission for LWB US to use photographs and video from participants in communications. To access a copy of the form, see Appendix ##.

CH. 12 FOLLOWING UP AFTER YOUR COMMUNITY EVENT

INTRODUCTION

What do I do after the big day? Congratulations — you've made it! The hardest part is over and you can finally take a deep breath, right? Not so fast! Just because the event is over, doesn't mean there's nothing left for you to do. Now is the perfect opportunity to follow up with everyone involved in the event, thank them, get their feedback, and gather visual materials to share your story and promote your Wash and Learn Initiative (WALI) laundromat(s).

Here are a few simple ways to build on the buzz of your event and keep your supporters engaged:

- Debrief internally and ask for feedback from your team (post-event survey)
- Collect marketing and communications material
- Send 'Thank you' notes and 'Sorry we missed you' emails to no-shows
- Assemble a recap and share your story!

THE ART OF FOLLOWING UP

STEP 1: DEBRIEF

How do I analyze the event's success? A SWOT analysis is a strategic thinking technique used to help identify strengths and weaknesses, opportunities, and threats related to project planning. Completing a SWOT analysis is completely optional but is a great opportunity to analyze how your event went. These are a quick but effective strategy to identify strengths, weaknesses, opportunities, and threats related to your program or event. Templates for completing an analysis can be found online or you can quickly put one together in a document file.

STRENGTHS *What were the existing advantages? What went well?*	**WEAKNESS** *What were the existing disadvantages? What didn't go to plan?*
OPPORTUNITIES *What are actionable improvements for future events or projects?*	**THREATS** *What can we anticipate being a problem for future events or projects?*

STEP 2: RECAP

How do I get the word out? Assemble all photos taken at the event and choose the best for a recap that is easily shared. This could mean putting together a quick one-pager, a slide deck, a video, or even just an email with attached photos. Having recaps of events and projects, in general, is an asset that can be shared with potential new partners and funders. The advantage of recapping an event yourself is that you are able to construct your own narrative. While having press at the location is an excellent method to reach large audiences, the story they share may not provide as many details as you'd like.

Some suggested highlights to share about your event include:

- Overview
- Number of people in attendance
- Organizations represented
- Notable speakers
- Pictures
- Anecdotes
- Special thanks to volunteers and sponsors
- Location
- Links to associated news coverage

You can tailor your recap to reflect your message however you like, but remember to distribute the recap within a week after the event!

STEP 3: THANK ATTENDEES

Maintaining contact with current and potential partners is essential and that includes niceties. Be cordial and express gratitude to your partners for attending your event. Not only does this show how pleasant you are to work with, it also gives you the opportunity to share the recap you put together.

Make sure to also send “Sorry we missed you” notes to guests who registered but didn’t show up for the event.

STEP 4. SHARE THE STORY

After you have created your recap and have assembled links to related news coverage, develop a plan to distribute that information. Sharing the recap in your thank you email to people who attended your event is not significant coverage and ultimately only leads back to individuals who are already aware of your program. Sharing the story means sharing it across your social media platforms, using the correct tags and handles, mentioning the right people, and continuing to spread the reach of your program and cause.

CONCLUSION

The more work you have invested into the planning stages of your event, the smoother it will go. Planning events is an exercise in organization and does require time. All of that time and work is an investment into your program. A successful event will more than pay itself off through its publicity and interaction with the community.

FUNDING WALI

CH. 13 MANAGING SUSTAINABLE FINANCES

BUDGETING CYCLE

After your grant proposal has been approved, there are a number of steps that must be taken to ensure that the project is financially sustainable.

STEP 1

Take your grant budget and convert it to a format that's easy to work with for the organization. If you have multiple grants for a single project, we recommend using a single spreadsheet. If you have multiple grants for different projects, we recommend using multiple spreadsheets instead.

Tip

Make sure your budget only features funds that are guaranteed, or at least very likely to come through. Don't rely on verbal promises of funding!

You could refer to Appendix 13.1 which shows a simple budget template for you to test out for a first-ever budget, or you can refer to Appendix 13.2 for a more detailed version that mimics the format LWB uses. (You need to be comfortable with the SUMIF formula to use the second one.) Please remember these budgets are for your internal use. A budget you submit to a funder looks quite different! If you're unfamiliar with math on Microsoft Excel, try watching a few videos such as "Excel Formulas and Functions Tutorial(see Appendix 13.3)".

STEP 2

After you have formatted your internal budget, keep the following in mind to ensure your budget remains up-to-date and viable:

Upkeep

Make sure to keep a copy of the original for your reference. Update it on a regular basis (monthly / quarterly) and also as needed, whenever you need to report actuals or when you've made, or plan to make big purchases. If multiple people work on the upkeep, make sure they all know what they're allowed to modify and when.

Reporting actuals refers to the practice of reporting what was actually spent rather than what was predicted to be spent. Funders sometimes request very detailed expense reports—be sure to ask what they expect from you!

STEP 3

In regards to spending, your purchases should stay within your budget, but they should also meet the quality needs of your work (consider finding discounts online, requesting non-profit discounts if applicable). As you spend, make sure you have a healthy cash flow. To do this, for one, make sure you understand the funder's timeline and practices for reimbursement, if applicable. Secondly, make sure to establish clear terms of payment with any contractors (i.e. a 30-day standard deadline for payment after they give you an invoice requesting payment).

Records

Keep all your receipts/invoices tidily organized and well-labeled. For example, the LWB standard label is MM.DD.YY VENDOR (AMOUNT) PROGRAM, EXPENSE TYPE, NOTES.

Healthy cash flow means ensuring you have enough cash to cover your spending (administrative and project-specific) at all times! If your funder promises to reimburse you for project expenses, ask yourself: do you have enough cash on hand to spend upfront?

BEST PRACTICES

Reporting Actuals

After you've spent down your funds, keep in the mind the following best practices for reporting actuals:

1. Make sure you understand the funder's requirements, especially concerning documentation
2. Provide as much detail as they require and no more
3. Include helpful charts and summaries. It is a good practice to note what percentage of the funds has been spent and what percentage remains to be spent; include a chart that summarizes total spending per category.

For instance, LWB has encountered some funders that only require a short narrative report of the work that was done. On the flip side, some funders have required extremely detailed reports, totaling dozens of individual expenses reported one by one, with backup documentation (receipts, invoices). Sometimes we've also had to submit multiple revised versions of these reports, depending on the funder's specific requirements. It helps to ask if they have a preferred template for you to fill out!

Carryover and New Funds

1. Make sure you obey restrictions on your funds.
2. Make sure you format a new budget for every period (this could be a fiscal year or a period specific to the funder).
3. Keep notes in your old budget that remind you exactly how you closed it and how you carried over any funds (it helps to keep separate notes document that records all the changes you make and any reminders for yourself about them).

Restrictions on your funds refer to specific requirements the funder imposes on how you use the funds. The funder can restrict the purpose (for example, requiring that you only spend on a certain location, or on certain kinds of supplies), or the time period of the funds (such as requiring that you spend everything by the end of the year).

For example, given the COVID-19 pandemic, LWB has had to request permission from many funders to pause our programs and rollover funding to the next year. Once that written permission was granted, LWB took note of which funding sources essentially "froze" for the year and carried them over untouched to the next year's budget. On the flip side, some funders were unable to allow these interruptions or extensions, so we worked with them to find safe and useful ways to spend the funds in favor of the communities we serve (in one case, we stocked up on supplies for next year's programs, which the funder deemed appropriate).

New Negotiations with Funders

1. Clearly explain the gap in funding for existing projects, or explain why an extension will not affect the original intent of the funds.
2. Explain how new projects build on work that has already been done. See the chapters on Establishing Initial Partnerships (page 61), Corporate Sponsorships (page 57), Corporate Partnerships (page 68), and Sustaining Long-Term Partnerships (page 65) for further information.

FISCAL SPONSORSHIP

What is fiscal sponsorship?
Fiscal sponsorship refers to the practice of non-profit organizations offering their legal and tax-exempt status to groups— typically projects— engaged in activities related to the sponsoring organization's mission. This involves a fee-based contractual arrangement between a project and an established non-profit.

What are its benefits?
Funders will often require that grant or donation recipients have 501(c)3 tax status, and your organization may not have that. A fiscal sponsor could apply for the funds on your behalf, receive them and disburse them to you. **We strongly encourage you to see these relationships with non-profits as an opportunity to establish strong, collaborative partnerships.** Though the immediate benefits of fiscal sponsorship are quite strong (i.e. you eliminate tax liability for the funding and you have access to a wider pool of potential funding sources), the extra effort of finding a good partner who shares your goals and ideals can take your project much further. A 501(c)3 partner may be able to offer you project support and access to new expertise that can make the most out of your efforts.

Regardless of the kind of relationship you establish with a fiscal sponsor, keep the following in mind:

- *Regularly maintain this relationship*. Ensure transparency on funding. From grant proposals to budget management, to actual reports— meet regularly with your fiscal sponsor, share documentation, and make sure you're on the same page about how much funding is coming in and where you plan to see it spent. Use those same meetings as an opportunity to envision the long-term success of your work, and plan for new funding accordingly.
- *Ensure clear roles and responsibilities*. Ask what kind of back-end work your fiscal sponsor will do for you, and ask what part of your funding covers that. Fiscal sponsors often prepare reports for funders, which is in direct service to your project. They also undergo general administrative projects (like reporting their taxes) that involve the funds from your partnership along with their own activities. This kind of work justifies a fiscal sponsor's request for an administrative fee or HR funds off your grants. Learn each other's needs and plan accordingly.

PROJECT PLANNING

Costs

1. Plan around your project - consider for example cleaning supplies because tables and toys in a kids' area get messy, and tech should be sanitized between uses
2. Remember to inflate your budget slightly to account for taxes and shipping
3. Write your partners/staff into grants and make sure that you're transparent with how much funding there is for them
4. Write research and evaluation into your grants (ie survey incentives for the project planning phase and for during- and post-work evaluation)

Community needs

1. Survey regularly to assess what is needed and how existing work addresses those needs
2. Make sure to fundraise according to the needs rather than establish projects that address unrelated matters

CH. 14 GRANT WRITING HOW-TO AND TOOLS

INTRODUCTION

What are grants?

A grant, by definition, is a sum of money given by a government or other organization for a particular purpose. Grants are different from donations — obtaining them usually requires a detailed application process, and the funds may come with specific conditions. Further, the funder may request reports from you about the project's development and results.

What does it mean to write a grant?

Grant-writing refers to the process of applying for grant funding. An application for a grant is usually called a grant proposal. Funders usually provide specific instructions on what information to include in a grant proposal, and it's important to follow these guidelines carefully.

How do I write a grant?

Grant proposals usually include a narrative section that describes the project and the organization behind it; a statement of need that explains why it is important and necessary; a timeline or plan of action that explains how the project will be completed; a budget justifying what it will take to get the work done; and an evaluation plan that outlines the project's expected outcomes and metric indicators for evaluation. Besides the actual writing, grant-writing involves research, planning, outreach, and follow-up. Read on to learn more about these steps in detail.

GRANT WRITING PROCESS

Tip

The purpose of grant writing is to convince an organization or person to fund your proposal. Taking the time to properly plan and research before you begin will make writing the grant more efficient and organized. With proper planning at the very beginning, you're less likely to make critical mistakes that could lead to the rejection of your proposal.

STEP 1. RESEARCH AND DISCUSSION

Gain a full understanding of the project you want to enact: design and practical and interesting ideas and meet with the appropriate partners to develop a cohesive and convincing plan of action.

Important Goals for Your Plan of Action

- **Make a budget.** Each of these funders will want a budget and specifics on how you will spend their money.

- **Rationalize your requests.** Funders will want a logic model, a document that outlines what you need to achieve your goals and what your outcomes and outputs will be. A logic model is a tool used by funders, managers, and evaluators of programs to determine the effectiveness of a program.

- **Provide examples of past performance.** This could be stories of clients that you have helped or it could be the number of people you have helped. Funders typically want to see a track record of success from those to whom they provide financial support. New organizations are likely to have a challenging time getting grants from funders with whom they do not have a proven track record or relationship.

STEP 2. FIRST CONTACT

- **Reach out** to foundations that publish their phone number or email address
- It's a good idea to contact the funders that you want to approach — **before you write your proposal** — to be sure you clearly understand the funder's guidelines and that your proposal is a good fit.

Discuss whether your nonprofit is a good fit with the grantmaker and clarify any questions we have. For more information on grantmaker, visit FCOnline.FoundationCenter.org/.

STEP 3. WRITE AND SUBMIT

- Follow along with Elements of a Grant (see Appendix 14.1)
- Make sure to check out the Common Mistakes to Avoid section below.

STEP 4. FOLLOW UP

- If your organization is rejected, follow up and ask why. This will give you a better insight into how to improve your grant applications for the future
- If your organization is selected, maintain open and clear communication with the grant source committee so you are sure to fulfill the grant requirements and follow the timeline.

ANATOMY OF A GRANT PROPOSAL

Above all else, remember that the grant proposal is essentially a plan. This plan shows the prospective funder that you know exactly what you want to do and how you're going to do it—and all you need is their financial support to make it happen.

Here are also some quick tips to remember:

- Do not use personal pronouns (use your organization name or acronym instead of "we")
- Avoid passive language
- Include intro sentences stating the exact response, then dive into detail
- **Re-use the funder's own language** (shown on their website, grant questions, etc.) in drafting your responses.

Organizational Overview

- Tell a compelling story about your organization and its accomplishments. Why is your organization qualified to do this project?
- Be persuasive and demonstrate you are prepared for the challenge. Now's your chance to stand out from the crowd!
- Some funders will ask for your organization's financials (historical and/or current status) so be prepared to supply that information

Statement of Need

Describe the circumstances that led to your project. Do your research and find specific evidence that shows your project is necessary. Try to help the funder stand in the shoes of someone benefiting from your project: what made it helpful? Why didn't other resources fulfill this need?

Helpful Tips

- Ask yourself: why did you originally think of this project? What led you to believe it was necessary? **Anecdotal evidence is a good start**, so take note of experiences you and other community members have had that exemplify the need for your project.

- **Back up those stories with hard facts**. An elementary school teacher may note, for example, that her students consistently struggle in English class. What do the standardized test scores for reading in your county suggest? How well-funded are public school reading programs in the area? Who usually attends programming at the public library—and who doesn't? For those who don't—why?

- Think creatively about the kinds of resources you can consult to obtain this information, but always check for reliability. Official sources like government reports and databases, or those published by respected research institutions like Pew Research Center, will give you the most credibility.

Narrative or Project Description

Explain what the project is about. In doing so:

- **Inspire the reader's imagination.** What will your project achieve? Who will it serve? Make sure you focus on the potential of the solution rather than lamenting the problem.
- **Be clear and specific about your plans.** Avoid generalizing (say you serve students between ages 8 and 12, not "young people") and avoid over-promising (say you expect to distribute 50 books during the first month and explain why it's a significant change). Citing specific research also makes your work more credible!

Organizational Overview (continued)

- **Include a timeline.** Some funders like Gantt charts, which are visual representations of a timeline in a table with boxes filled in for every time period (columns) dedicated to a specific activity (rows). You can find examples online.

Budget and Supporting Materials

Some grants are unrestricted, meaning they aren't meant for a specific project, and those won't require a budget. For a project grant, the funder will definitely ask you for a budget; that is, a plan of how you intend to spend the money. You may also be asked for other supporting materials, including documentation that backs up your projected costs.

Read the instructions carefully to make sure you understand what the funder is asking—and when in doubt, do reach out and ask. Occasionally, the grant application will require you to use their specific budget format so pay attention to whether they provide a form.

The budget should cover two basic components.

- **Revenue** - that is, the money you receive. If you have other sources of funding besides this grant, include them, and mention whether you have secured them (like existing funds or other grants) or whether you expect them but have no guarantees yet (like donations you expect to receive). Include any forms of in-kind revenue as well as money that you received, are receiving, or will receive for the project.
- **Expenses** - that is, all the costs related to your project. Include everything: staff costs, supplies (one by one, with unit prices and estimated quantities you'll purchase), transportation costs (never underestimate these), shipping costs, taxes, and any others your project will require. Give fair estimates; don't assume things will be cheaper just to make the budget look better. Where possible, back up your numbers with evidence like past expense history or quotes from vendors.

The clearest way to format a budget is on a spreadsheet, but you can also make them with tables in a word processor. Occasionally, the grant application will require you to use their specific budget format so pay attention to whether they provide a form. Be sure to **assign an individual line to each budget item unless the grant instructions state otherwise**. And remember: the budget should demonstrate to the funder why the exact amount you're requesting is exactly how much you need to make the project happen. It's better to ask for more funding and have the funder give you a bit less than to ask for a cautious amount and have the funder give you less than your cautious amount.

Monitoring and Evaluation

Convince the funder that you understand the problem at hand by explaining how you'll measure the solution. How will you know that your project has made a difference? We recommend that you distinguish between outputs and outcomes and take advantage of both to be persuasive. Sometimes a grant's guidelines will explicitly ask for a separate section with this information.

- **Outputs** are the tangible end products of your project, and they can usually be measured with numbers. How many books will you distribute? How many people will benefit from the program? Outputs can also be the specific activities you undertake: for example, partnerships created or events held. Additional examples include the number of kits made, number of laundromats transformed, number of mobile hotspots served, number of clients impacted.

- **Outcomes** are the impacts of your project, and they can be specific to individual people or also general for a community. For example, will school-aged children change their attitude towards reading? Will adults develop a particular skill that will improve their quality of life? Outcomes are the whole point of the project, the main benefit that people will get from your efforts. How does a person's life change after this project?

Besides defining outputs and outcomes, you'll need to explain how you'll measure them. This measurement process is called evaluation. Here are some questions you should answer to **develop an evaluation plan**:

- **What tools will you use**? Surveys are a common example.
- **When will you use them**? You could evaluate at the very end of the project, or at intervals throughout and compare results over time. It's strongly recommended to evaluate throughout and make improvements along the way.
- **What will you evaluate**? You'll want to evaluate people in order to measure outcomes, and things or events to measure outputs.
- **Who will evaluate?** Consider the time and effort that evaluation requires. Make sure someone is held accountable for these efforts, and that this person or organization's hours are included in the budget.
- **How will you evaluate**? There are different types of important evaluation: process, outcome, and impact. You can read more about different evaluation types in Appendix 14.2.

Some projects hire the services of professional evaluators to get an outside opinion on the impact of a project. If you would like to pursue this option, make sure to conduct thorough research and find well-credentialed professionals. Make sure you include this cost in your budget too!

Sample Language for Monitoring and Evaluation

You might find it helpful to use a simple table to link your project activities to your evaluation plan. We suggest creating columns for:

- **Outcomes**
  - Example: Redesign 2 San Antonio Wash and Learn Initiative sites in line with COVID-19 safety standards
- **Activities**
  - Example: Develop a series of re-opening "phases" to better understand when WALI can resume in-person programming
- **Outputs / Deliverables**
  - Example: A three-phase WALI reopening process
  - Example: Surveys for laundromat patrons to engage in the redesign WALI process
- **Evaluation**
  - Example: Work with community partners to determine the number of laundromat patrons attending each in-person and virtual workshop and training
- **Indicators**
  - Example: Number of laundromat patrons that respond to the WALI survey
  - Example: Percent of laundromat patron survey respondents that feel safe in the WALI space

COMMON MISTAKES TO AVOID

Proposal lacks significance

- Why should the grant committee care? It's important that the grant committee is also excited about the work you are doing
- Clearly state the target community and how the project will improve conditions
- Ask yourself: Why are you applying for a particular grant? "Because we need funding" is not an acceptable answer. To increase your chances of being accepted, clearly describe the need that your project will meet in the community and how it will make a significant impact for good.
- **Be a good storyteller.** How can you get the person reading your proposal to fall in love with your organization? The key lies in the story you tell. If you can perfect the art of storytelling, your grant proposals will stand out.
- **Focus more on solutions than problems**. Grantmakers want to know how you're going to accomplish your objectives even more than why.

Weak or absent preliminary data

- You should have already implemented your work and are able to show the outcomes through tangible data
- Tell how your organization's work is different from other nonprofits in order to set yourself apart
- Include a description of methods, measure outcomes, how you overcame/adapted to problems

Overambitious goals

- Limit specific aims to what you can realistically accomplish during the grant period
- **Target a specific project for your proposal if you are applying for a project grant.** The majority of grants are awarded to a specific cause as opposed to just general support. By focusing your grant application on a single project, you will increase your chances of getting funded. And be detailed—this will show that you've clearly thought through how the project will be executed.

Failed to follow guidelines

- Make sure you know exactly what the grant committee wants in terms of materials, format, eligibility, timeline, etc.
- **Be sure your budget makes sense**!
- Being precise and professional is important

TOOLS AND TEMPLATES

Assessing Opportunities

Foundation Tracker: Initial Review

Foundation Name	Date of Review DD/MM/YYYY	Staff Member Completing Review	Action Plan
			☐ Review in-depth (has potential) ☐ No further action (no potential) ☐ Watch (review in 6-12 months)
			☐ Review in-depth (has potential) ☐ No further action (no potential) ☐ Watch (review in 6-12 months)
			☐ Review in-depth (has potential) ☐ No further action (no potential) ☐ Watch (review in 6-12 months)
			☐ Review in-depth (has potential) ☐ No further action (no potential)

You can use this template to keep track of potential foundations and grant opportunities, as you research, jot down important details and note what contracts need follow-up(For the full document, see Appendix 14.3).

Opportunity Summary

Funder: ______

Program Officer: ______

Contact Information:

Email: ______ Phone: ______

Opportunity Title: ______

Funding Opportunity Number: ______

Funding Instrument Type: Grant ☐ Cooperative Agreement ☐

Application Due Date: ______

Application Page Limit: ______

Submission Process: Email ☐ Grants.Gov ☐ Hard Copy ☐ Other ☐

Project Period:

Submission Process: Email ☐ Grants.Gov ☐ Hard Copy ☐ Other ☐

Project Period: __________

Award Amount: __________

Geographic Location: __________

Cost Share Requirement Yes ☐ No ☐

Will funder accept questions on funding opportunity: Yes ☐ No ☐ Unknown ☐

If yes, what is the due date to submit questions? __________

Project Description

Goal:

Objectives:

Result Areas:

Other Details (e.g. selection criteria, page limits by section, whether this is a follow-on project or new grant, who the likely competitors will be etc.):

Once you dig into an opportunity you can use this template to gather critical details. You can use this form to begin to build your application or to cater an existing application to a new opportunity(For the full document, see Appendix 14.4).

Planning, and Writing a Grant

- Letters of Inquiry
  - Sometimes foundations will prefer that you send a Letter of Inquiry instead of or before you submit an application. These letters are short and sweet and are intended to provide enough information to determine if it's a good fit. You can find this guide by Joanne Fritz at https://www.thebalancesmb.com/how-to-write-a-letter-of-inquiry-loi-to-a-foundation-2501958 which teaches everything you need to know about LOI and provides some examples.
- Budget and Purchase Template
  - A simple template for a program or project budget(see next page). You may need to add columns or sections if your budget is more complicated or remove the existing revenue sources section if you don’t have other sources yet.
  - Notes: you can break down your budget into subcategories so it is easier to interpret. For example, you can put all your projected travel costs in one subcategory titled "Travel Costs" and all your projected supplies costs in one subcategory titled "Supplies Costs"
  - You can use the purchase tracker(see next page) to keep track of specific expenses and their receipts after you make them.
  - To view the full google sheet, see Appendix 14.5.

Budget Template

Revenue / Income				
	Specific Revenue Source	**Cost**		**Notes / Description**
	Grantor name / fund source	$ -		
	Grantor name / fund source	$ -		
		$ -		
		$ -		
	Subtotal	$ -		
Expense Subcategory 1				
	Specific Expense	**Cost**		**Notes / Description**
		$ -		
		$ -		
		$ -		
		$ -		
	Subtotal	$ -		
	Admin Fee & Indirect Costs	$ -		
	Grand Total	**$ -**		
Expense Subcategory 2				
	Expenditure	**Cost**		**Notes**
	Subtotal	$ -		
	Admin Fee & Indirect Costs			
	Grand Total	**$ -**		
	Current Resources	**$ -**		
	Program/ Project Cost	**$ -**		
	Gap	**$ -**		

Purchase Tracker Template

	Date of Purchase	Description	Receipt / Link	Amount
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
			Grand Total	**$ -**

The Basics of Preparing a Budget for a Grant Proposal

- Visit https://www.thebalancesmb.com/the-basics-of-preparing-a-budget-for-a-grant-proposal-2501952 where you can find a guide by Heidi J. Kramer which starts from the basics and takes you through the process of creating a great budget for a grant proposal.

Tips for Grant Writing

- **Spell out the need.** Why are you applying for a particular grant? "Because we need funding" is not an acceptable answer. To increase your chances of being accepted, clearly describe the need that your project will meet in the community and how it will make a significant impact for good.

- **Differentiate yourself.** Tell how your organization's work is different from other nonprofits in order to set yourself apart. To be honest, it's rare for a nonprofit to be accepted for a grant without an existing relationship with the foundation, so most first-time grant proposals are rejected. That said, you significantly up your chances of getting a "yes" if you can set your organization apart from the masses.

- **Target a specific project for your proposal.** The majority of grants are awarded to a specific cause as opposed to just general support. By focusing your grant application on a single project, you will increase your chances of getting funded. And be detailed—this will show that you've clearly thought through how the project will be executed.

- **Eliminate industry words and jargon.** Every industry has its own jargon; nonprofits are no different. But to appeal to the majority of foundations and corporations, it's best to eliminate all internally used acronyms and jargon. Tell your story from the heart, in words that everyone can understand.

- **Lose the $10 words.** The best grant proposals are easy to read, concise and understandable. Always.

- **Be a good storyteller.** How can you get the person reading your proposal to fall in love with your organization? The key lies in the story you tell. If you can perfect the art of storytelling, your grant proposals will stand out.

- **Focus more on solutions than problems.** Grantmakers want to know how you're going to accomplish your objectives even more than why.
- **Be sure your budget makes sense.**
- **Do not use personal pronouns (say "LWB" instead of "we")**
- **Avoid passive language.**
- **Include intro sentences stating the exact answer, then dive into detail; if a longer response, include an intro paragraph that spells out what the next paragraphs will describe.**

- Proposal Submission Checklist

Proposal Narrative – Contents & Formatting Requirements

- ☐ Cover Page
  - ☐ Name of proposal/project
  - ☐ Name of submitting organization and any partners
  - ☐ Submission date
  - ☐ Organization contact information (mailing and/or physical address, phone, email)
  - ☐ Name of organization's authorized representative (and their signature, if required)
  - ☐ Solicitation number (if relevant)
  - ☐ Disclaimer statement (if relevant)
- ☐ Acronym List
- ☐ Table of Contents (TOC)
- ☐ Headings and Subheadings
  - ☐ Headings: Arial 16 pt, black, bold
  - ☐ Subheadings 1: Arial 14 pt, black bold
  - ☐ Subheading 3: Arial 14 pt, blue [RGB#__________]
  - ☐ Subheadings 3: Arial 12 pt, black, italicized
- ☐ Page Numbering
  - ☐ Consecutively numbered, starting on the executive summary page
  - ☐ Format: "Page – 1"
- ☐ Header and Footer
  - ☐ Header Text: [proposal name] centered
  - ☐ Header Design: Blue bar [RBG#___________] length of page, below proposal name
  - ☐ Header Font: Arial 12 pt, black
  - ☐ Footer Text: [name of organization] far left, page number far right
  - ☐ Footer Design: Blue bar [RBG#_________] length of page, above organization name
  - ☐ Footer Font: Arial 12 pt, black

Annex

- ☐ Fly sheet included for each section of annex (Annex A: [title of annex]) font: Arial, 36 pt bold, black, centered
- ☐ Pages number consecutively within each section (e.g., Annex A – p. 1)
- ☐ Required annexes
  - ☐ Annex A: [enter name]
  - ☐ Annex B: [enter name]
  - ☐ Annex C: [enter name]

Budget Justification

- ☐ Cover Page (should look identical to narrative proposal)
  - ☐ Name of proposal/project
  - ☐ Name of submitting organization and any partners
  - ☐ Submission date
  - ☐ Organization contact information (mailing and/or physical address, phone, email)
  - ☐ Name of organization's authorized representative (and their signature, if required)
  - ☐ Solicitation number (if relevant)
  - ☐ Disclaimer statement (if relevant
- ☐ Acronym List
- ☐ Table of Contents (TOC)
  - ☐ Top 3 levels only
  - ☐ Include list of attachments
- ☐ Headings and Subheadings
  - ☐ Headings: Arial 16 pt, black, bold
  - ☐ Subheadings 1: Arial 14 pt, black bold
  - ☐ Subheading 3: Arial 14 pt, blue [RGB#__________]
  - ☐ Subheadings 3: Arial 12 pt, black, italicized
- ☐ Page Numbering
  - ☐ Consecutively numbered, starting on first page after TOC
  - ☐ Format: "Page – 1"
- ☐ Header and Footer
  - ☐ Header Text: [proposal name] centered
  - ☐ Header Design: Blue bar [RBG#___________] length of page, below proposal name
  - ☐ Header Font: Arial 12 pt, black
  - ☐ Footer Text: [name of organization] far left, page number far right
  - ☐ Footer Design: Blue bar [RBG#_________] length of page, above organization name
  - ☐ Footer Font: Arial 12 pt, black

Budgets

- ☐ Budget 1: Organization budget for Years 1- 3, project period: MM/DD/YYYY – MM/DD/YYYY
- ☐ Budget 2: Partner budget for Years 1 – 3, project period: MM/DD/YYYY – MM/DD/YYYY
- ☐ Header and Footer text, if applicable
  - ☐ Header text: [project name] centered
  - ☐ Footer text: [organization name] left justified, page number far right

Submission Process

- ☐ Deadline: MM, DD, YYYY by X am/pm EDT
- ☐ Narrative proposal and budget information should be sent in separate emails
- ☐ Narrative proposal should be sent to: [enter names and email addresses]
- ☐ Copied on email for narrative proposal: [enter names and email addresses]
- ☐ Cost proposal should be sent to: [enter names and email addresses]
- ☐ Copied on cost proposal email: [enter names and email addresses]
- ☐ Each email should be no larger than 10 MB
- ☐ Use approved email template for text of email
- ☐ Subject line of each email should be: [proposal type e.g., cost] - [proposal name] - [organization name] - email #x of x

Post-Submission Procedures

- ☐ Confirm receipt of proposal by funder
- ☐ Save narrative proposal and annexes to shared folder in [name of specific location, e.g., SharePoint site]
- ☐ Save cost proposal (budget and justification) to [name of specific location, e.g., SharePoint site]
- ☐ Distribute final narrative proposal to [enter names of colleagues and partners]
- ☐ Schedule meeting to discuss proposal process and collect lessons learned. Meeting attendees [enter names]

Other

- ☐ [enter]
- ☐ [enter]
- ☐ [enter]

CASE STUDIES

Applying the Elements of a Grant Proposal

- Narrative/Project Description
  - Write about your organization and what you have done in the past. Outline the project, program, and financial need, and what you hope to achieve.
  - Include a timeline for your project with major milestones and action steps.
  - Note any additional funding here and how it was used.
  - Determine how you will measure your impact, both quantitatively and qualitatively.
  - Some funders will require an **executive summary.** This is a concise, single-page overview of everything. A well-written summary will compel the reader to read the full proposal.
- Statement of Need
  - Present evidence to convince the reader of the need for the project. Convey how your organization understands the problem and how you will plan to fix it. Include accurate data and up-to-date statistics.
- Organizational Overview
  - Organization's history, board members, mission statement, and current impact.
- Budget
  - Include a revenue and expense section.
- Supporting Materials
  - Follow the requirements stated by the funder. Include all they are asking for and if you are missing an element, reach out to the funder and inquire more.
  - May vary depending on the funder.

Case Study #1: San Antonio Area Foundation Rapid Response(see Appendix 14.6)

- Narrative
  - The narrative in this grant proposal is broken up into sections with each section having a character limit. Thoroughly explain your project and use the maximum number of characters available.
- Statement of Need
  - This section is supported with data and statistics that are linked to the narrative so readers can review the source. Knowledge and references to the problem and the location show the organization's understanding and expertise in the area. In this specific grant, impact areas are identified by zip code and demographic information is provided.
- Organizational Overview
  - This proposal asks for an overview of the board along with a staff list of the organization.
- Budget(see Appendix 14.7)
  - This budget is broken down into line items and funds were received by wire. With the budget in hand, it is important to maintain an internal actuals budget that coincides with the intended budget.
- Supporting materials
  - This narrative asks for the current budget of the organization.

Case Study #2: IMLS Grant Proposal
(see Appendix 14.8)

- Narrative
  - This is a larger and much more complex grant proposal. Be sure to adapt your grant proposal to the nature of the funder. A larger proposal will require more detail which will, in turn, lead to a longer narrative. Make sure your narrative fits the needs.
- Budget
  - In this budget, you will notice that there is an approved budget along with invoice tabs. There are different methods used to disburse a grant. Some organizations may provide funds through check(s) or wire(s) and others may request the nonprofit submit invoices. Understand your budget and make note of any limitations. In the IMLS budget, there is a yearly limit along with quarterly summaries of invoicing.
- Supporting materials
  - In this grant, supporting examples of past digital content are requested. Shared are information platforms that LWB has and is currently using.

CH. 15 COMMUNITY FUNDRAISING

INTRODUCTION TO PEER-TO-PEER FUNDRAISING

> "Any opportunity to give kids access to information, technology, just any positive encouragement, is a plus."
>
> —**Omar Laurencin**, Detroit Wash and Learn Initiative laundromat owner

At its most basic level, designing a Wash and Learn Initiative (WALI) means transforming a laundromat into a community-centered learning hub that provides kids and their families with critical access to information. However, books, technology, cleaning supplies, and educational resources all cost a decent sum of money as well as require a significant amount of community support. One way to meet your dual goals of raising funds and ensuring community involvement? Design an online Peer-to-Peer campaign that empowers your supporters to create personal fundraising pages and raise money on your behalf.

What is a Peer-to-Peer campaign?

A Peer-to-Peer campaign is an online fundraising campaign that leverages the collective effort of individuals to raise money for a specific project. To successfully launch a Peer-to-Peer campaign that supports the financial needs of your Wash and Learn Initiative (WALI) laundromat, you must effectively tell your story and rally the people in your life and community to support your cause. By bringing together the community around your cause, you can not only reach your fundraising goals but you will also foster a deeper sense of community around your Wash and Learn Initiative (WALI) laundromat(s).

In this section, you will read about the benefits of a Peer-to-Peer campaign, the steps to launching one, and an in-depth case study of one LWB US example from August of 2020. Together, these sections will provide you with a well-rounded guide to fundraise for your very own WALI laundromat.

Three Reasons to Launch a Peer-to-Peer Campaign

1. **Strengthen your relationship** with supporters: By providing your donors with the ability to create their own fundraising pages and share their own stories about why your cause is so important to them, you give them the opportunity to feel personally connected to your nonprofit.

2. **Organically raise money** from your existing network. Leverage the connections you have and ask your friends or family to host virtual fundraisers for your cause. This type of personal investment makes it easier and more natural for individuals to then share the fundraiser with their own friends and family.

3. **Save time and money** by encouraging peer-to-peer fundraising efforts that allow donors to raise money on your behalf. This will save your organization time and money, both of which can be directed to support other aspects of the project.

HOW TO START YOUR PEER-TO-PEER CAMPAIGN

Step 1: Brainstorm

Approximately three months in advance of your expected start date, sit down with your team and brainstorm an idea that fits your cause and fundraising needs.

Step 2: Set Attainable Goals

Approximately three months in advance of your expected start date, confirm how much money your organization will set out to raise, how many donors you want to reach, and how many non-staff supporters you want to recruit for your campaign.

Step 3: Create Materials for the Campaign

Approximately two months in advance of your expected start date, begin drafting materials for your Peer-to-Peer campaign.

Know Your Audience: Before creating a Peer-to-Peer campaign, you need to define who it is that you want to reach through your efforts. By doing a bit of research, you can gain a better understanding of which audience is most likely to support your cause (i.e.

setting up a WALI laundromat, expanding programming at an existing site). Once you identify your target audience, you can design an outreach strategy tailored to their interests.

Tell Your Story: The success of any Peer-to-Peer campaign depends on how well you connect with your target audience. It also depends on how well you tell your story to your supporters through your existing communication channels in the preceding weeks and months. Write a compelling description of your Wash and Learn Initiative (WALI) laundromat — one that is clear and concise. Your story should be specific and create a sense of urgency for the project. By making your cause tangible, the audience will feel compelled to support it.

Once you've written your story, share it with someone who is not familiar with this project. Once they have read your story, ask them if they can answer the following questions:

- Do I know this organization?
- Do I trust this organization?
- Do I understand this project?
- Why should I care about this project?
- Do I trust this organization?
- How will this impact my community?
- Is it worth giving my money?
- Do I know where my money is going?
- Do I know how my money will support this project?

If the answer to these questions is yes, then you are in a solid position to move forward with your Peer-to-Peer campaign.

Step 4: Create a Fundraising Guide

Approximately one month in advance of your expected start date, create a fundraising guide for your supporters that helps them effectively tell a great story about your cause. You should plan to use social media to promote your campaign as well as push your supporters to broadcast their fundraisers on social media. We cannot stress this point enough, but your biggest supporters in a crowdfunding campaign are the people in your life! Friends, family, coworkers, and people in your community are your donor base. To get your campaign rolling, you should appeal to the people you already know for support. One easy and cost-effective way to do this is by leveraging your social media.

But before you invest in this approach, ask yourself the following questions:

- Do you have social media accounts that you use on a regular basis?
- Are most of your friends and family members online?
- Are you comfortable posting publicly that you're fundraising for your Wash and Learn program?

If the answer to these questions is no, you may want to consider ways to raise the money you need in a less public way or ask for help from someone you know who has a bigger online presence.

This fundraising guide should help your supporters understand how best to leverage their social media networks as well as provide templates that they can use to spread the word. For an example of what to include in this guide, as well as tips, tricks, and templates, check out the LWB US Literacy Lovers Campaign Fundraising Guide at the end of this section.

Step 5: Choose Your Crowdfunding Platform

Approximately two months in advance of your campaign's expected start date, you should choose an online fundraising platform(such as Global Giving, Classy, Funraise, QGIV) that matches the needs of your campaign. Remember: the success of your Peer-to-Peer campaign will rely on the capacity of your team (which may just mean you!) and the passion of your supporters. Select a platform that works best for what they need and want.

It's better to go with a platform you and your staff trust that can help you achieve your fundraising goals. From there, you can comfortably take the time to create great elements, stories, photos, and videos to populate the page and drive donations.

Step 6: Launch and Promote Your Campaign!

Your campaign has finally launched! Announce and promote your Peer-to-Peer campaign across social media channels. LWB US utilizes Instagram, Facebook, Twitter, and LinkedIn to get the word out about campaigns. Create rewards or incentives for individuals to participate in your campaigns, like free swag or prizes. Make it easy for supporters to give. Allow supporters to make a donation at any time, from any device, with a mobile-friendly campaign donation page. Additionally, make it easy to become a fundraiser. Let anyone sign up to fundraise on behalf of your cause, no matter where they are—all they need is an internet connection.

Step 7: Stay in Touch

For the length of your campaign, make sure to keep your supporters updated on your fundraising efforts. Don't just acknowledge, but celebrate each time you reach an important milestone (e.g. "We've reached 50% of our goal! Halfway there!" or "Just 25% more to reach our goal! Help us get to 100%!). Throughout this process, be sure to reiterate your mission and remind donors how their contribution will support your cause.

About 2-3 weeks after the campaign comes to an end, make sure to send a newsletter to all your donors so new donors know about the progress that has been made due to their support. And finally, say "thank you" again and again: tell donors how much their donation means to your cause.

To appropriately thank donors, LWB US sends handwritten thank you cards right after someone donates more than $25. LWB US sends a thank you email right after someone donates less than $25. One month after the individual donates, LWB US then calls the donor to thank them for their support. If there is no answer, LWB US sends a text message and a link to a Get to Know You Donor Survey. If there is no phone number on file, LWB US sends the individual an email with the survey link.

At the end of this section are examples of thank you letters. These examples include both shorter thank you notes sent to individual donors during the Literacy Lovers Campaign as well as a longer thank you message sent via email to all LWB US supporters.

CASE STUDY: LWB US LITERACY LOVERS CAMPAIGN

In 2020, LWB US launched a 2 week-long Peer-to-Peer campaign called the Literacy Lovers Campaign, encompassing staff, interns, and supporters. To follow along as we discuss details,
check out our Literacy Lovers Campaign page: https://give.librarieswithoutborders.us/campaign/literacy-lovers/c290458.

This campaign encouraged supporters in the LWB US network to reach out to their friends and family and introduce them to the organization. LWB US chose to end the Literacy Lovers Campaign on Book Lovers Day—a day that fits perfectly with our mission of access to information and educational resources. We strongly encourage you to tie your crowdfunding campaign in with fun holidays or important world events. In the end, LWB US had close to 100 people participate, bringing in around 85 new donors. Previously, LWB US only engaged 20-50 donors in each fundraising campaign, with only around 40% being new donors.

Key tips that ensured this success:

- LWB US highlighted the testimonials of people impacted by our Wash and Learn Initiative (WALI) laundromats via social media posts throughout the duration of the Literacy Lovers Campaign. By including real WALI users and testimonials, your crowdfunding campaign is sure to also attract a more engaged audience as well as remain mission and vision focused.

- Additionally, the Literacy Lovers Campaign called upon supporters to donate by providing a tangible cause and effect call to action on social media posts, including: “Donate $20 to support a child’s reading for three weeks....” It’s important to connect your call to action with the services that you are providing for your community.

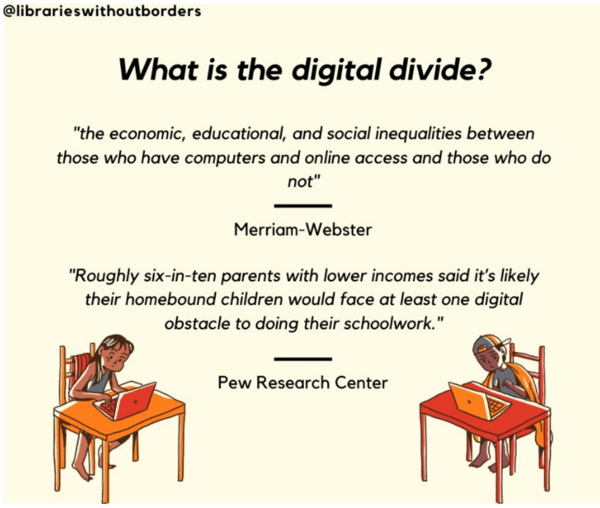
- Be sure to highlight the Wash and Learn Initiative success stories that inspired you to build a WALI laundromat in your own community, as well as the specific programming and outcomes that have happened at your own site.

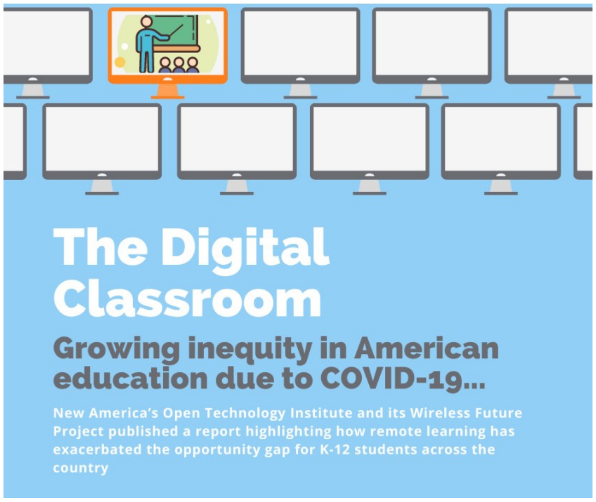
At the end of this section, you will find Libraries Without Borders US’ Literacy Lovers Fundraising Guide. LWB US shared this resource with supporters via email, offering details about the campaign, social media communication tips and tricks, and templates for social media posts, and thank you notes. For additional inspiration, take a look at the social media graphics LWB US used on the next page.

SOCIAL MEDIA GRAPHICS

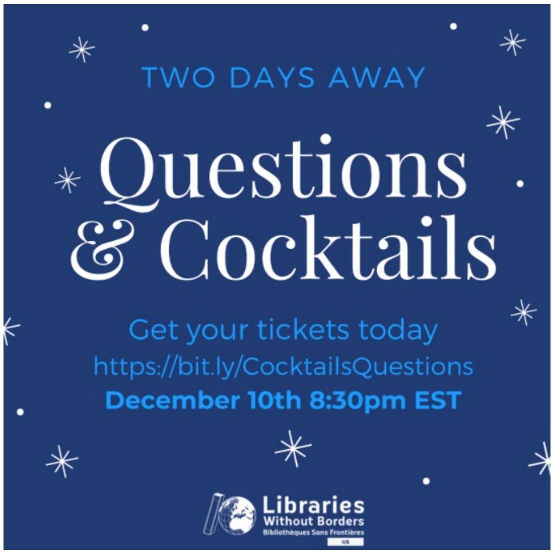
Social media posts used by LWB US and fundraising supporters to raise awareness for the fundraising campaign(top&left)

LWB US Thank You note for donors, shared on social media(top)





Social media advocacy posts shared by LWB US and supporters in order to increase awareness and raise support for LWB US' efforts(left)



LWB US social media post for an online fundraising event open to the public(left)

CH. 16 OBTAINING CORPORATE SPONSORSHIPS

INTRODUCTION

What is corporate sponsorship?

Corporate sponsorship payment is one in which the corporation contributes to an organization in exchange for the positive branding typically associated with the organization being donated to. Benefits for the corporation typically include brand associations with the non-profit being donated to as well as possible tax write-offs corporations gain in exchange for this donation. A legitimate corporate sponsorship contract will provide tax benefits for the corporation and help fund the nonprofit organization. In order to maintain these benefits, the nonprofit cannot advertise the corporation. Their logo may be present but their product cannot be endorsed, use comparative language, or mention price information. Once the corporation is advertised, the contribution becomes taxable.

What Tax Information Do I Need to Know?

Nonprofits need to know whether the income they receive as sponsorship money will be considered a **tax-free gift** or as **taxable advertising payments** which may trigger unrelated business income taxes. In order to maintain corporate sponsorship payments non-taxable, they must meet the definition of a qualified sponsorship payment. IRC Section 513(i) defines a "qualified sponsorship payment" as any payment made by any person engaged in a trade or business with respect to which there is no arrangement or expectation that such person will receive any substantial return benefit other than the use or acknowledgment of the name or logo (or product lines) of such person's trade or business in connection with the activities of the organization that receives such payment. Such use or acknowledgment does not include advertising such person's products or services (including messages containing qualitative or comparative language, price information, or other indications of savings or value, an endorsement, or an inducement to purchase, sell, or use such products or services).

Factors that may result in taxable income

- Exclusivity
- Providing an incentive to purchase a corporation's products or services
- Providing a link from the sponsor's name/logo on the nonprofit website to the page where the sponsor's product/service is sold. Same for a phone number that leads to where the product/service is sold
- Providing outside privileges to the corporate sponsor
- Accepting payment from the corporate sponsor that is contingent on the level of attendance at the nonprofits event
- Providing advertisements at no charge in regularly scheduled publications that typically require paid advertising

Factors that usually indicate charitable contributions

- Acknowledgment of the corporate sponsor by including name, logo, general phone number, locations, and internet address in printed media or on the nonprofit's website
- Neutral displays of a sponsor's product/service or the distribution of free samples of the sponsor's product at nonprofit events. The nonprofit MUST not endorse the product/service
- A single, static website link that takes viewers to the sponsor's home page, not to a page where a product/service is sold

Special note: some payments are both taxable and non-taxable. Some payments can be a mixture of charitable contributions and advertising payments. In this case, a portion of the contribution is taxable and will be classified as unrelated business income (UBI).

PROS AND CONS OF CORPORATE SPONSORSHIP

Is corporate sponsorship the right fit for your organization?

Pros:

- Win-win situation. Nonprofits receive funding and the corporation gets credit for being a "good citizen".
- Corporate collaboration increases visibility by linking to a high-profile company.
- Collaboration is the future. Few businesses are willing to give something for nothing.
- Helps the organization develop a business-oriented mindset that will help boost fundraising knowledge.

Cons:

- It's about who you know. If you don't have a contact, it's difficult to get into corporate sponsorship.
- Developing a partnership takes time. It may take months (or longer) to receive any sort of payoff.
- You may have to educate your own staff along with the corporate staff about the value of corporate sponsorships for both sides.
- Some may frown upon the collaboration because of the "taint of commercialism" they bring to the nonprofit.

Reminders:

- Corporate sponsors are not one-size-fits-all. Spend time researching potential corporate sponsors and find the one that will best suit your organization.
- It may help to have one of your board members make that initial contact with a potential corporate sponsor they know.
- Understand the business environment and learn how to talk to CEOs.
- Provide opportunities for the corporate sponsor to get to know your organization. Invite them to your events and share your publications with them.
- Before entering an agreement, have an attorney draw up a contract for them to sign. If they have one prepared, have your own attorney review it.

Ethical Dilemmas

Corporate sponsors are seeking a partnership that gives them something they cannot buy; a good reputation. These days, corporate sponsorships are typically seen more like business deals than cut-and-dry donations. Nonprofits need to know their worth, have business savvy, and maintain their core values when negotiating with corporations that may want exclusivity, multi-year contracts, and other benefits from the partnership. It's important to research potential corporate partnerships to make sure their mission and values align with the nonprofit. A nonprofit shouldn't twist its mission to fit a corporate sponsor's values. Designate a member of your nonprofit as a negotiating partner with the full authority of decision-making. Set ground rules when negotiating and when drafting a contract, make sure to include terms under which the nonprofit may end the agreement.

BEST PRACTICES FOR PURSUING A CORPORATE SPONSORSHIP

Is corporate sponsorship the right fit for your organization?

A nonprofit's reputation is its most valuable asset. As relationships and partnerships across the board become more complex in nature, it's important for nonprofits to have policies and procedures in place to maintain ethical relationships and agreements.

Before entering any sponsorship relationship, be sure to ask yourself and your organization the following questions:

- Does the proposed activity or the proposed relationship promote the mission and values of our organization?
- Will the relationship promote or enhance activities or organizations whose goals are inconsistent with the mission and values of our organization?
- Will the relationship maintain our organization's reputation for objectivity, independence, integrity, credibility, social responsibility, and accountability?

Getting Started

1 Consider the **nature** of your corporate sponsor. Understand their mission, ethical standard, and business practices. Entering a partnership with a shady sponsor will reflect poorly. Make sure the sponsor's values and ethics align with the nonprofit's own.

2 Consider the **goals** of your corporate sponsor. Why does the corporate sponsor want to work with your nonprofit? This goes back to the first point.

3 Consider any **conflicts of interest**. For example, a health-based nonprofit with a sponsorship from a major soda company. The separate goals do not align.

4 Consider the **role** of the corporate sponsor. Is the sponsor "hands-on" and is involved in the design and development process? Expectations should be identified and put into writing prior to the acceptance of an agreement.

5 Consider the **consequences** of a corporate sponsor. Is there negative press surrounding the sponsor? How would this reflect your nonprofit?

6 **Evaluate** the partnership. How do you fairly evaluate partnerships before making commitments?

Important Considerations

1 Partnerships must start with **mission-alignment**

2 Don't let corporate dollars distract you away from your mission

3 The corporation must understand you, the partner, and you must understand why you want to work with that corporation

4 Check for **authenticity**:

- There needs to be a mutual commitment that is genuine
- There needs to be a concrete positive impact that is the root of the partnership
- Does the corporation have the right policies in place?

5 Know your **point of contact**: It's a lot easier to move forward on an initiative if you know who you have to convince and who you have access to

6 **Mutually beneficial**: The partnership should benefit both the nonprofit organization and the business. These benefits should outway any costs to either entity

7 **Alignment of values**: Does the business represent the values of your nonprofit? Your cause should reflect the company's model or industry, and the business should operate in a way that is respectful to the perspectives and values held by your organization and its community members

8 **Open communication**: Communicate and agree upon expectations of the partnership. What are you hoping to get out of the partnership? What is the company hoping to gain from the partnership? Transparency is key to a fair partnership

SOLICITING IN-KIND DONATIONS

How to Ask for Donations

1 Start off by determining who you want to ask. A good place to start is locally. They have a vested interest in improving their own community and can then reap the benefits in the form of increased clientele and visibility. It's important to also consider that local businesses may not have large amounts of money/products/services to donate. If that's the case, look for grants sponsored by large corporations.

2 Once you've established who you want to ask, find a point of contact. This varies depending on the size of the corporation. It could be a dedicated corporate social responsibility staff member or it could be the owner when working with a small business. Either way, finding a point of contact will allow you to begin building a relationship with them and their business.

3 Determine what you can offer to the sponsor. Make sure your offers align with the definition of a qualified sponsorship payment.

4 Make your ask. This can be done either in a (one-page, signed) letter or in person. Be genuine and sincere. Research your proposal to make sure it is a reasonable ask.

5 After you make your ask, follow up. Reiterate positive points from previous interactions and emphasize how the donation will benefit the nonprofit and what you can offer in return. If they decide not to donate, offer other methods of partnership.

6 Say thank you (even when they don't donate) and follow through with your offers/promises.

How to Attract Corporate Sponsors

- Have an active, online presence that can include newsletters, emails, social media, blog posts, advertisements, and more.
- Know your donor demographics and why they engage with your cause.
- Offer testimonials of previous sponsorships (if available) in press kits/marketing materials.
- Know your competitive environment.
- Meet with multiple potential sponsors. Find potential cross-promotions with existing sponsors.
- Have a presence in your civic organizations.
- Always research new ideas for revenue-generating activities.

BUILDING PARTNERSHIPS

CH. 17 ESTABLISHING PARTNERSHIPS

TYPES OF PARTNERSHIPS

Type #1: Programming

The goal for any WALI site is for the local library to be able to take over the project, be the key stakeholder, and be involved. This means that program partners need to be compatible with you and your team but also the local library team. When setting up a WALI site, it's important to find partners that are willing and compatible to work with laundromat sites. Find partners that are committed to maintaining programming for your WALI community and can provide the resources and expertise. An effective WALI library programming partner should have:

- Previous experience operating outreach programs outside the walls of a library.
- Be able to dedicate a set of regular hours towards designing and coordinating a program that has identified a clear gap in the services and shortfalls of current programming.
- Examples of programming partners: local non-government organizations, university departments, a food bank.

LWB has partnered with libraries and legal service organizations in Rhode Island, Washington DC, and Maryland to deliver digital legal materials directly to community members at WALI sites. LWB identified a community need, recognized that LWB programming by itself could not fulfill this need, and partnered with legal service organizations to address this need.

Type #2: Fundraising

Funding partnerships are concerned with bringing in sources of money to keep the project going and/or expand its reach. These partnerships can be with corporations, private foundations, public entities, universities, small businesses, etc. Any entity that values your organization's work and can commit funds for an ongoing amount of time can be considered a funding partner.

FINDING PARTNERS

Identifying Needs for a Partnership

Reflect on your current plan for WALI as well as your future initiatives and determine where your project needs the most support. Ask yourself the following questions:

- Do you need help with adding workshops, training, and/or programming at the WALI site?
- Designing flyers?
- Coordinating a schedule?
- Bringing in funds to support HR and/or technology?

Use the above Types of partnerships list to determine what area of partnership you are looking for.

Search for and Identify New Program Partners

Coalitions: Coalitions are a group of nonprofit organizations and other actors that share the same goals, mission, vision. Coalitions take many forms – from formal recognized legal entities to less formal relationships without legal recognition. Coalitions can also be used for a variety of purposes. Coalitions are a great way to open your organization's network to other organizations open to partnering. Use coalitions in two ways: join them and expand your organization's network and review the organizations that are part of the coalition and reach out to any you might be interested in partnering with.

Community events: community events are a great way to meet potential partners and interact with their team members on a face-to-face level. Additionally, you can get a feel for their organization by how the event is run and who it is catered towards. Ask yourself the following questions:

- Is their programming catered towards the same community you want to work with?
- Does their mission align with your mission?
- Does their programming fulfill a need that your program lacks?
- Does the organization's mission focus on bringing access to education, information, and knowledge as well?

Online newsletters: Online newsletters are a great way to stay up to date within the nonprofit community and scope out potential opportunities on all levels. Like a Classifieds section of a newspaper, online newsletters will often highlight current events relative to your community, work other organizations are doing, and provide a wider look at what other organizations are doing. The following are a few newsletters that could be valuable to your organization:

- National Digital Inclusion Alliance: a platform to unify voices for digital inclusion policies and programs while serving as a bridge to policy makers and the general public. For more information on NDIA, please visit their website at digitalinclusion.org
- Nonprofit Technology Conference: NTEN supports organizations by convening the nonprofit community and providing them with professional training and skill sharing to help fulfill their mission. For more information on NTEN, please visit their website at nTEN.org
- Chalkbeat: a nonprofit news organization committed to covering the effort to improve schools for all children, especially those who have historically lacked access to a quality education. For more information on Chalkbeat, please visit their website online at Chalkbeat.org

Public libraries: Public libraries are not only great partnership entities themselves, but they have a wonderful network of connections and can put your organization in touch with others in the community. Leverage their connections and resources.

Googling/the Internet: Utilize the Internet. Look up databases that list grant opportunities. Explore government funding options on the federal, state, and local levels. Visit the websites of private entities and see if they invest funds in nonprofit organizations.

Search for and Identify New Fund Partners

There are some questions to consider before searching for a funding partner:

- Does the WALI mission fall into the funders' area of interest?
- Where will your WALI site have an impact? Though the service area of a WALI site might be small, the impact of a WALI site can spread.
- Does the average grant size of the organization fit your needs? Maybe I need a large amount, but the foundation only gives small amounts or maybe I need a small amount, but the foundation only gives large amounts.
- Will you be required to match the grant, and if so by what %? Is it dollar for dollar? Or can it be in kind? Are you confident you can meet the requirements?
- Are the funds paid up-front, or is it a reimbursement? Foundation grants will give money up-front but other entities, typically offer an option for reimbursement
- Will the dollars arrive on time in order to fulfill your needs? Most foundations will not let you retroactively pay yourself. It is important to spend the funds when the funds come in. Will the funding timeline fit your WALI timeline?

Online newsletters: Make sure to check out government grant opportunities at grants.gov. This is a database that lists available government grants. Narrow the search by considering what you are eligible and not eligible for. Once you find an opportunity, give yourself a month at the minimum to work on the application. Additionally, check out the Grantsmanship Center at tgci.com. This is a database that lists state grant resources. Once you find a foundation that is serving your area, open the link for that foundation to find out how to apply and who to build a relationship with. Other online resources include Candid at candid.org and the Foundation Directory Online at fconline.foundation center.org.

HOW TO INITIATE A PARTNERSHIP

STEP 1. OUTREACH EMAIL

Before reaching out it's important to know that the partnership can be mutually beneficial for both parties and to explicitly state the benefits when reaching out to potential partners. Additionally, make sure the potential partner is a good fit for your own organization. This can be in terms of time, budget, commitment, organizational capacity, mission, etc. Send an email to the listed point of contact. See the example below, which was an email for initiating a programming partnership:

STEP 2. PROVIDE SPECIFICS

If you receive a response with demonstrated interest, send specific information as a follow-up. If you receive a response with demonstrated interest, be sure to set up a meeting to discuss. See the example below that details specific information about Libraries Without Borders.

Who is Libraries Without Borders?

Libraries Without Borders US (LWB) is a 501(c)(3) and the US branch of Bibliothèques Sans Frontières (BSF), an international non-profit based in Paris, France, that delivers access to information, knowledge, and education where it's needed most. From refugee camps in Bangladesh to laundromats in Oakland, we seek to provide equal access to resources for communities historically subject to systemic discrimination. LWB US is based in Washington, D.C., and runs programs in more than a dozen US cities across 8 states, Puerto Rico, and the District of Columbia.

What is this new initiative?

Libraries Without Borders is currently in the process of launching a new initiative at the Park Plaza Co-Op Community (a manufactured housing community, pejoratively known as a trailer park) in Fridley, Minnesota.

Sample Template for Email Outreach

Good Morning,

My name is [Name] and I am the [Position Title] or the Wash & Learn Initiative (WALI), a program with [Organization] that focuses on creating access to digital learning and community development by turning laundromats into libraries. I would love to talk more about your organization, learn about the different resources you provide to your community and find out how we can collaborate and partner in the future. Below, you will find more information about our organization and about WALI. Are you available at X date at Y time? I am free mostly in the [time/date] so let me know what works best for you!

Thanks and I look forward to hearing from you,
[Name, Position, Organization]

What is this new initiative? (continued)

Together in partnership with both the Fridley branch of Friends of the Anoka County Library and the Park Plaza Cooperative, our program provides a hotspot connection, computers and iPads (already pre-downloaded with educational and career-focused resources), books, arts and crafts activities, and furniture in the community's storm shelter. For more information on Park Plaza Co-op Community, please visit their website online at ParkPlaza.coop.

Where the partnership comes in

Based on the survey data we collected during a recent town hall, residents hope to engage in learning sessions that cover a variety of topics, including career advice, health advocacy, financial advice, legal information, and English language learning. We hope to partner with organizations that have the capacity to aid us in providing this programming. While the storm shelter library will be fully and constantly equipped with laptops, physical books, and iPads, these partnerships will also allow for formal learning to take place. During scheduled times, organized either weekly or monthly, our partners will provide structured learning, headed by a librarian or informed professional that can meet the niche needs of Park Plaza residents.

CH. 18 SUSTAINING LONG-TERM PARTNERSHIPS

INTRODUCTION

Partnerships are essential for great WALI programs. In order to cultivate an existing relationship for long-term growth, know that there are different criteria for different partnerships. This section will first address programmatic partnerships and then address funding partnerships.

PROGRAMMING PARTNERSHIPS

Communicating with an Established *Program Partner*

Schedule frequent check-ins with your established programming partner to review program attendance, feedback on current social media and outreach strategies, and program insight. For laundromat owners, LWB suggests you initiate contact whenever there is an update regarding the laundromat such as if a laptop is missing or you want to install something. For a WALI program partner, at minimum, there should be monthly contact either through email, video chat, or in-person meeting. More specifically, if there is a partner that works with the WALI site for more than 2 hours per week, meet biweekly. If there is a partner that works with the WALI site 1-2 hours per week, meet monthly. And finally, if there is a partner that works with the WALI site 1-3 hours per month, meet bimonthly. However, oftentimes, program partner meetings depend on their availability and involvement. But make sure to keep a meeting on the schedule at least once per month. Additionally, it's helpful to share promotional materials like flyers, posters, etc. with your program partners. Ask them for feedback and encourage them to share the final product with their networks.

Communicating with a Potential *Program Partner*

Keep in touch with potential partners too. If you know an organization that runs awesome programming, keep in touch regularly so that they know you're interested in holding their program at your WALI. For example, Cash Campaign of Minnesota originally shared workshop dates with LWB so LWB could direct folks their way. Later, LWB was able to bring Cash Campaign programming directly to our WALI Baltimore sites.

FUNDING PARTNERSHIPS

Program Needs

Consider your future initiatives. What is the budget for these initiatives and the timeline? What can this funder offer you? Does this initiative align with what the funder would like to support? Consider other programs or organizations that the funder has supported before. Would your new initiative(s) engage the funder? For example, LWB decided it wanted to do more work with the Baltimore arts community and provide an opportunity for engagement. In order to do so, LWB recognized that the organization was building out programs in Baltimore and it was necessary to hire a program assistant. LWB reached out to the National Endowment for the Arts, and after many positive discussions, applied for a grant.

Communicating with an Established *Funder*

Schedule frequent check-ins. The following are suggestions on how to engage an established funder on a regular basis.

- Normal Funder: Email them at a minimum of two times and set up a one in-person/over the phone check-in in between grant applications
- Extra Invested Funder: Have frequent check-ins and solicit project advice. Additionally, make sure to update the funder about budget changes.
- Once a year: meet with the funder to present a project report or interim report. This can also be done via email if in-person is less than ideal.
- Before a grant deadline: schedule a call if you are applying for another grant from this funder
- During a communications campaign: If the communication campaign takes place during a grant period of performance, send the funder a draft of your posts so they can approve it

It is important to establish a relationship with the funder so they know who you are, what you do, and are ready to help fund future initiatives.

Communicating with a Potential *Funder*

If you know of funders that fund your partner organizations or are invested in similar programs, reach out. For example, at the beginning of the 2020 COVID-19 Pandemic, LWB wanted to readjust its efforts and focus on rapid response work, working specifically on bridging the digital divide. While searching for grant opportunities, LWB came across the United Way and San Antonio Area Foundation Rapid Response Fund. LWB then reached out and had a conversation with the program officer about if the organization would be a good fit. After that conversation, LWB applied for and won the grant.

MANAGING POTENTIAL CONFLICTS

Clear Expectations

Make sure you sign a Memorandum of Understanding (MoU) with all your partners and explicitly state each party's roles and responsibilities in the text. The MoU is your foremost tool to keep folks accountable. Spend some time familiarizing yourself with its content and customizing the template to each partnership. For example, the example MOU found at the end of this section was signed between Libraries Without Borders and Anoka County Library in Anoka, Minnesota. Make sure to be clear about the terms of insurance, the timeline, and the WALI site's technology maintenance responsibilities above all else.

Initiate Check-in Meetings

If a partner isn't holding up their end of the deal, as clearly stated in the MoU, the situation could be discussed during a check-in meeting or brought up directly to the facilitator. Frequent check-ins serve as a preventative measure to discuss any potential conflicts with ease and allow for compromise. Make sure to schedule these well in advance and respect that schedule. Don't change the time or date unless absolutely necessary, and if necessary, let your partner know at least 2 days in advance.

Examples of Conflict Management

On one occasion, a librarian left a scathing report about a WALI location and repeated this commentary in person. The LWB team discussed this with authorities at the library and reassured them that LWB wanted to find solutions to have the WALI location meet their standards. LWB reviewed the librarian's commentary and adjusted the WALI site to solve the discrepancies. The takeaway from the experience was that LWB proved to our partners that the organization cares about their input.

When LWB first started WALI in June 2019 in Baltimore, LWB partnered with a local nonprofit that specialized in teaching coding to the community. LWB initially wanted the local nonprofit to run their program solely during the summer. In September, LWB and the local nonprofit met again to reassess the program and determine if the partnership should continue. However, after a successful meeting, the local nonprofit stopped communicating. After a few weeks of no response, LWB reached out for a check-in. There was no reply. LWB waited another few weeks and tried again. Still no response. After the fourth time reaching out, LWB internally decided to not move forward with the partnership during the late fall. Though the conflict was never resolved, this example shows the importance of staying persistent with inconsistent partners.

REASSESSING TERMS OF A PARTNERSHIP

Early Steps

Ask from the very start: what is the partner's capacity to run programs at the WALI site(s)? This question is important to take note of in order to set expectations that are agreed upon by both the partner organization and your organization. For example, Digital Harbor Foundation hosted weekly youth tech programs at LWB's Baltimore WALI sites. From the start, they planned to run programs in the summer, reassess in early September, and cut back after that if necessary. In another example, Amerigroup agreed to host a monthly workshop at two WALI Baltimore sites for a full year. They scheduled those workshops months in advance.

Along the Way

Design a post-workshop evaluation for partners to fill out after every session of programming that they conduct. That way you can monitor attendance, record feedback, and evaluate the program overall. You can refer back to this record during check-in meetings and brainstorm improvements. Ask yourself the following questions:

- Are your workshop facilitators overwhelmed?
- Do you need an additional person to help the program run more smoothly?
- Did a particular workshop go really well?
- What about that one made it so successful, and how can you replicate that experience?

Some examples of improvements could be editing fliers, refining your social media strategy, and asking librarians to promote the program. Make sure to evaluate the impact of any improvements. Take note of what works and what still has a way to go. Visit the chapter on Evaluating Your Program (Page X) for more information on how to create an evaluation plan, how to conduct an evaluation, and how to analyze the data from the evaluation process.

Give your programs time to make an impact. If you see a low level of engagement, Implement an improvement. Wait 3 months and determine the results of your improvement. If your program still isn't achieving the desired impact, implement another improvement and wait another 3 months. If your programming still isn't working, try an improvement one more time. After all this time and effort, if the program still isn't taking off and your improvements aren't yielding the results you or your partners want to schedule follow-up conversations.

Note the conditions established in your MoU. Focus on the conditions to keep the partnership running. If both partners are fulfilling their part, move on to the conditions of success. If these conditions are not being met, discuss the possibility of phasing out the program.

Near the End

The terms of your MoU will state the length of your partnership. If you're nearing the end date, ask yourself if you want to continue working with this partner. If yes, start discussing potential new goals for the future and begin drafting a new MOU. If not, thank your partner for the opportunity to work together and promise to keep them in the loop regarding the future of the program. For example, subscribe them to your newsletter. Your partnership might fizzle out over time due to infrequent contact, unresponsiveness, less commitment to the project. It's up to you to address this. You can ask the partner to end the terms of the MoU early or simply let the agreement run its course. If you choose the latter, though, make sure the terms of the MoU aren't holding you responsible for activities you can no longer do. Be very transparent with your partner about mutual expectations.

CH. 19 HOW TO BUILD CORPORATE PARTNERHSIPS

INTRODUCTION

Why are these corporate partnerships important? The numbers demonstrate that non-profit organizations today stand to benefit a great deal from forging partnerships with corporations.

- 86% of consumers believe corporations should take a stand for social issues
- 64% of consumers choose, switch, boycott a corporation based on social issues
- ⅔ of Millennials and Gen Z prefer corporations that take a stand
- Expectation that corporations stand for more than just profit

BEST PRACTICES

How to Build Sustainable Corporate Partnerships

1 **Do your research.** Identify potential corporations and look into the other nonprofit organizations they have partnered with in the past. Tip: Have a social media presence! Social media platforms are a great place to find and engage companies in your area

Questions to ask:

- Determine if your project models are still mission-specific, or are you trying to grow awareness about your nonprofit?
- What are your current and long-term needs?
- How can your organization support a company's goals?
- What is a previous partnership that successfully furthered your relationship?
- What existing resources do you have to support a partnership, and what benefits can you offer?
- What does this corporation have to offer other than money?
- Who does the corporation reach? (A corporation's audience can be a big asset)

2 **Reach out!** After identifying potential partners, reach out to their team and showcase your organization. Clearly showcase your impact and your vision for this partnership

How to engage with a corporation:

- Set your price – know your organization's worth! Know what you want the corporation to do for you
- Communicate your mission: If you want to develop lasting partnerships, you'll want your sponsors and employee volunteers to believe in your cause.
- Use volunteer engagement and management tools
-

Report on impact: Your corporate partners will get an accurate picture of your organization's mission and vision

3 **Maintain ongoing communications.**

- Keep open communication between an organization and the corporation
- Utilize existing frameworks: Mobilize employees to fundraise and volunteer
- Keep a record of the impact your partnership has had: this allows for further commitment to the relationship and allows corporations to showcase to their employees, shareholders, and customers

HEALTH LITERACY

CH. 20 CODE OF CONDUCT

WHY HEALTH LITERACY IN LAUNDROMATS

Health literacy is a critical pathway to better health outcomes. Yet for countless low-income families, health resources like those on MedlinePlus are simply out of reach. Some are unaware of its existence while others simply lack the digital skills to find what they're looking for. By meeting people where they are—in this case, at the laundromat—Libraries Without Borders (LWB US) strives to ensure that all people, but particularly those who have been historically marginalized (e.g. low-income populations, returning citizens, communities of color, recent immigrants, speakers of English as a second language), can access information and educational resources. Building on our national model, LWB US launched WALI Health in 2018. Through this initiative, we began to equip libraries and community partners with the tools and training they needed to bring health literacy programming to neighborhood laundromats. The following year, we began working with public health institutions and medical professionals to expand our health literacy programming at WALI Health laundromats. Since then, health professionals have played an integral role in this effort.

Through these early pilots, we gained greater insight into the factors—beyond lack of access—that contribute to low levels of health literacy and exacerbate existing inequities for members of marginalized groups, many of whom come from communities historically underrepresented in biomedical research. As a result, LWB US embarked on a new mission: the creation of a WALI Health Literacy Training.

CODE OF CONDUCT

This Code of Conduct was designed to promote integrity in the delivery of health information and services at WALI Health laundromats. It is meant to provide WALI Health facilitators (i.e. community based organizations, nonprofits, and anchor institutions participating in WALI Health programs) with a framework for:

- Fostering just and equitable relationships that recognize how each person holds privilege and power
- Acting appropriately when faced with ethical dilemmas
- Cultivating the trust that is necessary for effective work in communities

As a WALI Health facilitator, your duty is to build individual and community capacity by increasing access to health information, promoting knowledge about health and the health care system, and bolstering self-sufficiency through outreach, community education, and other support services.

The following principles guide all WALI Health programming:

- Honesty: You strive to ensure the best health outcomes for the communities you serve with through WALI Health. You communicate the potential benefits and consequences of available services, and respect the confidentiality of the individuals, families, and communities you interact with every day.

- **Integrity:** You promote integrity in the delivery of health information and services. You respect the rights, dignity, and worth of all people and have an ethical obligation to report any inappropriate behavior (e.g. sexual harassment, racial discrimination, etc.).
- **Cultural humility:** You have expertise in the communities in which they serve. You maintain a high degree of humility and respect for the cultural diversity within each community. As an advocate for your communities, you have an obligation to inform all relevant stakeholders when policies and procedures will offend or harm community members, or prove ineffective given community dynamics.
- **Anti-Discrimination:** You do not discriminate against any person or group on the basis of race, ethnicity, gender, sexual orientation, age, religion, social status, disability, or immigration status.
- **Respect for Human Rights:** You respect the human rights of the people you serve, advance principles of self-determination, and promote equitable relationships with all communities.
- **Commitment to Enhancing Community Capacity:** You help individuals and communities move toward self-sufficiency in order to promote the creation of opportunities and resources that support their autonomy.

INAPPROPRIATE CONDUCT AND HARMFUL BEHAVIORS

The following is a list of inappropriate conduct and harmful behaviors that are prohibited at all WALI Health laundromats. If a WALI Health facilitator engages in these or other actions that cause actual or potential harm to individuals within a community they serve, LWB US may report such wrongdoing to the appropriate authorities or take other disciplinary action.

- Failure to abide by the Hippocratic Oath: Such actions include but are not limited to causing physical harm, misdiagnosing health concerns with intention, ignoring or dismissing healthcare concerns.
- Discrimination or harassment in action or language based on race, color, sex, religion, national origin, age, disability, genetic information, sexual orientation, gender identity, gender expression, pregnancy, marital status, military status, veteran status, or any other status or classification protected by federal, state, or local law.
- Failure to address individuals by their chosen name and pronouns: Acknowledgment of an individuals chosen gender and sexuality is a key component of inclusivity and must be adhered to at all times even when addressing corporal medical concerns.
- Sexual harassment and/or sexual assault of any individual frequenting the WALI laundromat.
- Use, possession, or storage of any weapon or item that poses a potential hazard to the safety or health of others.

Additional behaviors that may result in disciplinary actions or investigation into wrongdoing:

- **An ambulance is called:** In general, ambulance fees are only paid for when the insurance company deems the ride "medically necessary." This leaves many individuals without the guarantee that their fee will be covered. Additionally, ambulance fees are astronomical, leaving those with no insurance a large debt to pay. Ambulances should only be called when absolutely medically necessary.
- **The police are called:** WALI sites are seen as community safe spaces. Given that lower-income black and brown people are disproportionately targeted at a higher rate by the police, they are not willingly invited to the site. Police should only be called when the situation deems it necessary.

CONSEQUENCES

WALI Health program partners, laundromat staff, and/or LWB US may choose to deliver the following consequences if health professionals or partnering organizations fail to uphold this Code of Conduct:

- **An investigation by WALI facilitators** with the intention of determining if termination of organizational partnership or individual participation is warranted.

CH. 21 OUR STANDARDS FOR PARTNERSHIP

PURPOSE

The goal of WALI Health Literacy is to train and prepare health professionals or community facilitators seeking to enter WALI sites and interact with community members. By training and preparing health professionals, Libraries Without Borders is actively working to mitigate the harm of the health industry that disproportionately affects lower-middle-income black and brown communities. The WALI site is upheld as a safe space within the community, so it is important that those that enter the space are aware of systemic issues and implicit biases in order to actively work against them when interacting with WALI users. This section outlines the specific requirements that are to be emphasized when initiating a partner into WALI Health Literacy programming.

REQUIREMENTS

The following elements are required from each prospective WALI Health partner organization in order to initiate any type of partnership.

Training

Training ensures that all health professionals are educated to the proper capacity about how to enter a WALI space as part of the medical community without inflicting harm

1. Must participate beforehand in the entirety of LWB training program including the pre and post assessments and have passed the metrics
2. Must require training from all health professionals who wish to enter the site before they do so

Organizational Background

It is important that any organization that wishes to partner with a WALI site remains clear and open about prior and present engagements in order to prevent any conflict of interest

1. The organization must not receive any undisclosed valuables from the pharmaceutical industry in the form of payments, grants, loans, or donations
2. The organization must disclose if it has partnered with the local police force on community initiatives in the present or past.
3. The organization must disclose if it has had any past interactions with Immigrations and Customs Enforcement
4. The organization must disclose if it has had any past interactions with Immigrations and Customs Enforcement

Respectful Conduct

WALI Health partners serve as positive examples of what the health system could and should be. This means that they are respectful in their interactions, garnering respect from the community they serve. Broad outlines for conduct are enumerated below. For a more detailed discussion, view the Code of Conduct section.

1. Follow the Hippocrates Oath of “Do No Harm”
2. Respectful in their interactions with community members and programming partners, treating community members with dignity
3. Culturally and socially aware; The Health Literacy Training will provide a rubric for expectations about what should be known
4. Will listen first; see both the healthcare professional and the patient as producers of knowledge
5. Be inclusive and welcoming to all WALI site users
6. Correctly name and gender individuals, adhering to chosen pronouns
7. Acknowledge that WALI Health partners are not the ultimate health provider, or primary care physician, for each individual and direct individuals to seek help when

SHARED VALUES

WALI Health partners are chosen because they believe that the medical industry disproportionately harms lower-income Black and brown communities. Partners decide to partner with WALI sites in order to mitigate this harm and provide healthcare for WALI users.

1. Partners believe it is important to help community members feel empowered rather than intimated by health topics
2. Acknowledges that each person is the expert on their own health and experiences
3. Promote health equity by encouraging individuals to be their own best advocates
4. Believe that WALI Health programming is a component that promotes community resilience and is a conduit to additional health resources

Anti-Discrimination Policy

WALI sites are inclusive community safe spaces for all individuals. Thus, the partnering organizations must be as well.

Each partner must have a discrimination or diversity policy or be willing to implement one. Such a policy serves to protect individuals from discrimination based on the following factors. If one or more factors are missing, the prospective partner must be willing to alter the existing policy for inclusion.

- Race
- Religion
- Class
- Weight
- Gender
- Sexuality
- Ability

ADDITIONAL RESOURCES

Your NNLM Regional Medical Library can offer many different resources to support programming, including funding and partnerships. For prospective programming partners, it may be valuable to share the email address of the RML leader of the region where their WALI is located. They can help to further advise on how to find partners and maintain strong partner relationships.

Consider applying for a funding award through your RML to offer programming at your WALI site. Reach out to your RMLs Engagement Coordinators for ideas and potential partners within their NNLM network they can connect you with. Regional RML leaders can further help advise on how to find partners and maintain strong partner relationships. For the email addresses and websites for each NNLM region, see Appendix 21.1.

CH. 22 DETERMINANTS OF HEALTH

DEFINING HEALTH

In order to understand what factors influence a person's health, it is imperative that we first define what health is. According to the WHO, health can be defined as ‘the state of complete physical, mental, and social well-being and not merely the absence of disease or infirmity. While that definition does acknowledge important aspects of health, we would like to expand it to include six different types of health: physical health, mental health, emotional health, social health, spiritual health, and environmental health.

Physical health refers to the state of your physical body and how well it is operating. It is influenced by levels of physical activity, adequate nutrition, rest, environments, etc.

Emotional health "focuses on being in tune with our emotions, vulnerability, and authenticity." Some ways that you can see good emotional health in action include: noticing upsetting emotions when they arise, catching your own self-judgments, and curiosity.

Social health can be defined as our ability to interact and form meaningful relationships with others. It also relates to how comfortably we can adapt to social situations. Signs that indicate a socially healthy individual include, but are not limited to: Having assertive skills rather than passive or aggressive ones, balancing your social and personal time, adapting in social situations, creating boundaries in friendships to encourage communication and conflict management, being engaged with other people in the community, and treating others with respect.

Spiritual health includes a purposeful life, transcendence, and actualization of different dimensions and capacities of human beings. It helps to create a balance between physical, psychological, and social aspects of human life. Some signs that a spiritually healthy individual may display include: developing a purpose in life, having the ability to spend reflective time alone, taking time to reflect on the meaning of events in life, having a clear sense of right and wrong, and acting accordingly.

Environmental health is the field of science that studies how the environment influences human health and disease. We will dive deeper into environmental health later on in this section.

Social Determinants of Health

As the previous section described, there are multiple aspects that play a role in the definition of health. Now that we have defined those aspects, it is now time to turn to another aspect of health: determinants of health. According to the Office of Disease Prevention and Health Promotion, there are five key determinants of health: economic stability, education access, and quality, healthcare access and quality, neighborhood and built environment, and social and community context.

Economic Stability

Economic Stability represents an individual's ability to access much-needed resources, such as food, adequate housing, and necessary healthcare. Income and health are strongly, positively correlated. In 2009, there was a study published by the Ulster Medical Society that reviewed the health implications after a financial crisis. The study noted, "extensive evidence that both unemployment and the fear of unemployment have adverse consequences for the health of individuals." This concept is best visualized through Maslow's Hierarchy of Needs, which details the order in which individuals accomplish their needs. The pyramid is read from the bottom up. According to this theory, individuals are motivated to accomplish a higher tier of the pyramid only after the previous tiers have been accomplished. Economic stability is tied to aspects of the bottom Physiological Needs tier, such as food, water, and clothing. Without economic stability, individuals are less able to achieve aspects in the second tier, Safety Needs, such as health.

Education and Health

There is a strong correlation between education and health. It is no surprise that individuals with higher levels of education tend to land jobs that are higher paying and lower risk. In addition, these positions tend to provide "health promoting benefits such as health insurance, paid leave, and retirement." However, the link does not end just there. On this same idea that individuals with higher education and better access to quality education tend to have a higher income, it is imperative to note that families and individuals of higher income are more likely to live in healthier neighborhoods. In the upcoming section, we will further discuss the effect of healthier neighborhoods vs less healthy neighborhoods, such as food swamps and food deserts.

Healthcare Access

"The National Academies of Sciences, Engineering, and Medicine define access to health as, 'timely use of personal health services to achieve the best possible health outcomes.' " With this definition in mind, it is expected that Healthcare Access is another determinant of health. The purpose of this paragraph, then, is to explain how exactly these two factors are connected. Access to healthcare services is usually achieved through three key steps: "gaining entry to the healthcare system, which is usually done through insurance coverage; accessing a location where healthcare services are provided; and finding a healthcare provider that the patient can trust and feel comfortable confiding in." Not having these needs met has an inevitable negative effect on health. Though there have been efforts made to provide insurance access to more individuals, it does not distract from the fact that "out-of-pocket medical care costs may lead individuals to delay or forgo needed care." This, in turn, opens up those individuals to a myriad of vulnerabilities that could have been prevented had they had access to affordable healthcare. However, it is important to acknowledge that sometimes insurance coverage is not enough. In rural regions, it can often be difficult to achieve timely health care due to physician shortages. In addition, access to culturally competent healthcare providers is crucial in receiving adequate healthcare. Patients need to feel comfortable communicating with their provider. This comfort stems from the provider's ability to relate and communicate with the patient.

Neighborhood and Built Environment

The next determinant of health is Neighborhood and Built Environment. Environment plays a significant role in the health of an individual. For the sake of cohesiveness, we will be focusing on the physical/geographic environment. In the next paragraph, we will discuss the role that the social environment plays in an individual's health.

Physical Environment

According to the Merriam-Webster Dictionary, the physical environment is the part of the human environment that includes purely physical factors, such as soil, climate, and water supply. However, I would like to expand this definition to include infrastructure and types of businesses in an environment. The connection between environment and health is best exemplified through factors such as food deserts and food swamps. According to a study conducted by the USDA, food deserts are areas where people have limited access to a variety of healthy and affordable food.

(Here are some helpful statistics for you to use to determine if your WALI site is in a food desert: In urban areas, at least 500 people or a third of the population must live more than 1 mile from the nearest large grocery store. In rural areas, at least 500 people or a third of the population must live more than 10 miles from the nearest large grocery store.)

Food swamps, on the other hand, are areas with a high density of establishments selling high-calorie fast food and junk food, relative to healthier food options. While these two concepts appear similar, the key difference between the two is that food swamps may have some healthy food options. However, fast food and other unhealthy food options greatly outnumber those healthy food options. This is significant because these unhealthy food options are oftentimes more convenient, barring the fact that they are already a more economically friendly option.

Lacking affordable and healthy food, being overwhelmed by an over-saturation of unhealthy food options, or being in an environment that has a combination of both situations inevitably affects the health of a community's members. Research has shown that living in an environment that lacks access to adequate food resources produces residents that have shown higher rates of diabetes, obesity, and cardiovascular disease. Ultimately, it is crucial that as a WALI Facilitator, you are sensitive to the effects that the environment has on overall health and lifestyle choices.

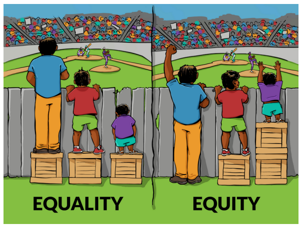
Social and Community Context

The final determinant of health is Social and Community Context. Specifically, this refers to the "social settings in which people live and act." The determinant is heavily influenced by an individual's social and cultural environments, respectively. The social environment is the environment developed by humans as contrasted with the natural environment; it can also refer to society as a whole, especially in its relation to the individual. The cultural environment, on the other hand, is the set of beliefs, practices, customs, and behaviors that are found to be common to everyone that is living within a certain population. Social connections, which are typically birthed by social and cultural environments, "are not only necessary for food, warmth, and other material resources, but also because they provide love, security, and other nonmaterial resources that are necessary for normal human development." In fact, not being able to have these resources addressed may have detrimental effects on an individual's life course, which inevitably affects their health. And so, it is no surprise then that a key aspect of social and community context is its interdependent relationship with social networks and social support. In a WALI space, a key way to ensure that this determinant of health is acknowledged is through the work of social workers. By definition, social work is "a practice-based profession and an academic discipline that promotes social change and development, social cohesion, and the empowerment and liberation of people." Social workers help to facilitate a positive influence of an individual's social and cultural environments.

A real-life WALI site example of social work is as follows: At the Baltimore WALI site, a father raising a teenage daughter could not afford menstrual products. The WALI team contacted a social worker and the social worker was able to provide the father with menstrual products within 45 minutes. In this example, social workers were able to provide the connection between a WALI patron's needs and the resources that a society holds, further developing social cohesion. Consequently, the role of social workers in WALI sites and in the social and community context determinant of health is invaluable, given how immersed social workers are in the communities they

HEALTH EQUITY

Before we discuss health equity, it is important to explain the difference between equality and equity because the two terms are very different. Equality has to do with giving everyone the same exact resources, while equity involves distributing resources based on the needs of the recipients.



With these definitions in mind, let us discuss health equity.

Health equity can be defined as "the state in which everyone has the opportunity to attain full health potential and no one is disadvantaged from achieving this potential because of social position or any other socially defined circumstance." The social determinants of health described above greatly contribute to an individual's level of health equity.

Health equity is important because every individual, regardless of their identity and background, deserves the opportunity to live a healthy life. Returning back to the explanation of equity and equality, it is important to keep in mind that health equity looks different for each individual because individuals have differing circumstances, ranging from their genetics to the neighborhood in which they reside.

CASE STUDIES

In this section, we highlight two organizations that are also taking a more holistic based approach to health. The first organization is Taller Salud. Taller Salud is a "community-based feminist organization that is dedicated to improving women's access to health care and to reducing violence within the community and to encourage economic growth through education and activism." You can read more about their mission and work at English.TallerSalud.com

The second organization is Health Leads. Similar to Taller Salud, Health Leads "works to connect communities to essential health resources like food, heat, and housing." You can read more about their work at HealthLeadsUSA.org

What Taller Salud and Health Leads are doing is acknowledging that there are external forces that contribute to an individual's quality of health. They aim to mediate those determinants, while also providing improved access to healthcare.
The other key thing that both of these organizations do is that they include the community in their efforts. It is not a disconnected relationship. For example, in Health Leads, they have enacted a program in which healthcare providers and the members of the community where they serve work together to tackle the issues that are affecting their community specifically.

At WALI sites, it is imperative that you remember that the work we are doing is to help communities. The only way to truly know what each community needs is to simply ask them. And after asking them, be sure to include the community members in the process of bringing these requests to fruition.

Thankfully, there are already programs like this in place in cities where WALI sites are located for you to reference, such as Healing City Baltimore in Baltimore, MD and Authority Health in Detroit, MI.

Health Equity

From this section, you have learned that health has many different forms, ranging from well-known physical health to environmental health. There are social factors, otherwise known as social determinants of health, that play a significant role in an individual's overall health. A lot of times, these determinants are not controlled by the individual. It is imperative that you remain sensitive to that. You have also learned about health equity, its significance, and how it differs from health equality. Finally, you have been provided with examples of other organizations, both in cities with WALI sites and cities without WALI sites, that have given you an insight as to the kind of holistic approach we expect you to take as you enter a WALI space.

FINAL WORDS

You can request free health information materials from the Network of the National Library of Medicine (Appendix 22.1). The NNLM consists of 7 Regional Medical Libraries (RML) that coordinate outreach and engagement activities with their region. You can order health information materials on materials such as MedlinePlus or to help promote opportunities for your community to actively participate in biomedical research studies, like the All of Us Research Program. Find your RML at nnlm.gov.

CH.23 COMMUNITY RESEARCH

WHAT IS COMMUNITY RESEARCH?

Community research is the process of identifying the strengths, needs, and challenges of a specified community. By assessing the community's needs, you will gain a better understanding of the area you want to serve — whether it's an entire city or a small neighborhood. You will learn about the community's resources, engage with community members and potentially develop new community partnerships.

Community research identifies areas for system improvement, strengthening local partnerships, and assuring that a strong system is in place for an effective response to day-to-day public health issues and public health emergencies.

Strengths-Based Approach

The **strengths-based approach to community research values the capacity, skills, knowledge, connections, and potential in individuals and communities**. People usually begin their work with communities by identifying problems and focusing on the weaknesses of communities. Unfortunately, this perspective reinforces the idea that "the problem" should be the focus of attention. This continual focus on "the problem" may lead to individuals feeling as if all they have are problems or communities believing that all they have are deficits.

In contrast, a strength-based approach fosters hope by shifting the focus from "what's wrong with us" to "what's right with us." It assumes that, even though there may be problems, sometimes very serious ones, there are also **untapped resources and capacities inherent in every individual, organization, or community which can be put into use to improve current conditions**.

Risks of Excessive Community Research

Research fatigue is the process or state in which individuals or groups tire of engaging in research or resist and avoid participation in any further research. Community partners often do not receive the final results of the needs assessment; factors such as time and resource constraints limit the quality of the research.

Successful partnerships exist when partners share a long-term social change perspective, agree about goals and strategies, have mutual trust and respect, and share power and resources.

WHY IS THIS RELEVANT FOR WALI HEALTH?

Where we live, learn, work, and play is critical to our well-being. People thrive in communities that are safe, inclusive, and provide opportunities for making healthy choices. Feeling secure in our homes and surroundings, and having access to neighborhood resources, such as libraries, contribute to physical environments that support well-being. Since WALI Health wants to promote health literacy in different communities, it is important for facilitators to understand the community they will be serving and the services and resources available to them. To access this information, we must engage with the community and prepare ourselves for working in community spaces like a laundromat.

Access to Community Services and Resources

Discovering and affirming these underutilized assets and untapped potential are hallmarks of an asset-based approach to community work. Practitioners working in this way have to work in collaboration - helping people to do things for themselves. In this way, people can become co-producers of support, not passive consumers of support.

WALI Facilitators can compile a spreadsheet of services in the community. You want to identify community-based organizations that are likely to be attuned to the current service array in a community to control community resources. Examples include nonprofit organizations, churches, community health centers, public libraries, and community association groups.
Here are some databases that will be helpful in your search:

Dial 211 for Essential Community Services: 211 is an excellent resource in accessing databases of resources available from private and public health and human service agencies. Some examples of resources include basic human needs, mental health, and services in non-English languages. For more information, call 1-800-273-TALK (1-800-273-8255).

U.S Government's Health Data Initiative and Open Data Portal: The Open Data portal includes data sets of hospital locations, healthy corner stores, farmer's markets, community culinary and nutrition programs, crime incident reports, building code violations, and economic indicators. These sources of electronic data are publicly available and can be used to examine issues related to health and health equity and to inform the development of community-based solutions. You can find it at www.healthdata.gov

NNLM offers a series of popular evaluation guides that present step-by-step planning and evaluation methods. Along with providing information about evaluation, each booklet includes a case study and worksheets to assist with outreach planning. Find more about the guides under Appendix 23.1.

When organizing the services and resources, you must decide what information you want to gather about these services. You may want to include:

1. Name address, and phone number of the agency or organization
2. Days and hours of operation
3. Number of sites and locations
4. Proportion of clients served who reside in the community
5. Eligibility requirements

Resource recommendations: community action programs, youth programs, health and wellness centers, libraries, neighborhood centers, educational programs, food pantries, and rental assistance, mental health support, childcare, and emergency medical care organizations.

Here's a spreadsheet template for organizing this information. To view and make a copy of this tool, see the access link under Appendix 23.2.

Making a Research Plan

Before you start your research, it is important to plan your activities well. Careful planning will help you to produce more useful findings that can help WALI Health Literacy make better programs. You should plan so that you make sure you are involving a broad range of people in your research. A research plan also helps to guide your research work and get it done within the time required.

Each time you make a research plan you need to ask:

- Why am I doing this research?
- What information am I looking for?
- What methods are best suited to each research activity?
- Where will I carry out this research?
- Who will I involve in my research?
- What resources will I need?
- What risks could be involved in doing this research?
- How can I make the research results most useful to WALI Health Literacy?
- How can I make the research results most useful to my community?

Asking these questions will help to make sure that your research is useful and based on ethical research principles. Good planning is essential to good quality research. Every research plan will look different because each plan is based on different research aims and objectives. The selection of the best tools and the right participants is another part of the planning stage. Once you have written your research plan, you can conduct your research using and adapting the methods that you have chosen. If you later decide that you want to add other methods that are not in your plan, you can change the plan as required by the research situation.

First Name	Last Name	Email Address	Phone Number	Organization Type	Organization Name	Website URL	Position Title	Address	City	State	Zip	Comments
Ex: John	*Doe*	*johndoes@mail.com*	*123-456-7890*	*Community Outreach*	*City Outreach Program*	*www.cho.org*	*Program Coordina-tor*	*123 City Way*	*Cityville*	*XX*	*1234*	*N/A*

Community Engagement

Doing participatory research means doing research with the community rather than on the community. To do your research successfully, it is essential to actively involve and engage community members in both planning and conducting various research activities. This whole process should draw on the skills, experiences, and knowledge of a range of people and groups in your community. Facilitators should eventually gain useful information about doing their own research and evaluations.

If it's done well, community members should begin to see the value of taking part in the research activities since they are a learning process that can help to bring about increased community dialogue, empowerment, and change. If your research is done very well, it can contribute to social change in your community.

Tips for Engaging the Community and Building Rapport

- Always introduce yourself and your organization/affiliation. You also want to offer a clear invitation.
- Use a range of communication methods to tell different groups about your research activities. Use clear language and tell them about the benefits of the research to your community.
- Involve people who are passionate about change and community development. Such people should be able to help you identify research participants and interest them in taking part in the research. They will also help to generate enthusiasm for your research.
- Ask participants to introduce themselves. If participants do not know each other, ask them to say something about themselves and what they hope to gain from the activity. You could also ask a question such as: 'If you were not at this meeting, what would you probably be doing instead?'
- Aim to create a sense of community: Ask people to share responsibility for running the activity. Use people's names when you speak to them. Once you have created a sense of community and formed good relationships, everything should flow well.
- Check on missing voices. Ask participants to identify any people who are not present but could be affected by the issues discussed and any actions that you agree to take.
- Listen deeply and show respect and empathy. Encourage everyone to show respect for all opinions and ideas and to listen to each other carefully. Demonstrate a sense of caring and empathy for the problems and issues raised by participants and make eye contact with others. If you listen to others deeply it encourages trust and empathy and people are more likely to share their experiences freely and willingly.

Include some active and fun activities: Try to include at least some activities that people really enjoy and enable them to actively participate and have some fun. Include incentives and giveaways.

With the walk-through format, workshop facilitators will ask any and all laundromat patrons to participate. Clear communication about what is being asked, what the benefits are, and what will be done with the information is critical. Consider drafting a script and practicing with facilitators ahead of time. Keep in mind the tips of engaging with the community and building rapport.

Sample Template for Self-Introductions

(Greetings) _______________,

My name is ________. [State your role/position title] I want to invite you to participate in a research study. [State the purpose of the study and what the study involves doing].

Your participation is voluntary and you may withdraw from the study at any time. The study is anonymous. It does not require you to provide your name or any other identifying information. If you would like to participate, please read and complete the Informed Consent form.

Your participation in this study will be key to assisting [state how does this study helps the program and how their participation will be beneficial to the program].

RESEARCH ETHICS

Doing participatory research can be difficult and challenging. For this reason, you must be aware of the following important issues:

Explain yourself: Before doing any research activity you should tell people briefly but clearly:

- Why you are doing the research
- What you are trying to find out
- How you will use the information they give you.

Respect confidences: You must never tell people who are not involved in the research project what people from your community tell you.

Treating people sensitively: Some research activities may create strong emotions in the people who are involved. You and other people in the group may already have or may form close relationships. They must be treated sensitively.

Exploring sensitive issues: You must be prepared to explore sensitive issues in your research. You must respect other people's opinions and even if you disagree with them. You must understand other people's points of view and beliefs.

Never put people at risk: Reporting what people say and do can have real and serious consequences. You should think carefully about what could happen if others learn about what people said during your research activities. Our research is NOT more important than people's lives or livelihoods.

Never put yourself at risk: You must be aware of dangerous situations and you should not put yourself in danger.

Seek approval: If you attend a community meeting or event and want to use some of the outcomes from that meeting or event in your research reports, make sure that you have permission to do so.

Respecting anonymity: You must always ask participants if they are willing to have their names used in research reports or other documents.

You should create an Informed Consent form. It is a great way to provide sufficient information about your research to community members, in a language that is easily understood by them, so that they make the voluntary decision regarding "to" or "not to" participate in your community research. See the image below for sample language in a consent form, or see Appendix 23.3 to download a copy of your own.

INFORMED CONSENT FORM: Health Literacy Program

Purpose:
You are being asked to take part in a survey/interview. Before you decide to participate in this study, it is important that you understand why the research is being done and what it will involve. Please read the following information carefully. Please ask the facilitator if there is anything that is not clear or if you need more information.

The purpose of this survey/interview is to **[Briefly describe purpose.]**

Procedures:
[List all procedures here. Refer to Guidelines for more detailed instructions]

Risks and Benefits:
There are no known risks or discomforts associated with this assessment. If you feel uncomfortable with some questions in the questionnaire, you can stop at any time. There will be no direct benefit to you for your participation in this study. However, we hope that the

RESEARCH ETHICS

The rapid appraisal is a quick way to understand the social or health needs of a population. The outcome of this method is a neighborhood profile generated, which includes detailed needs and available resources, and suggestions for change. Here are some tools:

Participant Observation	• To understand what is happening in your community and how this affects yaour research findings • To understand the everyday lives of people • To record everything that is thought, said, heard, seen, and felt while doing your research work	• All the time • Write down your observations every day if possible • Also, write down your reflections after each research session
Group Interviews	• To generate discussion on a key topic related to the focus of your research • To identify barriers to information access and social change • To discuss ways of improving the health literacy programs	• Over a period of three months, you might aim to conduct about 12 group interviews. • Each group interview should last from one and a half to two hours
Community Mapping	• To help you understand where the important facilities are in a community and if they access them	• Use to generate discussion and participation when you conduct group interviews
Road Blocks	• To understand why people cannot get access to resources and services • To identify problems experienced by groups and solutions to those problems	• Use to generate discussion and participation when you conduct group interviews

For additional rapid appraisal methods, see https://www.betterevaluation.org/sites/default/files/TIPS-UsingRapidAppraisalMethods.pdf/

Research Goals

- You will learn more about the community context (types of information that best describes the community such as social demographics)
- You will identify issues that people in the community care about their health
- You will know how important these issues are to the community (e.g., perceived importance, consequences for the community)
- You can identify methods the group will use to listen to the community (e.g., listening sessions, public forums, interviews, concerns surveys, focus groups)
- Describe the evidence indicating whether the problem/goal should be a priority issue.

Potential questions to include in the assessment survey

- Asking of age, nativity status, race, ethnicity, and socioeconomic status plays a role in determining the needs of the community
- Describe and ask about the strengths and problems described by community members
- List health topics for participants to select in the survey
- Barriers or resistance to solving the problem or achieving the goal and how they can be minimized
- What resources and assets are available and how can the group tap into those resources to address the issue?
- What are some activities you want to be incorporated into the health literacy program?

From the information presented in this section, you can assess community strengths/gaps/dynamics to identify the health needs and priorities in the community. For additional information and resources, see the guidance for conducting assessments of community needs and resources, as outlined below.

Assessing Community Needs and Resources

- Describe the makeup and history of the community to provide a context within which to collect data on its current concerns.
  - Comment on the types of information that best describes the community (e.g., demographic, historical, political, civic participation, key leaders, past concerns, geographic, assets)
  - Describe the sources of information used (e.g., public records, local people, internet, maps, phone book, library, newspaper)
  - Comment on whether there are sufficient resources (e.g., time, personnel, resources) available to collect this information
  - Assess the quality of the information
  - Describe the strengths and problems you heard about

Describe what matters to people in the community, including a description of:
  - Issues that people in the community care about (e.g., safety, education, housing, health)
  - How important these issues are to the community (e.g., perceived importance, consequences for the community)
  - Methods the group will (did) use to listen to the community (e.g., listening sessions, public forums, interviews, concerns surveys, focus groups)
- Describe what matters to key stakeholders, including:
  - Who else cares about the issue (the stakeholders) and what do they care about?
  - What stakeholders want to know about the situation (e.g., who is affected, how many, what factors contribute to the problem)
  - Prioritized populations and subgroups that stakeholders intend to benefit from the effort
  - Methods you will (did) use to gather information (e.g., surveys, interviews)
- (For each candidate problem/goal) Describe the evidence indicating whether the problem/goal should be a priority issue, including:
  - The community-level indicators (e.g., rate of infant deaths or vehicle crashes) related to the issue
  - How frequently the problem (or related behavior) occurs (e.g., number of youth reporting alcohol use in the past 30 days)
  - How many people are affected by the problem and the severity of its effects
  - How feasible it is to address the issue
  - Possible impact and/or consequences of addressing the problem/goal
- Describe the barriers and resources for addressing the identified issue(s), including:
  - Barriers or resistance to solving the problem or achieving the goal (e.g., denial or discounting of the problem) and how they can be minimized (e.g., reframing the issue)
  - What resources and assets are available and how the group can tap into those resources to address the issue
  - Community context or situation that might make it easier or more difficult to address this issue
- (Based on the assessment) Select and state the priority issue (or issues) to be addressed by the group.

CH. 24 MEANINFUL INTERACTIONS

INTRODUCTION

Acknowledgement of the Space

Remember that your interactions will take place in a WALI laundromat. It is important to model inclusive language in a public space as well as constantly assessing your patient's comfort level. Additionally, remember that the WALI patron may just be passing through and is stopping at the laundromat to do laundry. They may not have time for a prolonged conversation. Be sure to acknowledge their needs and work with them so they walk away feeling good about their interaction.

Section Goals

The purpose of this section is to introduce facilitators to the realities of providing health literacy programming in laundromats — from getting to know the community they will be working into treating patrons with dignity and respect. Further, this section will introduce the importance of cultural competency in WALI interactions, as well as introduce specific conversation strategies and language tools to induce meaningful interactions with community members.

<u>Cultural competence</u>: The knowledge and interpersonal skills that allow providers to understand, appreciate, and work with individuals from cultures other than their own. These differences can take the form of race, ethnicity, gender identity, sexual orientation, language, religion, health literacy, income level, education, age, weight, physical ability, and more.

BEFORE WE BEGIN

This training will encompass proper terms and language that must be utilized when interacting in a WALI site. However, there must be a preface that addresses the ideas of language, inclusion, and political correctness. There is no such thing as "political correctness." Rather, the term has been used by those who deem the demand of inclusive language as "nitpicking" or "language policing." The use of inclusive language is the first step for marginalized communities to garner the respect and acceptance they deserve. Thus, inclusive language, which will be outlined in this training, must always be used at a WALI site. For more information, please visit "The truth about "political correctness" is that it doesn't really exist" by Amanda Taub, *Vox.com*.

Why Focus on the Dynamics of a "Good Interaction"?

The goal of Wash and Learn Initiative Health Literacy program is to provide community-based medical care for WALI site patrons. Historically, healthcare has disproportionately harmed Black, Indigenous, and people of color through medical interactions. The goal of this training is to mitigate all potential harms as well as to create a more knowledgeable environment for the healthcare professional and a beneficial experience for WALI Health Literacy Patrons.

Better Patient Outcomes

Culturally proficient health care uses a patient's language and culture as tools to improve outcomes for that individual. According to the Medical Care Research Review, when clinicians practice cultural competency techniques, there are clear benefits to clinician-patient relationships. This includes improved communication, increased trust, greater treatment efficacy, and an expanded understanding of patients' cultural behaviors and environment. Further, provider-patient communication is linked to patient satisfaction, adherence to medical instructions, and health outcomes.

Reduction of Harm

Culturally incompetent conversations can not only result in worse patient outcomes, but it can cause actual harm. They result in distrust between patients and providers and further exacerbate the systemic disparities in health care.

HOW CAN I FOSTER A WELCOMING ENVIRONMENT?

The Physical WALI Space

Refer to the *Making Your Laundromat a Welcoming Space* (page 19) and *Creating Programming for Your Community* (page 10) chapters.

Culturally Competent Communications

According to the National Center for Cultural Competence, cultural competence is achieved by identifying and understanding the needs and help-seeking behaviors of individuals and families.

*Table 1. How to initiate conversations with cultural competency **

Communication Task and Communication Strategy	Dialogue Example
Understand the patient's experiences • Report building/ask about the patient as a person • Invite curiosity • Assess how the patient interprets their condition	• Can you tell me about your life? Where were you born and raised? How has your experience been coming to a new country? • As your clinician, what would be helpful for me to know about you and your life? • What do you think has caused kidney problems?
Giving information • Assess for health knowledge • Ask what kinds of information are desired • Give information concisely without medical jargon and check for understanding	• What is your understanding of your condition? • Some people want to know everything about their medical condition, whereas others may not. What is your preference? • To ensure that I did a good job in giving you information, can you tell me what you will take away from this visit?
Determine patient involvement in medical decision-making • Assess decision-making preferences • Determine the patient's preferred decision maker	• How would you like decisions to be made about your health care? • Who is the person that you trust to make medical decisions if you were unable to?
Understand the patient's beliefs and values • Ask about what's important to the patient and their loved ones • Address spiritual concerns	• As we talk about how best to care for you, what are you hoping for? What concerns you the most? • Faith can be a source of strength. Can you tell me about your faith?
Address trust concerns • Be transparent; avoid judgement and defensiveness	• Some people are uncomfortable discussing their health with a clinician from a different background. Do you have any concerns in this regard? • When it comes to your health, have you ever felt that you have been treated unfairly?
Address resources/needs • Actively inquire about ways to support the patient and family • Actively assess for concerns about the plan	• What kinds of support would be helpful to you and your family? • What concerns do you have about this plan?

** Adapted from Edwina Brown et al., "Supportive Care: Communication Strategies to Improve Cultural Competence in Shared Decision Making," American Society of Nephrology, https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5053803/*

Language Tools

Race-Inclusive Language

"When basing our decisions to use or not use words, we empathize with communities that have experienced disparate harm to improve how we communicate for all." - Inuit, Abolish Racist Language (see contentdesign.inuit.com)

"Consider the necessity of using race within your text. Ask yourself: "Would I mention 'white student' or 'white faculty member' when discussing others?" - University of South Carolina Aiken, Diversity Initiatives Inclusive Language Guide

Instead of Using	Say
Alien, foreigners	**Immigrant, undocumented**; Do not use the word "illegal immigrant" or "illegal alien" to refer to individuals who are not U.S. citizens/permanent residents, who do not hold visas to reside in the U.S., or who havenot applied for official residency. • These words dehumanize the individual by stripping their identity down to legal status.
Indian	**Indigenous Person**
Minority	**Person of color, Multiracial**
African American	**Black**; Black and African American are not always interchangeable. Some individuals prefer the term black because they do not identify as African and/or American. • Individuals may identify as African, Afro-Caribbean, Afro-Latino, or other. • If referring to a group in general, use black (lowercase).
Oriental	**Asian, Asian American, Pacific Islander, Desi**
Mexican	**Hispanic, Latin(a/o), Latinx**; Hispanic refers to people from Spanish-speaking countries. • Latino, Latina, or Latinx (La-Teen-ex) is a person of Latin American descent who can be of any background or language. If the individual or group does not identify as either Latino or Latina, the gender-neutral term Latinx can be used. When referring to a group, generally use Latinx as it is gender inclusive.

Physically Inclusive Language

Instead of Using	Say
Crippled	**Person with a disability;** this language is person-centered
Differently-abled, handicapped, physically challenged, special needs	**A person with a disability;** the euphemisms on the other side of this chart are often considered condescending
Healthy, normal, able-bodied	**Non-disabled;** by using non-disabled, this word does not suggest that there is a clear line between what a person should or should not be
Wheelchair-bound	**Wheelchair user, person who uses a wheelchair**; this language is person centered

Instead of Using	Say
Homosexual, Fag, Homo	**LGBTQ(+)**; Shorthand or umbrella term for individuals who have a non-hetero/cis-normative gender or sexuality. LGBTQ stands for Lesbian, Gay, Bisexual, Transgender, and Queer. The '+' includes all other nonhetero/cis normative identities not included within the LGBTQ acronym.
Homosexual, Fag, Homo	**Queer;** An umbrella term to describe individuals who do not identify as straight and/or cisgender
Homosexual, Fag, Homo	**Gender Non-Conforming;** A gender identity label that indicates a person who identifies outside of the gender binary
Drag, Tranny, She-Male, He/She, It	**Transgender**; A gender description for someone who has transitioned (or is transitioning) from living as one gender to another

Instead of Using	Say
Mentally ill, crazy, insane, psycho, schizo	**Person with DSM diagnosis**
Bipolar person or "they're bipolar"	**Someone with bipolar disorder**
Down's, retarded, mentally disabled	**Person with Down syndrome**
Autistic person	**Person with autism**

Addiction Language

Instead of Using	Say
Addict	**Someone struggling with addiction**
Substance abuse	**Substance use disorder, people living with substance use disorder**
Alcoholic	**Someone with alcoholism, someone with an alcohol problem**
On the wagon, recovering addict	**In recovery**

Other Communication Strategies

Working with patients with lower health literacy, there are several specific strategies to include. Throughout your exchange:

- Use plain language (avoiding medical jargon)
- Use visual aids, including drawing diagrams on pen and paper, models
- Limit the amount of information and repeat it frequently, checking for patient understanding
- Use teach-back. Teach-back is a specific method to check for patient understanding by asking patients to use their own words to explain what they need to do to know/do for their health. For more information on how to utilize teach-back, view the Teach-Back Toolkit from TeachbackTraining.org

ADDITIONAL RESOURCES

See Section 6 of the Appendix, under 24.1 for additional resources.

CH. 25 HARM REDUCTION: GENDER AND SEXUALITY

BACKGROUND

Libraries Without Borders mandates that WALI Health Facilitators acknowledge individual's chosen pronouns in our Code of Conduct and Standards for Partnership. The specific reasons for this requirement are explained below as part of our Gender and Sexuality content. The goal of the Wash and Learn Initiative Health Literacy program is to provide community-based medical care for WALI site patrons. Follow the training to ensure a more inclusive and beneficial health care experience.

BEFORE WE BEGIN

There is no such thing as "political correctness." Rather, the term has been used by those who deem the demand of explicit inclusivity as "nitpicking." Understanding and acceptance of the large spectrum of gender and sexuality and how it is expressed in individuals is the first step for individuals to garner the respect and acceptance they deserve. Be aware of what constitutes active discrimination against all gender and sexuality identities and actively seek to dismantle this system within the WALI space.

Individual Reflection

Before reading the rest of this section, take time to consider the following discussion questions:

- When were you first aware of messages about your gender? Other individuals' gender? How did these realizations make you feel?
- What are the assumptions you make about gender —yours and other people's? What assumptions are made about you based on your gender and sex? What assumptions did your parent(s)/primary caregiver(s) make about you and others?
- How do other identities affect how you relate to your gender?

GENDER AND SEXAULITY TERNINOLOGY

***Identity*.** Identity is all about how an individual thinks about themselves. It is about how an individual internally interprets how one thinks about themselves and all the facets that makeup who they are.

***Sex*.** Sex refers to the biological differences between males and females such as genitalia and genetic differences. Genetic factors determine the sex of an individual by creating different genitalia as well as different levels of hormones. "The male/female split is often seen as binary, but this is not entirely true. Some men are born with two or three X chromosomes, just as some women are born with a Y chromosome."

***Gender*.** Gender denotes the social and cultural role of each sex in a society. Gender is a social construct that is influenced by the social environment and prescribes norms, roles, and relationships of women and men.

***Sexuality*.** Sexuality is the way people experience and express themselves sexually.

***Expression*.** Expression is different from both gender and sex assigned at birth. Expression encompasses a person's behavior and mannerisms. Historically, gender expression has been strictly prescribed and regulated by societal norms based on stereotypes. For example, only women were allowed to show femininity and avoid masculine duties or roles. Men were prized on their masculine aspects and were considered an aberration to society for showing or engaging with behaviors deemed "feminine." Today, we accept gender expression in any form from any individual.

Stop and Think: Why is knowing the difference between these terms important in the medical space? In a community space? In a WALI space?

Reflect: How do you identify in your gender and sexuality? How have these identities influenced your life?

Commit: Talk with a friend or family member about how you choose to express your gender and sexuality. Consider appearance, actions, language, prescribed roles etc.

CULTURE IN CLINIC

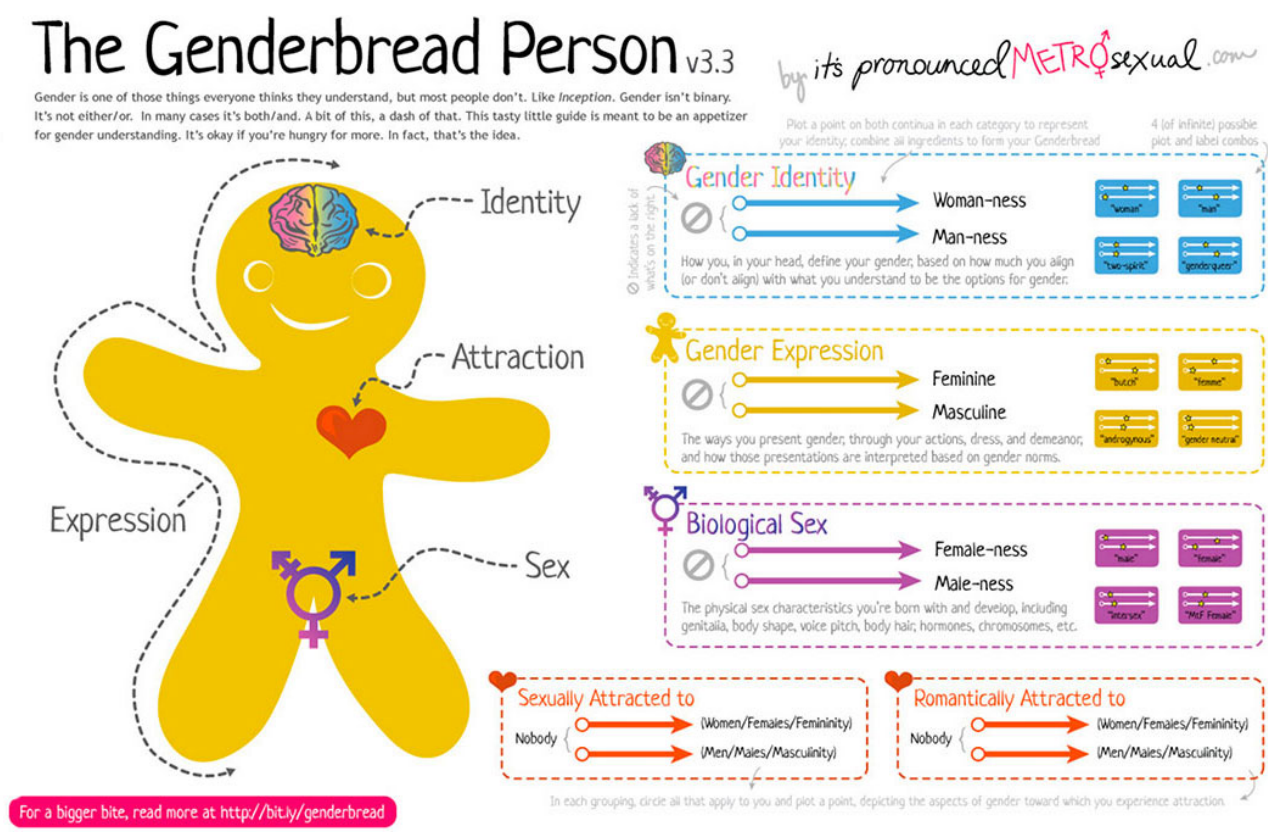
Heteronormativity describes the processes through which social institutions and social policies reinforce the belief that human beings fall into two distinct sex/gender categories: male/man and female/woman. This belief produces a correlative belief that those two sexes/genders exist in order to fulfill complementary roles. This term is the pervasive culture that makes heterosexuality and cisgender culture is seen as normal and any violation as deviant, strange, or unthinkable. Heteronormativity has affected healthcare in a variety of ways. It has made healthcare education fall along with a binary curriculum that fails to address the spectrum of different experiences and identities of gender and sexuality. It has also affected how healthcare professionals interact with their patients by prescribing a set of questions that assume heteronormative gender/sex roles and biology.

Stop and Think!: Name three different reasons why heteronormativity harms healthcare.

Reflect: What experiences have you had in a medical scenario that have been influenced by heteronormativity? Think of scenarios where you were the patient and where you were the healthcare professional.

Commit: Do further research into how heteronormativity has affected other areas of society such as the education system or the workplace.

GENDERBREAD PERSON



The Genderbread Person showcases that gender is not binary but rather a spectrum. This diagram covers gender and sexuality, which encompass five different areas: Gender Identity, Gender Expression, Biology, Sexual Attraction, and Romantic Attraction. Take a look at the Genderbread Person to gain a better understanding of all that encompasses gender and sexuality.

Stop and Think!: What are two ways that healthcare professionals can change their interactions with patients in order to acknowledge the five aspects of the Genderbread Person?

Reflect: Fill out the Genderbread Person and reflect on your own gender identity.

Commit: After applying the Genderbread Person to your own life, show this diagram to a friend or family member and explain the five different aspects.

GENDER THEORY TERMINOLOGY

Genderqueer/gender non-conforming describes an identity label sometimes claimed by people whose gender identity does not fit into either of the two culturally accepted gender categories. It may be characterized by the desire to challenge norms of gender role/presentation, to "play" with gender, and/or to express fluid gender identity.

Intersex. A group of medical diagnoses describing a person whose anatomy, physiology, and/or chromosome variation differs from cultural ideals of male and female in terms of external genitalia, internal genitalia, and/or hormone production levels. Intersex individuals are typically assigned as "male" or "female" at birth, and often undergo surgery on their genitals in infancy to force a more culturally acceptable gendered appearance. The intersex movement has challenged the ethics of infant genital surgeries that are not medically necessary, pointing out that many intersex people who undergo such surgery in infancy later report feeling a sense of loss of an essential aspect of themselves. About 2–4% of all births are intersex to some degree. This is sometimes not evident until puberty.

Asexuality. An individual who indicates a lack of sexual attraction, the lack of interest in and desire for sex, and/or the lack of a sexual orientation. Asexuals, while typically lacking in sexual desire, may engage in emotional, intimate, and/or romantic relationships. Each asexual person experiences things like relationships, attraction, and arousal somewhat differently. People with this identity sometimes use "ace" or "ace/sexual."

Stop and Think!: What are two ways that genderqueer/gender non-conforming, intersex, and/or asexual people are harmed by the healthcare system?

Reflect: Knowing that any new patient can identify as any of the above, how will you first interact with them in order to mitigate harm?

Commit: Explore this New York Public Library list of books by Trans, Nonbinary and GNC authors under Appendix 25.1. If one (or several) titles catch your eye, take time to read them and become more familiar with the topics.

CH. 26 HARM REDUCTION: RACE AND BIAS IN HEALTH

BACKGROUND

The goal of the Wash and Learn Initiative Health Literacy program is to provide community-based medical care for WALI site patrons. Historically, healthcare has disproportionately harmed Black, Indigenous, and people of color through medical interactions. The goal of this training is to mitigate all potential harms as well as to create a more knowledgeable environment for the healthcare professional and a beneficial experience for WALI Health Literacy Patrons.

TERMINOLOGY

"When basing our decisions to use or not use words, we empathize with communities that have experienced disparate harm to improve how we communicate for all." —Inuit, Abolish Racist Language

What is race?
Race describes a category of humankind that shares certain distinctive physical traits. For example, racial terms include Black, White, Asian, Hispanic, Pacific Islander, Indigenous.

What is ethnicity?
Ethnicity is more specific than race and is the state of belonging to a social group that has a common national or cultural tradition. For example, an individual's ethnicity can be Chinese, Nigerian, French, Indian, Canadian, etc. Ethnicity is a social description.

Stop and Think!: What are some experiences or identities that are central to who you are? How have they impacted how you see yourself or how others see you?

Reflect: What stereotypes do you associate with certain races? What stereotypes do you associate with certain ethnicities?

Commit: Talk with a friend or family member about how aspects of your identity (seen and unseen) have shaped your life.

WHITENESS IN HEALTHCARE

What is white supremacy?

White supremacy is the belief that white people are a superior race and therefore should dominate society, typically to the exclusion or harm of other racial and/or ethnic groups. White supremacy manifests in many different ways, some more explicit than others. Explicit white supremacy can be seen in racist remarks, negative attitudes designated towards nonwhite individuals or groups, symbols like the Nazi swastika, and mass demonstrations such as Charlottesville, Virginia in 2017. White supremacy is also ingrained in our societal systems and history and is less explicit than the previous examples. White supremacy is seen in our societal systems that unfairly advantage white populations at the expense of non-white populations. White supremacy can be seen in college admissions processes, the National Football League, and healthcare.

Whiteness

Being a culturally competent and aware healthcare professional requires an understanding of whiteness. Whiteness is a way to refer to "the way that white people, their customs, culture, and beliefs operate as the standard by which all other groups are compared."

Those that are not seen as white as seen as "other" or "unnatural," putting them at an unfair and arbitrary disadvantage. Whiteness operates in covert and overt ways that affect all individuals.

Stop and Think!: Using previous knowledge, name one way that Whiteness affected the healthcare system.

Reflect: What scenarios in your life has Whiteness affected you?

Commit: Look up the history of Whiteness and the United States at Whiteness, Talking About Race, Smithsonian National Museum of African American History and Culture (Appendix 26.1).

TERMINOLOGY

"Racial disparities in the health system should be understood within the context of racial inequities in societal institutions." Systematic discrimination is supported by policies and unconcious bias based on stereotypes. Non-white individuals receive a disproportionate amount of morbidity and mortality than white persons for most indicators of health. This reality is due to socio-economic systems of oppression such as economic disparities, less access to community services and resources, discrimination in the health care system, and history of racial oppression.

In 2015, the U.S. Department of Health and Human Services found that numerous examples of health inequity for non-white individuals:

- Lower life expectancy
  - Black individuals had a lower life expectancy than white individuals
- Higher blood pressure
  - Black individuals had a higher blood pressure than white individuals
- Lower rates of flu vaccination
  - Black and Latinx populations had a lower rate of vaccination compared to White and Asian populations
- Strain on mental health
  - The effects of racism was strongly associated with stress, anxiety, and depression for Asian and Latinx populations

"Racism also exists within healthcare itself and can lead doctors to neglect, disbelieve, or actively discriminate against patients."

Stop and Think!: Google Henrietta Lacks and her connection to HeLa cells. What lessons from medical school can you attribute to White supremacy?

Reflect: What oppressive social systems contribute to health inequities?

Commit: Write down one health inequity from the above list you would like to further explore after this section of training

UNCONCIOUS BIAS IN HEALTHCARE

Healthcare workers are not immune to unconscious bias. According to research, (1) health care providers hold stereotypes based on "patient race, class, sex, and other characteristics; (2) these stereotypes influence their interpretations of behaviors and symptoms and their clinical decisions; and (3) health care providers interact less effectively with minority than with white patients." The chart below demonstrates how a person categorizes every interaction according to their cultural influences. Though most healthcare professionals have good intentions, unconscious biases affect behavior. Being aware of how we are affected by unconscious biases allows us to be mindful and intentional in mitigating potentially harmful behaviors.

Figure 1: Georgetown University National Center for Cultural Competence

Stop and Think!: What is an unconscious bias you possess? How could that potentially affect your interactions with your WALI patients?

Reflect: What influences in your life have contributed to your unconscious biases? How can you educate yourself to mitigate these biases?

Commit: Follow through on your Reflection by doing a feasible action to mitigate a previously held bias.

Figure 1. Pathway of Unconscious Bias