

Toolkit Creation Guide

What Is a Toolkit?

A toolkit is a collection of authoritative and adaptable resources for front-line staff that enables them to learn about an issue and identify approaches for addressing them. Toolkits can help translate theory into practice, and typically target one issue or one audience.

Why Create a Toolkit?

Toolkits are meant to offer practical advice and guidance regarding an issue of concern or importance—especially when the issue is emerging or evolving, and well-established processes for addressing them are not yet widely adopted. Toolkits can also:

- Create efficiencies for library staff—individual staff don't have to recreate the wheel if a national group like YALSA has already gathered and shared the information they need
- Facilitate wide-spread adoption of a particular best practice or concept across the profession so that teens are better served

Steps to Creating a Toolkit

1. Identify the key audience(s) for the toolkit

It is probable that step #1 may have already been decided by the president or board, and if so, they would be stated in the charge of your work group. If not, check with your board liaison to confirm who the audience is.

- If one audience is public libraries, bear in mind that they vary greatly in size and capacity. According to the Institute of Museum and Library Services, over 7,000 of the nation's 17,000+ public libraries are small and/or rural, with an average staff size of 1.5 full time positions

2. Determine the scope of the toolkit

It is possible that step #2 may have already been decided by the president or board, and if so, they would be stated in the charge of your work group. If not, think about the audience and what their needs are. Also, strive to strike a balance between not enough information and too much information. You want to provide enough information so that the reader doesn't have to spend additional time researching the issue, but you don't want to provide so much information that the reader becomes overwhelmed or lost.

3. Come up with a strategy for collecting content (case studies, best practices, models, etc.)

For step 3, you have several options for collecting and creating content for use in the toolkit, and can use a single strategy or a combination of the following:

- Identify what already exists and that could be adapted or referenced. This strategy is useful when the topic covered is one that has been discussed by others quite a bit already. YALSA does not want to recreate the wheel, but instead wants to create tools that leverage resources already available and fills in gaps in what's available.

- Crowdsourcing resources from the library community - this is useful when the group working on the toolkit knows that the topic is one that many in the library community have experience with.
- Put out a call for resources to a particular audience - this is useful when there are those in other fields outside of libraries that might have resource of import and/or there isn't a lot known about what library staff are already doing in this area.
- Identify a select group of known experts and contact them for resource recommendations - this is useful when the topic covered is one that many in libraries may not already have experience with, and also when it is clear that there are a few leaders in this area in the field.
- Have the toolkit work group create/contribute any needed content - this is useful when the toolkit work group is made up of those with the most expertise on the area and/or when the group finds there isn't a lot available on the topic yet.

If it's determined that crowdsourcing, putting out a call, or contacting select experts is desirable, work with your group's staff liaison to identify the best method and tools for achieving this.

4. Vet the collected content

For step 4, materials should be evaluated with following criteria in mind. Content is:

- Relevant
- Current
- Reliable/authoritative
- Evidenced-based
- Easy to understand
- Adaptable
- Supports YALSA and ALA policies, guidelines, etc., including the YALSA Organizational Plan

Determine if there are any gaps in desired content. If so, either continue to seek resources to fill the gaps or identify someone to create them (this could be a group member or someone else who the group recruits).

5. Organize resources into a logical format, and create content as needed to build a cohesive document

- Create clear, intuitive headings and subheadings.
- Use bullet points to organize key ideas, organize key ideas and make text more scan-able.
- Stick to one idea per paragraph.
- Only include graphics or photos if they are highly relevant and enhance the text.
- Use only high quality images.
- Write introductions for sections, transitions, etc. that unify the content your group collected. Refer to Accepted Language/Terms on page 4.

A toolkit should include the following sections/elements

- I. Table of contents
- II. Introduction: introduce the issue and provide any relevant background
 - a. Describe the issue or challenge that is to be addressed
 - b. Explain why the issue is important and to whom it is important
 - c. Briefly reference relevant research or reports on the issue
 - d. Provide a case for why this issue is important to libraries
 - e. Articulate the benefits of adopting the activities in the toolkit, always keeping in mind that the materials need to be adapted for the needs of the teens in the local community
- III. Core: provide practical resources, information, suggestions, and tips for front line library staff. The core should provide multiple approaches to addressing an issue which are also adaptable to different situations. The core should include
 - f. Case studies / real world examples: illustrate how libraries are achieving this at the local level. Both success stories and challenges are instructive and useful to the reader
 - g. Known best practices
 - h. Emerging practices, if applicable
 - i. Resources and tools for all phases of a project, including planning, implementation, and assessment/evaluation
 - j. Relevant YALSA and ALA resources: be sure to conduct a search and identify any useful YALSA and ALA materials and integrate them or reference them in the toolkit. Staff can help with this, if needed
- IV. Annotated bibliography of resources: select current, authoritative and highly relevant resources, including but not limited to articles, books, webinars, podcasts, videos, web sites, reports, research, replicable materials, etc.
 - k. Be sure to include relevant YALSA and ALA resources. These could be guidelines, position papers, issue papers, blog posts, journal articles, books, wiki pages, on-demand webinars, web pages, events, and more.
 - l. Use the latest version of the *Chicago Manual of Style* for formatting citations

Optional sections

- Glossary: if enough of the toolkit's content may be unfamiliar to many library staff
- Appendices: relevant supplemental materials, such as reproducible forms or templates

6. Review the draft, refine as needed and submit to staff

- The YALSA Office just needs the content in an MS Word file. Staff will format the document by adding a cover sheet, page numbers, the logo, etc. Please also send along a list of names of individuals who worked on the toolkit, so they can be acknowledged.
- Please consider what you initially submit to be a draft. Staff will likely come back to you with questions, suggestions for improvement, etc.

7. Make further refinements, if requested by staff

Use Track Changes so it's easy for everyone to see what has changed from the first draft to the second. Common requested edits include

- Revisiting the document and changing language so that it meets the criteria set out in the Accepted Language/Terms section of this document
- Adding appropriate ALA and YALSA resources that were omitted or overlooked in the first draft
- Providing more detail. For example, instead of saying "organize a teen lock-in," providing additional information that include steps library staff would need to take in order to go about doing that
- Adding a section that has been omitted, such as information about outcomes and evaluation or a Table of Contents
- Adding links to web resources mentioned in the document
- Removing subjective information and opinions
- Removing long quotes that were lifted from another resource
- Reorganizing content in a more logical way
- Removing content that does not align with YALSA or ALA philosophies, guidelines, standards, etc.

8. Submit the final draft to staff for formatting and distribution

- Use Track Changes so it's easy for everyone to see what has changed from the first draft to the second.
- Submit the content in an MS Word file. Staff will format the document by adding a cover sheet, page numbers, the logo, etc.

Respecting Intellectual Property & Fair Use Compliance

When outside sources are mentioned or used, they must always be cited. In addition, factors determining fair use are:

1. The purpose and character of the use, including whether such use is of a commercial nature or is for nonprofit educational purposes
2. The nature of the copyrighted work
3. The amount and substantiality of the portion used in relation to the copyrighted work as a whole
4. The effect of the use upon the potential market for or value of the copyrighted work

Accepted Language/Terms

The goal is to ensure standardized language across all platforms, so be sure to follow these parameters:

- Use correct grammar and spelling. Strive for accuracy and clarity. Write about the topic so that someone who is unfamiliar with the issue can understand and absorb the information.

- Avoid acronyms or jargon. When using an acronym, spell out the term fully the first time and then use the abbreviation. For example, “YALSA’s Board of Directors met with a representative from ALA’s Budget Analysis and Review Committee (BARC). The BARC representative provided an update on new policies impacting division endowments.”
- Avoid subjective language and withhold opinions.
- Strive to be inclusive of different library types and use broad terms like “local libraries.” When speaking specifically about a library in a school, refer to it as a “school library,” not a media center, or a school library media center.
- Always represent someone’s name exactly as they have shared it with you. For example, if someone doesn’t capitalize a letter, or if they have an accent or a hyphen in their name, always include it when you retype it
- When talking about individuals aged 12 – 18, use the term teen or adolescent. When talking about individuals ages birth to 18, use the term youth. When talking about individuals ages birth – 11, use the term children.
- Always strive to be inclusive of all types of positions in libraries and use “librarians and library workers” or “library staff” versus just “librarians”
- In the few instances when speaking specifically about a librarian whose focus is teen services, use “teen services librarian” and not young adult librarian, YA librarian or teen librarian (the exception is a person’s job title. It should be accurately represented based on the information they supply)
- Per AASL, use “school librarian” and not school library media specialist, library media specialist, media specialist, or teacher librarian (the exception is a person’s job title. It should be accurately represented based on the information they supply)
- When referring to programs and services libraries offer in the summer months, use “summer learning” and not the narrower and increasingly outdated “summer reading.”
- Think carefully about “literacy” and what exactly you’re referring to. A more general term like “literacies” may be appropriate when taking a broad focus, but terms like trans literacy, multiple literacies, text-based literacies, digital literacy, media literacy, etc. could also be appropriate when speaking more specifically
- When talking about libraries or library staff and teens, always use the term “for and with.” For example, “YALSA empowers library staff to plan, implement and evaluation library programs for and with teens.”
- When talking about something happening with libraries, use “via libraries” or “through libraries” and not “in libraries” to convey the message that libraries are not just about the actual building
- When talking about readers’ advisory, place the apostrophe after the S

- Always refer to YALSA as an association, unless you're also specifically mentioning ALA and YALSA's relationship to ALA, in which case you can state "YALSA, a Division of ALA,..."
- Do not refer to YALSA as a not-for-profit or nonprofit, as technically we are not because we are not a legal entity. If you want to emphasize that we're a charitable organization, say "YALSA is a division of the American Library Association, a 501c3 charitable organization."
- Use "transgender" or "trans*" and not "transgendered."
- Use the phrase "collection development and content curation" instead of the narrower and more traditional "collection development"

Attribution/Ownership

The intent of YALSA/ALA, as the sole owner of this document, is to publish the finished document under a Creative Commons Attribution-Noncommercial-No Derivatives 4.0 International License. Work group members agree to assign to YALSA/ALA any ownership rights, including copyrights, in any work created by/for the work group and releases YALSA/ALA from any claims relating to YALSA/ALA's use of any such work. Additionally, YALSA/ALA will have right of first refusal to any work product resulting from the committee, as per ALA Policy Manual, Section 8.1.1.

Selected Resources

- View existing YALSA toolkits here:
www.ala.org/yalsa/professionaltools/handouts#toolkits
- YALSA Chair resources:
www.ala.org/yalsa/aboutyalsa/yalsahandbook#memchair
- YALSA's Organizational Plan: www.ala.org/yalsa/aboutyalsa/strategicplan

Thank you!

We greatly appreciate the time and talents you're lending to YALSA as a part of this project. If you have any questions as work on the toolkit progresses, please don't hesitate to contact your board or staff liaison.