



FY 2023–2026

Learning Agenda

Research Questions to Guide IMLS Priorities

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Pictured on cover (left to right):

LA County Library, Los Angeles, CA; Toledo Lucas County Public Library, Toledo, OH; The Franklin Institute, Philadelphia, PA

AGENCY FOUNDATION

The mission of the Institute of Museum and Library Services (IMLS) is to advance, support, and empower America's museums, libraries, and related organizations through grantmaking, research, and policy development. IMLS is the primary source of federal support for the nation's libraries and museums. As part of its mission, IMLS conducts policy research, evaluation, analysis, and data collection to extend and improve the nation's museum, library, and information services. IMLS is responsible for identifying trends and developments that may impact the need for and delivery of museum, library, and information services.

The Agency must report on the effectiveness of museum, library, and information services throughout the United States, including the impact of programs conducted with funds made available by IMLS. IMLS also must identify and disseminate evidence on the best practices of such programs. IMLS collects this data as authorized by its congressional mandate, the Museum and Library Services Act of 2018, as stated in 20 U.S.C. § 9108 (Policy research, data collection, analysis and modeling, evaluation, and dissemination).

The Agency carries out its charge as it adapts to the changing needs of our nation's museums and libraries and the communities they support. IMLS's mission is essential to helping these institutions navigate change by continuing to improve their services. IMLS envisions a nation where individuals and communities have better access to museums and libraries to learn from and be inspired by the trusted information, ideas, and stories they contain about our diverse natural and cultural heritage.

IMLS Strategic Goals and Objectives

IMLS has aligned its planning and focus for enabling grants to have their greatest impact on our communities to ensure Agency resources are focused on addressing federal priorities and the evolving needs of America's communities. These strategic priorities are detailed in the IMLS 2022–2026 Strategic Plan with its goals and objectives shown in the figure below.

GOALS	OBJECTIVES
GOAL 1 Champion Lifelong Learning	Objective 1.1 Advance shared knowledge and learning opportunities for all.
	Objective 1.2 Support the training and professional development of the museum and library workforce.
GOAL 2 Strengthen Community Engagement	Objective 2.1 Promote inclusive engagement across diverse audiences.
	Objective 2.2 Support community collaboration and foster civic discourse.
GOAL 3 Advance Collections Stewardship and Access	Objective 3.1 Support collections care and management.
	Objective 3.2 Promote access to museum and library collections.
GOAL 4 Demonstrate Excellence in Public Service	Objective 4.1 Maximize public investments by cultivating a culture of planning, evaluation, and evidence-based practice.
	Objective 4.2 Increase the impact of IMLS through strategic engagement with public and private sector stakeholders.
	Objective 4.3 Increase the efficiency and effectiveness of Agency operations.
	Objective 4.4 Build a workplace culture that fosters respect and collaboration, promotes open and transparent communication, and embraces diversity, equity, and inclusion.

IMLS Learning and Evidence-Building Principles

The Foundations for Evidence-Based Policymaking Act of 2018 encourages all federal agencies to build and use evidence to support their missions and to improve their operations. IMLS's Office of Research and Evaluation (ORE) is leading the development of the Agency's first Learning Agenda in supporting this legislative intent. While not a CFO agency, IMLS has committed to developing this Learning Agenda in intentionally aligning its research and evaluation priorities with its strategic objectives.

ORE is uniquely qualified to lead the research activities for IMLS's Learning Agenda based on its office mission.

The Office of Research and Evaluation provides scientifically credible and administratively feasible analysis and advice through surveying, evaluation, monitoring, and research. These activities are intended to offer meaningful and timely evidence to enable others to understand and enhance the contributions of museums, archives, and libraries that in turn further the wellbeing of American communities.

To accomplish its mission, ORE oversees two surveys of the nation's public and state libraries that are nested within the federal statistical system. It also is preparing to introduce a new survey of the nation's museums into this federal statistical system by the end of IMLS's current strategic plan. Administering these statistical collections involves deploying multiple ways for diverse users to engage with the collected data and evidence—accessing raw data, utilizing online querying tools, examining a wide array of statistical tables, figures, and maps, and digesting the learnings contained in infographics, research briefs, and reports.

ORE also shepherds IMLS's active monitoring and program evaluation activities in supporting Agency grantmaking. These range from advancing data visualization techniques and performance measures to tracking trends and extends to more systematic investigations for evaluating grant programs at all phases of their lifecycles using a plethora of evaluation processes and methodologies.

ORE additionally spearheads IMLS endeavors in research about museums, archives, and libraries. These research undertakings incorporate applications of essential social scientific methods and theories to assess the capabilities of these cultural institutions and to examine their relationships and contributions to social wellbeing across American communities.

IMLS has devoted FY 23 to developing its first Learning Agenda after completing the Agency's new strategic plan in the prior fiscal year. To do so, ORE personnel have engaged with IMLS leadership to draft this new document. OMB and external audiences also have reviewed the document.

As will be detailed shortly below, IMLS's Learning Agenda is organized around actionable learnings to three research and evaluation priorities that tightly align with its new strategic plan. Where not enough is known, IMLS will develop new bases of evidence through systematic analysis and will encourage replication and expansion for national-level findings. IMLS uses many types of data and evidence and understands the necessity to develop and sustain robust research and other evidence-based activities to inform grantmaking and deliberations around ways to strengthen our nation's museums and libraries and the various communities they serve. In pursuing a plethora of research and evaluation endeavors, IMLS looks to synthesize and compare findings in examining ways that the library and museum sectors may be converging or not.

IMLS will use the following principles to guide its research and evidence-building activities:

- Adhering to rigorous scientific and data standards.
- Protecting the independence and objectivity of its evidence.
- Making findings from its evidence-building activities available and accessible.

IMLS Strategic Learning Priorities

As museums, libraries, archives, and the people and communities they serve continue to recover from the impact of the COVID-19 pandemic, IMLS is dedicated to helping them navigate the ever-changing environment and building a promising future. It supports the continuous efforts of these community anchor institutions to delight, enlighten, educate, and connect people from all walks of life across America.

IMLS's Learning Agenda embraces IMLS's Strategic Objective 4.1 that seeks to "maximize public investments by cultivating a culture of planning, evaluation, and evidence-based practice." It additionally focuses on generating actionable evidence around three key learning priorities. Each priority represents a unique focus area that aligns with other strategic objectives. Each strives to establish and advance credible, relevant, and actionable information to better meet the needs of our nation's museums and libraries and their communities, especially those in underserved locales.

1. Child Reading Literacy

- a. Strategic Objective 1.1—Advance shared knowledge and learning opportunities for all.

2. Future of Museums

- a. Strategic Objective 2.2—Support community collaboration and foster civic discourse.

3. Equity Grantmaking

- a. Strategic Objective 2.1—Promote inclusive engagement across diverse audiences.
- b. Strategic Objective 4.4—Build a workplace culture that fosters respect and collaboration, promotes open and transparent communication, and embraces diversity, equity, and inclusion.

1. Child Reading Literacy

American libraries and museums reach millions of children every year. As institutions that encourage curiosity and exploration, they play a powerful role in shaping children's early cognitive development. Libraries and museums can promote early learning at the community, state, and national levels and as part of interagency initiatives.

Over the years, IMLS has led targeted efforts to better understand and enhance the role and value of libraries to strengthen literacy within communities, including early childhood literacy and primary school-aged children. These efforts to foster children's literacy reflect the evolution of the Internet and related technologies. Such efforts include a 2010 partnership with the Campaign for Grade Level Reading and a 2013 study of Every Child Ready to Read. In 2014, the Campaign for Grade Level Reading was recognized for its efforts by the Pacesetters Partner award. Throughout the rest of the last decade, IMLS continued to engage with the nation's leading practitioners and researchers in and related to the library sector on this issue.

The COVID-19 pandemic substantially exacerbated literacy challenges; youth reading scores dropped precipitously and evidence emerged of the growing dependency on the Internet as a contributing factor.¹ In response, IMLS brought together about 100 national literacy experts to Washington, D.C., in March 2022 to discuss opportunities where local public libraries could potentially make a bigger difference in slowing, pausing, and/or reversing the trend of diminishing child reading proclivity.

Following that convening, IMLS invested in new research to continue to improve understanding of how libraries can improve youth engagement and love of reading. These research investments are creating a new body of evidence to share with public library leaders and national literacy experts including at a second national convening at New York Public Library in September 2023. This Learning Agenda topic builds on the learnings from these convenings by directing research around six learning questions:

¹ See, for instance, Maryanne Wolf, *Reader Come Home: The Reading Brain in a Digital World*; Hough, et al., "The Impact of the COVID-19 Pandemic on Students and Educational Systems: Critical Actions for Recovery and the Role of Research in the Years Ahead" (Stanford Graduate School of Education); and Dana Goldstein, "It's 'Alarming': Children are Severely Behind in Reading" (New York Times, March 8, 2022).

IMLS Key Learning Questions

Q1: What does it mean for a child to engage in reading?

Q2: What do libraries do to engage children in reading? What do they find as effective? What do they find as ineffective (or less impactful?) What community partnerships do they utilize, if any, during that process of engagement?

- » How important does physical location and architectural design factor into opportunities for libraries to aid childhood learning?

Q3: How has the relationship between libraries and families evolved regarding child reading opportunities? What has caused these changes, and are they seen as positive or negative?

Q4: How do schools, community-based institutions, museums and other cultural institutions, as well as any other important literacy-focused institutions engage children in reading? Where do libraries fit into this ecosystem? How do these other organizations perceive the role of libraries in promoting literacy? What practices do they perceive as effective? What other potential key partners should they need to work with in the future?

Q5: What equity factors influence engaged child reading?

Q6: What factors does IMLS need to consider if it should pursue impact-driven grantmaking with controlled experimentation in testing the effectiveness of the accumulating evidence on promising ways for engaging children in reading?

2. Future of Museums

Museum leaders have demonstrated resilience and an eagerness to build on lessons learned during the global COVID-19 pandemic—including reminders of the various roles that museums can play in times of crisis, as well as their importance in preserving our rich heritage and inviting all to share in their missions. These new and strengthened capacities have helped many respond to the national call to create new opportunities for dialogue and healing. These opportunities also have brought universal leadership and management concerns to the fore, including issues surrounding:

- Defining programmatic excellence for internal and external stakeholders
- Shepherding business models for financial stability
- Fostering potential partnerships
- Supporting service to communities
- Encouraging civic leadership and engagement

As the federal government's largest investor in museums' missions and capacity building, IMLS is uniquely positioned to serve as an equitable convener of museum leaders to discuss the future of this sector. These discussions have shaped IMLS deliberations with the nation's leading practitioners and researchers in and related to the future of museum sector. IMLS met with 100 of these leaders in March 2023 to discuss best practices. These deliberations informed these learning questions.

IMLS Key Learning Questions

Q1: How well do museums bridge divides in their communities to further social cohesion among different factions in their communities? What strategies do they utilize, and are they tracking measurable outcomes to assess the experience? If not, what barriers to measurement exist?

Q2: What key shifts have occurred in recent times that affect museum operations relating to: (1) revenue streams; (2) staffing and volunteers; (3) content and services offered; and (4) community engagement efforts/strategies?

Q3: How have climate change and other public emergencies impacted museums regarding their infrastructure, policies, operations, and collection preservation work? What do these imply about sustainability?

Q4: What opportunities exist for IMLS to help facilitate stronger networks for social scientists to engage with museum heads/practitioners for framing actionable research and program evaluations?

Q5: What factors does IMLS need to consider if it should pursue impact-driven grantmaking with controlled experimentation in testing the effectiveness of the accumulating evidence on promising practices around the future of the museum sector?

3. Equity Grantmaking

IMLS published its Equity Action Plan in April 2022 in response to the White House Executive Order (E.O.) 13985, which focuses on advancing racial equity and support for underserved communities. The Plan commits IMLS to identify and address barriers to equity across its grantmaking and contracting processes. A special focus is to examine how discretionary grant programs for museums and libraries address the requirements of the E.O. 13985.

Initial in-house research conducted by IMLS in 2021 and 2022 suggests that current data collection practices in its discretionary grant programs have inadequate information to assess how to more equitably direct Agency resources to reach historically underserved and underrepresented communities. Consequently, this Learning Agenda priority is for evaluating IMLS's discretionary grantmaking practices to better understand the horizontal and vertical equities associated with grant money and technical assistance on museums, libraries, and archives serving small and rural populations; Black, Indigenous, and people of color (BIPOC) populations; and high poverty areas. One intent of this assessment is to establish a new baseline for subsequently benchmarking future equity efforts in research, grantmaking, and policy.

IMLS Key Learning Questions

Q1: What changes to IMLS grantmaking administrative practices can best respond to equity-related concerns based on the evidence?

Q2: How can and should IMLS determine equitable distribution of funds to eligible applicants as well as the communities and populations benefiting from these entities' efforts?

Q3: What is the breakdown of the organizational-level population of libraries, museums, and other cultural institutions that can potentially apply for a grant within IMLS grant programs? What is the reach of these cultural institutions in serving different socioeconomic, cultural, and geographic groups?

Q4: What share of the population of museums, libraries, and other cultural institutions has never applied for an IMLS grant?

Q5: Among the share of the population that has applied for at least one IMLS grant, what are notable factors that distinguish those who received at least one award from those who only have been rejected?

Q6: Is there any evidence that points to the effectiveness of the sustainability of the grantmaking efforts in addressing various dimensions of equity?

Q7: What options can IMLS consider in improving its effectiveness to assess the equity of its future grantmaking, including potentially introducing controlled experimentation?

Enhanced Learning and Evidence-Building

IMLS's Learning Agenda aligns with the Foundations for Evidence-Based Policymaking Act of 2018 (Pub. L. 115- 435) and President Biden's 2021 Memorandum on Restoring Trust in Government Through Scientific Integrity and Evidence-Based Policymaking. It prioritizes accessing credible, actionable, and timely information about library and museum services and their contributions to furthering the quality of life across the nation. It builds on IMLS's core evidence-building activities in furthering IMLS's mission with three priority research and evaluation endeavors that relate directly to Agency strategic objectives. The Appendix offers more details about each priority.

Measuring Progress

The Learning Agenda's primary objective is to produce and share learnings based on credible research studies, statistical surveys, and program monitoring and evaluations. IMLS will implement the evidence-building activities in IMLS's three Learning Agenda priority focus areas over the remainder of IMLS's strategic plan from FY 24 through FY 26. To measure progress throughout this duration, IMLS will track multiple outputs and dissemination outcomes as part of its annual performance reporting to the White House.

IMLS will produce additional results separately for its Equity Action Plan in measuring progress in responding to White House Executive Order 13985. In doing so, this action plan likely will leverage evidence and learnings from the Learning Agenda's equity evaluation of IMLS discretionary grantmaking.

IMLS plans to devote time in FY 26 to self-evaluate the design and implementation of this first Agency Learning Agenda. These learnings are intended to inform development of the next IMLS Strategic Plan and accompanying Learning Agenda.



Pictured (left to right):

Center of Science and Industry (COSI), Columbus, OH; Anaheim Public Library, Anaheim, CA

APPENDIX

CHILD READING LITERACY

LEARNING QUESTION	BASELINE EVIDENCE (PARTIAL LIST)
<p>Q1: What does it mean for a child to engage in reading?</p> <ul style="list-style-type: none"> i. What is the sequence of events that lead to a child's willingness to read, to begin to read, to engage more fully in reading, and to continue to do so habitually? ii. How do we define and operationalize this at each such step? <p>Q2: What do libraries do to engage children in reading? What do they find as effective? What do they find as ineffective (or less impactful)? What community partnerships do they utilize, if any, during that process of engagement?</p> <ul style="list-style-type: none"> i. What are the potential ways that libraries can better contribute to enabling children to engage and continue to engage in reading? ii. Where successful best practices are found, how generalizable are they across diverse types of neighborhoods? What else do these best practices not address, and consequently what risks might exist in scaling up these identified best practices? iii. How much do these successful best practices relate to: <ul style="list-style-type: none"> » Investments in books and related reading content? In what ways does "engaged" reading change when content is accessed via book or online? How does this vary based on subject matter? » Investments in library workers and related personnel training? » Investments in partnerships with other community-based or educational organizations that support library reading efforts? » Investments with other entities enabling libraries to offer reading activities outside their brick and mortar building in going to where the children and families live? iv. How important does physical location and architectural design factor into opportunities for libraries to aid childhood learning? <p>Q3: How has the relationship between libraries and families changed for child reading opportunities? What has caused these changes, and are they seen as positive or negative?</p> <ul style="list-style-type: none"> i. How do children, their parents, and their other caregivers perceive libraries as places to go to for engaging in reading, and how does this correspond with how library workers perceive this relationship? 	<p>Wolf, Maryanne. 2018., Reader, Come Home: The Reading Brain in a Digital World. New York, NY: Harpers Collins.</p> <p>Public Library Association and Association for Library Service to Children, Every Child to Read.</p> <p>Amplify Education, Inc. 2022 (February). "Amid Academic Recovery in Classrooms Nationwide, Risks Remain for Youngest Students with Least Instructional Time during Critical Years."</p> <p>Campana, et al. 2022. "Access, Advocacy, and Impact: How Public Libraries Are Contributing to Educational Equity for Children and Families in Underserved Communities: Journal of Research in Childhood Education: Vol 36, No 4 (tandfonline.com)</p> <p>Chotiner, Isaac. 2022 (September 8). "Measuring the Pandemic's Devastating Effect on School Children." New Yorker.</p> <p>Durkin, K., M. Lipsey, et al. 2022. "Effects of a Statewide Pre-Kindergarten Program on Children's Achievement and Behavior through Sixth Grade." Developmental Psychology: 8(7), 1385.</p> <p>Fahle, Erin M, Thomas J. Kane, et al., 2023 (May). "School District and Community Factors Associated with Learning Loss During the COVID Pandemic." (Unclear publisher. Authors affiliated with Harvard University, Stanford University, and John Hopkins University.)</p> <p>Goldstein, Dana. "It's 'Alarming': Children are Severely Behind in Reading." (New York Times, March 8, 2022).</p> <p>Hanushek, Eric. 2023. "The Economic Cost of the Pandemic: State by State." Palo Alto, CA: Hoover Institution, Stanford University.</p> <p>Hough, et al., "The Impact of the COVID-19 Pandemic on Students and Educational Systems: Critical Actions for Recovery and the Role of Research in the Years Ahead" (Stanford Graduate School of Education).</p>

LEARNING QUESTION

Q4: How do schools, community-based institutions, and any other institutions engage children in reading, and where do libraries fit in to this ecosystem? How do these other organizations perceive the role of libraries in promoting literacy? What practices do they perceive as effective? What other potential key partners should they need to work with in the future?

- i. Has anything changed in school curriculums and practices that may be influencing children's willingness to read before and during the pandemic, including the use of Internet applications?
- ii. How have other professional fields engaged children and their families around reading activities? How have these fields approached their own research related to this topic (e.g., school-based learning and pediatric science)?
- iii. How do these other community-based and educational institutions perceive and engage with libraries around child reading efforts? How much do any such variations matter?
- iv. How can libraries better fit into this larger ecosystem for influencing children reading?

Q5: What equity factors influence engaged child reading?

- i. Are there observable variations between types of neighborhoods where children more actively engage in reading from those that do not? How much of these variations is explained by observable socioeconomic and cultural factors?
- ii. How much do any such observed differences relate to the presence of activity level of libraries, including:
 - » Funding?
 - » Institutional features of the libraries (e.g., personnel, content)?
 - » Relationships between libraries and other educational and community institutions engaging in child reading?
 - » Geographic proximity of library branches to homes?

Q6: What factors does IMLS need to consider if it should pursue impact-driven grantmaking with controlled experimentation in testing the effectiveness of the accumulating evidence on promising ways for engaging children in reading?

- i. What does the literature reveal about best practices within the federal and cultural sectors?
- ii. What statistical and other methodological concerns would IMLS need to address if it were to develop a controlled experiment for assessing impacts in potential new grantmaking around child reading?
- iii. What administrative concerns would IMLS need to address if it were to develop a controlled experiment for assessing impacts in potential grantmaking?

BASELINE EVIDENCE (PARTIAL LIST)

MacGillis, Alec. 2023 (June 19). <https://www.newyorker.com/magazine/2023/06/26/what-can-we-do-about-pandemic-related-learning-loss> "What Can We Do about Pandemic-Related Learning Loss?" *New Yorker*.

National Assessment of Educational Progress, U.S. Department of Education. 2022. "NAEP Long-Term Trend Assessment Results: Reading and Mathematics."

Additional published studies including those focused on engaged child reading in the home and the relationship of child reading and brain development.

IMLS grant reports of projects involving public libraries and child reading.

Feedback gathered from library leaders and researchers during the "Empower Readers, Empowering Citizens," March 2022 convening in Washington, DC, and follow-up virtual meetings in September 2022.

IMLS' Public Library Survey and State Library Administrative Agency biennial survey, U.S. Census, and U.S Department of Education statistical collections.

Current and Planned New Research

In progress: IMLS-commissioned study to the American Institutes of Research on best practices on child reading activities in public libraries. Expected public release in September 2023.

In progress: IMLS-commissioned study to the American Institutes of Research on child literacy and locality testing neighborhood-level influences. Expected public release in September 2023.

Planned: new IMLS-commissioned, multi-year independent third-party investigation, intended to answer the first four learning questions. Expected duration from September 2023 through March 2026.

LEARNING QUESTION	BASELINE EVIDENCE (PARTIAL LIST)
<p>iv. Based on learnings about methodological and administrative considerations, what would be feasible options for IMLS to consider for potential new grantmaking around child reading? What do these learnings reveal for applying to other potential IMLS grantmaking efforts?</p>	<p>Planned: new IMLS-commissioned, multi-year independent third-party investigation intended to research options for applying controlled experimentation to any potential new IMLS grantmaking initiatives around child reading. Expected duration from September 2024 through September 2026.</p>

FUTURE OF MUSEUMS

LEARNING QUESTION	BASELINE EVIDENCE (PARTIAL LIST)
<p>Q1: How well do museums bridge divides in their communities to further social cohesion among different factions in their communities? What strategies do they utilize, and are they tracking measurable outcomes to assess the experience? If not, what barriers to measurement exist?</p> <ul style="list-style-type: none"> i. In what ways did the pandemic advance or deter museum efforts to support community needs, particularly those related to enhancing civic engagement and promoting inclusivity? ii. What are the challenges museums encounter when they introduce Diversity Equity, Inclusion and Accessibility (DEIA) focused museum reforms? What are the community benefits when museums prioritize and advance DEIA initiatives? How can museums foster healthy discourse around these types of changes? iii. How have museums successfully navigated challenges to change resulting from the pandemic and recent political and societal tensions? What kinds of lessons from these successes can be shared with the entire field as “best practices”? 	<p>IMLS-commissioned independent study to the American Institutes of Research that synthesizes grey and secondary literature relating to selected topics including museum contributions to communities, and changes in museum models post-pandemic. Anticipated publication date: winter 2023.</p> <p>Additional information as available via the Children’s Museum Research Network.</p> <p>IMLS grant reports relating to museum capacity for engaging in their local communities. Expected synthesis of these records with publication date sometime in fall 2024.</p> <p>2023. Institute for Museum and Library Services. “Museum Leadership in Dynamic Times Convening,” Report on proceedings from IMLS’s hosted conference (March 2–3, 2023).</p>
<p>Q2: What key shifts have occurred in recent times that affect museum operations relating to: (1) revenue streams; (2) staffing and volunteers; (3) content and services offered; and (4) community engagement efforts/strategies?</p> <ul style="list-style-type: none"> i. How have revenue streams shifted across time and what are the opportunities for museums to balance funding strategies that attract all visitors while maintaining sustainability? How do ticketing, fundraising, and endowment models differ across generations? ii. How do museums effectively support the changing wants and needs of workers over time? What are the primary differences and what are the benefits and tradeoffs when investing in staffing model changes? iii. How do museums effectively plan for long-term changes to exhibits that meet all evolving community preferences while maintaining core or legacy projects? What are the successful models for long-term planning of collection and exhibit investments (e.g., changes in demand, changes in funder preferences, etc.)? iv. What are the differing community needs across time and in what ways are museums well-positioned to engage those communities and bridge generational, socioeconomic, or racial divides? 	<p>Current and Planned New Research</p> <p>In progress: IMLS planning and piloting for future annual data collection from the National Museum Survey. Pilot report and evaluation expected for public release in winter 2024.</p> <p>Planned: new IMLS-commissioned, multi-year independent third-party investigation to answer the Learning Agenda questions. Expected duration from September 2023 through March 2026.</p> <p>Planned: new IMLS-commissioned, multi-year independent investigation on options for applying controlled experimentation to new IMLS grantmaking initiatives around this Learning Agenda topic. Expected duration from September 2024 through September 2026.</p>

LEARNING QUESTION	BASELINE EVIDENCE (PARTIAL LIST)
<p>Q3: How have climate change and other public emergencies impacted museums regarding their infrastructure, policies, operations, and collection preservation work? What do these imply about sustainability?</p> <ul style="list-style-type: none"> i. How is climate change affecting infrastructure, policy, and operations and how does it exacerbate existing or generate new financial challenges for the field? What kinds of museums are most vulnerable to these types of external dynamics directly impacting their work? ii. What types of investments are most needed to help support museums as they navigate challenges brought about by changing climate and/or public emergencies? <p>Q4: What opportunities exist for IMLS to help facilitate stronger networks for social scientists to engage with museum heads/practitioners for framing actionable research and program evaluations?</p> <ul style="list-style-type: none"> i. What are the leading research needs and topics in the museum field and who are the practitioners most focused in these areas? ii. What types of funding are needed to support existing and advance long-term research efforts? iii. What types of networks and practices currently exist for museums and museum associations to enter into paid research and evaluation efforts? What seems to work well, what barriers exist, and what opportunities might exist for IMLS to increase efforts to facilitating and shepherding such conversations based on practices used in the museum and other sectors? <p>Q5: What factors does IMLS need to consider if it should pursue impact-driven grantmaking with controlled experimentation in testing the effectiveness of the accumulating evidence on promising practices around the future of the museum sector?</p>	

EQUITY GRANTMAKING

LEARNING QUESTION	BASELINE EVIDENCE (PARTIAL LIST)
<p>Q1: What changes to IMLS grantmaking administrative practices can best respond to equity-related concerns based on the evidence?</p> <ul style="list-style-type: none"> i. How has IMLS determined equitable distribution of funding in the past and what gaps or opportunities have been recognized from that analysis? ii. What policy and administrative-level changes accrued over time, such as modifications to application requirements in Notice of Funding Opportunities (NOFOs) or review criteria, have advanced and/or hindered equitable distribution of IMLS grant funds? What programmatic shifts (e.g., targeted programs, changes in reporting criteria, introduction of technical support) have advanced and/or hindered equitable distribution of IMLS grant funds? 	<p>White House Executive Order (E.O.) 13985 Executive Order on Further Advancing Racial Equity and Support for Underserved Communities Through The Federal Government The White House</p> <p>Urban Institute. 2021 (January). A Retrospective Evaluation of the [IMLS] Museum Grants for African American History and Culture.</p> <p>IMLS commissioned, in-house research by the Urban Institute, Assessing Equity in Grantmaking: Advancing Racial Equity and Support for Underserved Communities Through the Federal Government (2021).</p>

LEARNING QUESTION

Q2: How can and should IMLS determine equitable distribution of funds to eligible applicants as well as the communities and populations benefiting from these entities' efforts?

- i. In what ways would IMLS' determination of equitable distribution be similar or different than what is defined in E.O. 13985?
- ii. What is IMLS' capacity to support grantee efforts to collect and report on demographic data about the populations served? What data is currently available within grant records and what does this data tell us about the ways in which institutions serve or represent their respective communities? What are the gaps and opportunities to better understand data about demographic distribution?
- iii. What do IMLS personnel consider "equitable" as it relates to panelists and reviewers? In what ways do IMLS personnel determine and monitor "representation" of these individuals across the grant programs?
 - » What is the distribution of panelists and reviewers relative to the institution types eligible to receive funding?
 - » What else can IMLS do to effectively engage individuals from underrepresented groups to serve as panelists and reviewers?
 - » How do the characteristics used to profile reviewers correspond to profile of those applications selected for grantee project awards? In what ways would over or under-representation of a given institutional type of reviewers correspond with the selection of these project grant awards?
 - » What do the evaluation's findings about equity with the review processes used in the grant programs reveal about steps that IMLS can take to improve the selection of reviewers and the criteria used in evaluating grant applications for selecting project grant awards?

Q3: What is the breakdown of the organizational-level population of libraries, museums and other cultural institutions that can potentially apply for a grant across within IMLS grant programs? What is the reach of these cultural institutions in serving different socioeconomic, cultural, and geographic groups?

- i. What does "need" mean in the context of IMLS's mission and funding allowances/requirements? What does "need" mean in the context of how museums and libraries serve their communities and the populations served by them? How do these two meanings about "need" compare to each other?
- ii. In what ways does IMLS funding support or impede institutional-level delivery of services to populations in greatest need? Where can IMLS make reforms like improving grant administrative processes and funding mechanisms to better help institutions address needs of underserved populations?
- iii. What specific grant programs or IMLS' administrative activities (e.g., technical assistance) best meet the various dimensions of "need?"

BASELINE EVIDENCE (PARTIAL LIST)

IMLS Equity Action Plan. (April 2022). [Agency Equity Page](#) | Institute of Museum and Library Services (imls.gov)

Council on Environmental Quality, Climate and Economic Justice Screening Tool.

Other pertinent literature, including documents put out by OMB and federal interagency working groups.

Current and Planned Research

In progress: IMLS-commissioned independent evaluation by Kituwah of the Agency's four discretionary grant programs serving Native American and Native Hawaiian populations. Final evaluation report expected by spring 2024.

In progress: IMLS-commissioned independent evaluation by TCC Group of the Accelerating Promising Practices grant program for Office of Library Services. Final report expected by spring 2024.

In progress: IMLS-commissioned independent formative evaluation by Urban Institute of American Latino History and Culture (ALHC) grant program for IMLS's Office of Museum Services. Final evaluation report expected by winter 2024.

Planned: IMLS commissioned, multi-year independent evaluation of equity of IMLS discretionary grant programs based on the questions to this Learning Agenda topic. Expected duration of investigation from September 2023 through September 2026 with final report in fall 2026.

Planned: IMLS commissioned, multi-year, independent third-party investigation on options for applying controlled experimentation to new IMLS grantmaking initiatives related to equity issues being raised in this Learning Agenda topic. Expected duration of investigation from September 2024 through September 2026 with final report in fall 2026.

LEARNING QUESTION	BASELINE EVIDENCE (PARTIAL LIST)
<p><i>Q4: What share of the population of eligible museums, libraries, and other cultural institutions has never applied for an IMLS grant?</i></p> <ul style="list-style-type: none"> i. How does its makeup compare to those entities that have applied at least once and those that have applied multiple times? Are there any notable variations across IMLS grant programs? ii. How does its makeup compare to those entities that have received at least one award and those that have received multiple awards? iii. Are there any notable variations across IMLS grant programs? iv. What reasons explain why such institutions have never applied for an IMLS grant, and what does the evidence show about their validity? v. What do these findings reveal about any horizontal and/or vertical inequities? 	
<p><i>Q5: Among the share of the population that has applied for at least one IMLS grant, what are notable factors that distinguish those who received at least one award from those who only have been rejected?</i></p> <ul style="list-style-type: none"> i. What share of grantees who have applied and received funds to small grant programs for underserved groups have subsequently applied and received awards for larger IMLS grants? Are there observable characteristics that distinguish those entities which have applied for both small grant programs for underserved groups and large grants from those who have only participated in IMLS's small grant programs serving these underserved groups? ii. What do these findings reveal about any horizontal and/or vertical inequities? 	
<p><i>Q6: Is there any evidence that points to the effectiveness of the sustainability of the grantmaking efforts in addressing various dimensions of equity?</i></p> <ul style="list-style-type: none"> i. How effective have targeted, direct technical assistance efforts (e.g., peer mentorship, one-on-one assistance) been in matching to equity objectives compared to more standardized technical assistance efforts (e.g., application support presentations and webinars)? ii. How effective has IMLS been in conducting outreach to organizations with services to the populations matching the above-noted dimensions of equity? iii. What kinds of training and capacity-building within IMLS can support more equitable engagement efforts? Are there barriers or factors that challenge libraries and museums in underserved communities that impact their interaction with IMLS grant programs? iv. What kinds of benchmarks and assessment techniques would support more equitable engagement efforts? 	

LEARNING QUESTION	BASELINE EVIDENCE (PARTIAL LIST)
<p><i>Q7: What options can IMLS consider in improving its effectiveness to assess the equity of its future grantmaking, including potentially introducing controlled experimentation?</i></p> <ul style="list-style-type: none">i. What are the networks and/or conferences that draw organizations serving underserved groups that IMLS programs currently tap into? Are there networks and/or conferences that draw such organizations that IMLS has not yet tapped into?	