

## **Libraries and Veterans National Forum: Abstract**

The Texas A&M University Libraries is seeking an IMLS National Leadership Grants for Libraries National Forum Grant in the Lifelong Learning category in order to develop and facilitate a national conversation about library services for members of the veteran and military communities. These patrons can be found in virtually any library, and while they bring unique strengths to their communities, they also may experience unique challenges. Many libraries have not yet considered how they could support the special needs of veteran and military communities as a distinctive population. This project aims to bridge the gap between library services and the veteran community. There are three distinct goals for the project:

- Identify library workers from all types of libraries who are actively engaged in developing programming, services, collections, and spaces that serve the unique needs of veteran and military patrons,
- create a symposium that will bring together approximately 50 of these library workers to share ideas, strategies, and best practices for supporting veteran and military-affiliated patrons, and
- develop an online toolkit that libraries world-wide can use to better serve their veteran and military-affiliated patrons.

The timeline for the project will span two years from July 2019 through June 2021. Year One will include designing, planning, and hosting the Libraries and Veterans National Forum in June 2020 at the Texas A&M University Libraries. The symposium will be a two-day structured workshop with participant learning and an opportunity to contribute to professional practice. Participants will be asked to read the related literature prior to arriving and compile any documentation about their respective libraries' services to veterans. The first day of the symposium will involve programming, speakers, and workshops. The second day will focus on the work of facilitating the creation of content for the toolkit. Year Two of the grant will involve content development, marketing, and evaluation of the toolkit.

The project lead is a librarian and Army veteran who has garnered national attention for her work on library services for the military community. She is joined by two librarians who have family connections to the military and bring program management and web development skills, respectively. Additionally, the project team has added several collaborators who have experience working with veteran populations from other university, state, public, and school libraries.

The Libraries and Veterans National Forum has the potential to make broad national impact. By bringing together the leaders in library services for veteran and military-affiliated patrons together in a "think-tank" approach, the Forum will harness the knowledge of this leadership group in collaborative professional development. Not only will the Forum enhance the professional skills of attendees, but the creation of the toolkit will benefit the profession worldwide through the sharing of resources such as lesson plans, case studies, Forum presentation slides, bibliographies, service model documents, best practices, FAQs, links to resources, cultural competency resources, and the newly created ALA Veteran Caucus Membership Initiative Group contact information.

Forum participants will have the opportunity to disseminate information about the toolkit on national, regional, and local listservs, via social media, and at library conferences. The toolkit will reduce the barrier for libraries looking to begin offering services to the veteran population, but unsure of how to get started. The impact of the Forum and resulting toolkit has the potential to impact the future of veteran services in libraries for years to come.

## **Libraries and Veterans National Forum: Narrative**

### **Introduction**

The Texas A&M University Libraries is seeking an IMLS National Leadership Grants for Libraries National Forum Grant in the Lifelong Learning category of \$150,000 in order to hold a forum on the topic of libraries and veterans and develop a toolkit to support library workers developing services for members of the veteran and military communities. This grant also includes identified collaborators who are both librarians and military veterans from public, academic, state, and U.S. Department of Veterans Affairs (VA) libraries.

### **Statement of National Need**

The veteran and military communities, which include veterans, service members, and their families, are a population that can be found in virtually any library worldwide. Military families ease the difficulty of a parent's deployment by visiting library story time. Student veterans search for a place where they can study without distractions and find their home-away-from-home in the college library. Military families visit the public library to look for information and resources to support a veteran family member experiencing declining health. The availability of computers, the internet, and technology assistance through libraries is priceless to veterans of all ages, who visit libraries to search for information about veterans services and benefits or access military records. Children of veterans use school libraries for their ongoing education and recreational reading. These are only a few of the ways that members of the veteran and military communities use libraries every day.

Although virtually all libraries have veteran and military patrons, most libraries are only just beginning to identify this patron group and develop policies, services, and programming that meet the unique needs and strengths of the veteran and military communities and support lifelong learning (LeMire & Mulvihill, 2017). There is an opportunity for libraries to begin to capitalize upon burgeoning interest in supporting the veteran and military communities. Libraries are beginning to recognize that veteran and military-affiliated patrons need to be treated as a unique patron group. For example, in 2017, the Association of Research Libraries explored issues of equity, diversity, and inclusion in research libraries. Fewer than half of ARL directors described their libraries and the academic library community as equitable for veterans – lower than their perceptions for all other surveyed categories (Schonfeld & Sweeney, 2017, p. 24). Additionally, library workers are beginning to express interest in supporting their veteran and military-affiliated patrons. For example, the petition to create a Veteran Caucus Member Initiative Group within the American Library Association, led in part by the PI and collaborators in this grant proposal, garnered the requisite 100 signatures in less than 24 hours in July 2018. The petition was granted at the ALA Midwinter Meeting in January 2019 and the first library group dedicated to veteran services was established.

The Libraries and Veterans National Forum intends to capitalize upon the growing momentum to support veterans in libraries by providing a space for library workers from all types of libraries to come together and share their successes, their lessons learned, and best practices for working with the veteran and military communities. This builds on current and previous work in this area. First, this proposal builds on IMLS' own *Community Salute* initiative, including its forum in San Diego in 2016 (Brevard & Priestly, 2016). The five

*Supporting Veterans and Military Families* white papers that came out of the *Community Salute* initiative serve as a starting point for library workers who are interested in learning more about the veteran and military communities and getting their libraries started with understanding the unique needs of veterans. The Libraries and Veterans National Forum represents the next step toward comprehensive library support for the veteran and military communities. Using the *Community Salute* as a foundation, this Forum brings together library workers who have taken up the cause of working with the veteran and military communities to share their lessons learned and success stories.

The Forum also dovetails with the formation of ALA's newly formed Veteran Caucus, which aims to bring together library workers who are veteran or military-affiliated and library workers who work with the veteran and military communities. The PI is the founder of the Veteran Caucus and several collaborators are members of the Veteran Caucus leadership team. The Veterans Forum serves as a unique opportunity to bring together the library workers engaged in shaping the future of library services for veterans regardless of their type of library, affiliation with professional library organizations, or travel budgets.

The Forum will conclude with the creation of an online toolkit for library workers to use in their programming for veteran and military-affiliated patrons. This toolkit presents an opportunity for Forum attendees to build upon the *Supporting Veterans and Military Families* white papers by sharing programming ideas, marketing materials, best practice documents, collection development policies, and services descriptions for adoption and usage by library workers worldwide. Furthermore, this toolkit presents an opportunity to extend the Forum's learning far beyond the attendees to library workers who have never thought about their library's services to veterans, who are just getting started, or who want to build on their current programming.

The Libraries and Veterans National Forum supports both the National Leadership Grants for Libraries Program and its Lifelong Learning category. The National Leadership Grants for Libraries program "enhance[s] the quality of library and archives services nationwide by advancing theory and practice" (IMLS). The Libraries and Veterans National Forum aligns with this vision as a professional development opportunity for library workers engaging in work with the veteran and military communities, and it is aimed at enhancing library workers' knowledge, skills, and abilities in developing programming, services, and collections that both fulfill the needs and enhance the strengths of the veteran and military communities. The Libraries and Veterans National Forum further aligns with the Lifelong Learning category of the program through its focus on supporting the lifelong learning of patrons from the veteran and military communities. These patrons range in age from the young children of veterans and service members to World War II veterans and their family members. Their needs truly meet the definition of lifelong learning, as library support for these patrons ranges from storytimes for the children of deployed service members, to providing reference/research/resources on new communities as families transfer to new duty stations, to helping patrons find resources for burial of a loved one who served our country.

## **Project Design**

The Libraries and Veterans National Forum is intended to bring together library workers from many types of

libraries in order to further the conversation about how libraries can support members of the veteran and military communities. Specifically, the project has three goals:

1. Identify library workers from all types of libraries who are actively engaged in developing programming, services, collections, and spaces that serve the unique needs of veteran and military patrons,
2. create a symposium that will bring together approximately 50 of these library workers to share ideas, strategies, and best practices for supporting veteran and military-affiliated patrons, and
3. develop an online toolkit that libraries world-wide can use to better serve their veteran and military-affiliated patrons.

There are three primary assumptions that the project team is making in this project design. First is the assumption that many of the issues related to library support for veterans and service members span the boundaries of different library types. The project team feels comfortable making this assumption because they have experience working across library types in the past, particularly in the writing of the book *Serving Those Who Served*. While there is a risk that some library workers may find it difficult to relate to those who work at other library types, this is mitigated through programming such as panel programming and affinity groups that enables library workers to work with those with similar library backgrounds. The second assumption is that library workers currently engaged in work with veterans and service members will be able to populate a toolkit by the end of the Forum. This is an ambitious goal, certainly, but the project plan mitigates the risk that the toolkit will not be fully populated by extending the time for including content to the end of the grant funding period. Finally, the project team is making an assumption that there are at least 50 people working in this area of librarianship who would be willing to attend the Forum. The project team is confident that this risk is minimal, as recent publications and conference programs have garnered large attendance and overwhelming support. Indeed, there seems to be a groundswell of support for library work related to veteran support. The new Veterans Caucus Member Initiative Group gained over 140 signatures in just a few days. The project team expects that the attendance at the Forum will fill to capacity quickly.

#### *Leadership Team*

The Libraries and Veterans National Forum is led by three librarians at Texas A&M University. Sarah LeMire, the principal investigator and project lead, is the University Libraries' veteran liaison. An Army veteran herself, she has literally written the book on this topic, as coauthor of *Serving Those Who Served: Librarian's Guide to Working with Veteran and Military Communities* (LeMire & Mulvihill, 2017). Stephanie Graves, co-principal investigator, is an associate professor and Director of Learning and Outreach at the University Libraries, where she has substantial experience in pedagogy and event planning. She is also the daughter of an Army veteran. Elizabeth German, co-investigator, is an assistant professor and Service Design Librarian at the University Libraries. She has expertise in web development and content management systems, and she is a nationally-recognized expert in LibGuides. She is the spouse of a Navy veteran.

#### *Collaborators*

The audience for this project includes library workers from a wide variety of library types, including academic libraries, school libraries, public libraries, VA libraries, military libraries, and more. To ensure that the project

team is appropriately representing the perspectives, needs, and objectives of library workers from a variety of library types, the project includes a robust group of collaborators from a variety of library types. These collaborators, who represent school libraries, public libraries, state libraries, and academic libraries, are also themselves members of the veteran and military communities.

The following individuals are committed collaborators on the Libraries and Veterans National Forum project:

- Clancy Anderson, Military PLA Coordinator at Northeast State Community College, graduate student in the School for Information Sciences at the University of Tennessee – Knoxville, and Navy veteran
- Sarah Carnes, Clinical Librarian, Bedford VA Medical Center and Army veteran
- Tony Howard, Director of the Pickerington Public Library and Army veteran
- Dawn LaValle, Director of the Division of Library Development, Connecticut State Library and Marine Corps veteran
- Chris Magnusson, Regional Librarian - Automation Librarian, Arrowhead Library System and Marine Corps veteran
- Leah Mann, Library Media Services Instructional Specialist at Lewisville ISD and Air Force spouse
- Ingrid Ruffin, Assistant Professor and Interim Head of the Learning Commons, University of Tennessee, Knoxville Libraries and Air Force veteran

The project team has consulted with these collaborators on the proposal itself, and collaborators will be consulted on the design of the Forum and the associated toolkit by means of periodic meetings over the course of the project. The collaborators will play an important role in recruiting attendees for the Forum through their connections with their respective communities, professional organizations and networking connections. In addition, collaborators will be involved in reviewing participation and program proposals to ensure a diverse and balanced group of attendees and will also be involved in selecting speakers for the Forum. Letters of support from collaborators and other interested parties are included in supporting documents.

#### *Potential Participants*

The Forum is aimed at library workers currently provide programming and services to veteran and military-affiliated patrons. In order to fit into existing facilities, the audience will be limited to approximately 50 participants. Participants in the Libraries and Veterans National Forum will be library workers from a wide variety of library types, because members of the veteran and military communities can be found as patrons in many types of libraries.

To identify potential participants, the project team will disseminate a call for participation, a draft of which can be found in supporting documents. The project team and collaborators will disseminate the call for participation via a wide variety of venues in order to ensure that the call reaches a diverse pool of potential participants. At a minimum, the project team and collaborators will share the toolkit via popular library listservs, such as ACRL's Library Marketing and Outreach listserv, the Community and Junior College Library listserv, the Public Library Association listserv, and the Veteran Caucus' requested listserv. They will also disseminate the toolkit via the Chief Officers of State Library Agencies (COSLA) and popular state library listservs. Collaborators, who include library workers from school libraries, public

libraries, VA libraries, and state libraries, will also be encouraged to share the call for participation within their professional networks and professional communication avenues popular with their types of libraries.

In response to the call for participation, potential participants will be asked to write a statement of purpose for attending. Forum organizers will use the information to select library workers who will benefit from the Forum, add to the diversity of conversation, and contribute to the toolkit. In particular, participants will be selected based upon their experience working with the veteran and military communities in libraries and their potential contributions to the Forum and to the toolkit. Because the Forum will be building on the work of the IMLS *Community Salute* and other initiatives aimed at getting libraries started in this area, participants at the Forum are expected to have some experience holding programs, building collections, or developing services for members of the veteran and military communities in libraries. This prior experience is crucial to their ability to contribute meaningful content to the toolkit on the second day of the Forum.

In addition to the interest expressed by the Libraries and Veterans National Forum collaborators, the project team has also received word of interest from state libraries, library systems and libraries that have comprehensive veterans programs. Some of these organizations have provided letters of support for the project, which are included in the supporting documents section. They speak to the importance of creating a community of practice around library services to the veteran community. For example, Leesa M. Aiken from the South Carolina State Library states, “The purposeful intention of including various types of libraries to include school, public, military, and academic will provide an opportunity to understand the individual needs of veterans, military personnel, and their families in their preferred library space.”

## **Symposium Overview**

The Libraries and Veterans National Forum will be a two-day symposium held in the Texas A&M University Libraries. Texas A&M University is an ideal host for a few reasons. First, Texas A&M is located in the heart of Texas, which has the second-largest population of military veterans in the U.S. Texas A&M is also a Senior Military College and enrolls over 1,200 student veterans. Finally, the Texas A&M University Libraries has taken a leadership role in developing library programs, services, and policies for veterans.

### *Leading Up to the Symposium*

The planning phase of the project will begin as soon as the project is funded and will run concurrently with other phases the project. This phase includes logistics, facilities, travel, catering, calls for participation, and coordination of speakers. During this stage of the project, the project team will meet regularly with collaborators in order to disseminate the call for participation, select participants, identify speakers and presenters, and develop the program. The call for participation will include an optional call to present. The project team and collaborators will use the information to identify any potential speakers and programming amongst attendees. Additionally, they will call upon their collective knowledge to identify potential keynote speakers and programming. Preliminary ideas have included prominent individuals who research in this area, such as Dr. Lorie Roy, an ALA past president and recipient of the “Reaching Those Who Served” IMLS grant to recruit veterans into the library profession. During this same period, the project team will be finalizing logistics for the program. Facilities within Texas A&M University and the Libraries will be reserved for the

symposium, housing and travel arrangements will be finalized for attendees and speakers, and catering arrangements will be finalized. The project team will work in coordination with Texas A&M University-contracted catering and travel companies to facilitate these arrangements, under guidance from the Texas A&M University Libraries' business office. The project team will also hire administrative support in the form of a student worker who can help with logistics.

### *Symposium Format*

The Forum will be a two-day symposium that focuses both on learning and on developing content for sharing beyond the Forum.

Day 1: Day 1 will be focused on learning. Participants will gather in the morning for a keynote (speakers to be identified during the planning phases of the grant). This keynote will set the stage for a full day of sharing about success stories and lessons learned working with the veteran communities. The event will include multiple sessions, all of which will be aimed at the diverse audience. For example, the project team plans to invite members of Veteran Service Organizations (e.g. Student Veterans of America, Veterans of Foreign Wars, American Legion) for a panel about library partnerships. This type of panel is applicable to all library types, and would spark conversations about opportunities for collaboration across library types.

The project team will also create a call for participation in order to identify and feature library workers doing unique work to support the veteran and military communities in their libraries. As part of the call for participation, the project team will ask participants if they would be interested in doing a presentation, poster, or panel discussion as part of their attendance. From this initial expression of interest, the project team will identify potential presenters. Presenters and panelists will be selected with an eye toward broad interest, while poster presenters may focus more narrowly on a specific library type.

Day 1 will conclude with a dinner meeting on the Texas A&M University campus. This event is intended to extend the learning from the day's sessions. In order to extend the learning through the day, the dinner will also include a brief presentation from a keynote speaker, along with a facilitated discussion that asks attendees to share insights on their experiences and learning from Day 1 of the symposium. Attendees will converse, and in the process continue to build community and develop new insights into the day's content.

Day 2: Day 2 of the symposium will be focused on creating content for the toolkit. The day will kick off in the morning with a plenary session (speaker yet to be identified). Following this session, event participants will be divided into affinity groups based upon library type, e.g. public, academic, school, etc. By grouping librarians in these affinity groups, attendees will feel more comfortable sharing best practices for similar sized libraries, patron groups, and programs. These affinities (public libraries, academic libraries, school libraries, etc.) will also form the basic structure for the toolkit, so the affinity groups will have access to the areas of the toolkit to which they need to add content.

The project team will work with a facilitator to develop guided activities to structure the work of Day 2. First, affinity groups will be asked to reflect on their lessons learned and success stories working with veterans and military families. Attendees will be asked to share any documents that they have previously created related to veteran services and programming with their affinity groups. An analysis of the groups' current documentation

along with their reflections will create a gap analysis that will identify what types of content would be still need to be created for the toolkit. Next, affinity group members will be asked, individually or in small groups, to create documents that will be uploaded into the publicly-available toolkit. These documents will constitute building blocks for library programming, services, or collections for the veteran and military communities. For example, a public librarian who successfully held a panel of local veterans for Veterans' Day would write a how-to document for that event, including a planning timeline, budget, call for participation, and assessment strategies. Or an academic librarian who put together a book club for student veterans would include their book club outline, selected book, questions for discussion, and recruitment strategies. By the end of Day 2, symposium participants will have a robust start to a toolkit for veterans. Following the symposium, attendees will be encouraged to continue to add content to the toolkit, which will continue to accept contributions through the duration of the grant period.

Also during Day 2, participants will brainstorm strategies for disseminating the toolkit among the larger library community in order to ensure broad awareness and facilitate toolkit usage. The project team will disseminate the toolkit via common avenues such as major library listservs, but this diverse group of participants will be able to identify lesser-known strategies that are more effective strategies for reaching library workers from their library type. For instance, public librarians will be best equipped to identify communication avenues such as listservs, professional meetings, and organizations where the advertising the toolkit will be most successful. Academic librarians will be asked to think about communication strategies for their groups, and so forth for the other affinity groups.

Day 2 will conclude with programming that will bring the affinity groups together to share what they learned, what content they added, and what content gaps they identified for the toolkit. This mutual sharing provides a powerful insight into the state of library services for veterans at the end of the Forum. Identified content gaps in the toolkit serve as a call to action for the future directions of library workers striving to expand these services as a community of practice. Finally, the Day 2 will end with a recap from the project team and an initial assessment of the Forum.

## **Evaluation and Performance Measurement**

The Libraries and Veterans National Forum will include a multi-stage assessment plan. Prior to attendance at the Forum, attendees will be asked to complete a self-assessment reflecting on their familiarity with the veteran and military communities and their confidence in their ability to effectively engage with these communities. Following the Forum, attendees will be asked to complete the same self-assessment, enabling the project team to gauge how those self-perceptions have changed with additional familiarity and with the creation of the toolkit. The assessment at the end of the Forum will also include the four Lifelong Learning performance measurement statements for program/project participants.

Assessment will also continue after the Forum concludes. The project team will send a follow-up questionnaire six months after the Forum to ask participants to reflect on how they have used what they learned and to comment on how they have used the toolkit. The project team will also send out a broader survey to library listservs and other venues they used to disseminate the toolkit to ask library workers who have used the toolkit to comment on this usage. Due to the timing of the Forum, this follow-up activity will fall shortly after



Veterans Day, which the project team anticipates to be a period of heavy toolkit usage.

## **Toolkit**

The Forum deliverable will be a toolkit for library workers in all types of libraries. This toolkit will provide resources to help libraries get started working with the veteran and military communities. The toolkit will include resources such as lesson plans, case studies, presentation slides from the Forum, bibliographies, service model documents, best practices, FAQ, links to resources, cultural competency resources, and Veteran Caucus Membership Initiative Group contact information. In preparation for the Forum, event planners will contract with a graphic designer to help as they create a website that will house toolkit resources at the end of the event. Following the Forum, the project team will launch a robust marketing campaign to raise awareness of the toolkit and encourage usage.

The toolkit will be distributed through the SpringShare content management system, LibGuides. LibGuides is a multi-tenant host of individual systems that allows for the wide sharing and public distribution of content. Library workers from all types of libraries use LibGuides and many already have experience adding and using content from it. Therefore, using LibGuides to host the toolkit will make it easy for many library workers to add their own content and to copy or link to pages on their own institutional LibGuides sites. During the grant period, the project team will be able to assist library workers unfamiliar with LibGuides in adding their content to the toolkit. Links can also be created easily on public, school, regional, and statewide library system websites to expand toolkit access to all types of libraries.

The toolkit will utilize its own instance of LibGuides and create sub-websites within the instance. The toolkit will utilize features inherent with LibGuides such as subject classifications, content type, and tagging to facilitate the discovery of material. LibGuides has robust user management, allowing content creators to develop and present content in order to meet the objective or the resource. The publication workflow within LibGuides will allow the project team to implement a quality control mechanism for the content including checks for accessibility and best practices in writing for the web. LibGuides will also host the grant website.

A mock up is provided as a supporting document. The mockup illustrates the navigating for the grant website including, “home,” “toolkit,” “about,” and “contact.” There is then a row of three boxes. The first box allows the user to browse by subject, the second box allows to browse by type, and the third box is a search box. Below that there is a label “Major topics” and a three by three grid that gives sample topics including: storytime, career resources, diversity and inclusion, grants for veterans, LGBTQ+, entrepreneurship, support groups, services at a distance, and library school. Following that is an acknowledgement of IMLS funding of the project. Lastly, the footer contains last updated, the URL to the page, and an option to print the page.

Prior to the symposium, decisions will need to be made regarding the toolkit’s structure, such as the taxonomy for type and subject. These early decisions will help aid a successful launch of the toolkit following the symposium. However, some of the structure will be determined by participants at the forum, such as the major topics to help group content.

### *Content Creation and Validation*

While Day 2 of the symposium will focus on adding content to the toolkit, it is expected that many of the

symposium participants will wish to continue to add content following the symposium. The project team will facilitate the collection of content for the toolkit for the duration of the grant period. LibGuides provides an easy to use structure for participants to upload content, as well as embedded tools to validate links and other content. Additionally, library workers who were not a part of the symposium will have the opportunity to email content to the project team in order to contribute content to the toolkit for inclusion. Prior to release, all content in the toolkit will be validated by the project team and undergo accessibility testing prior to full release. Additionally, it is vital that the toolkit is a useful tool for library workers who have never worked with the veteran and military communities but wish to get started doing so. In order to test the validity of the toolkit, the project team will work with collaborators in school, academic, public and other library types to identify library workers who have no prior knowledge of library services for the veteran and military communities. This group will be asked to provide feedback on the toolkit's content and ease of use.

For the long term storage and access to materials, content will also be added to the Texas A&M University Libraries' institutional repository. The LibGuides toolkit will also be crawled by the Libraries' web archiving tool, Archive-It.

### *Dissemination*

The primary means that the project team will use for dissemination of content will be the toolkit, which will house content from Day 1 of the Forum as well as content developed during and after Day 2 of the Forum. Content created as a result of the forum will be licensed for broad reuse with a Creative Commons BY 4.0 License.

The project team and collaborators will share the toolkit via popular library listservs, such as ACRL's Library Marketing and Outreach listserv, the Community and Junior College Library listserv, the Public Library Association listserv, and the Veteran Caucus' requested listserv. They will also disseminate the toolkit via the Chief Officers of State Library Agencies (COSLA) and popular state library listservs. The project team will also engage attendees in dissemination of the toolkit. During Day 2 of the symposium, participants will engage strategies for effectively sharing the toolkit. This will help the project team uncover effective dissemination strategies for a wide variety of library types. The project team will also encourage participants who are interested in helping to disseminate the toolkit to sign up for a dissemination venue and to share the toolkit via that venue.

In addition to social media dissemination, the project team will also contract development of print collateral that can be shared at conferences and other in-person meetings to spread word about the toolkit and encourage its use by the library community.

Finally, the project team intends to share its findings with the library profession via presentations at conferences and publications in broadly-focused library journals such as *Reference & User Services Quarterly* or *Public Services Quarterly*.

### **Diversity Plan**

The Libraries and Veterans National Forum supports diversity in multiple ways. First, the program intends to include participants from a diverse group of libraries. Although libraries of all types are likely to have patrons

who are veterans, library literature about the veteran populations focuses heavily on academic libraries. This project aims to diversify the conversation about libraries and veterans by specifically including library workers from school libraries, public libraries, military libraries, and other types of libraries. Accordingly, collaborators have been identified who can represent the perspectives of a variety of library types. The project also aims to support diversity by highlighting the contributions of library workers from traditionally underrepresented groups and highlighting work that supports members of the veteran and military communities from traditionally underrepresented groups. The veteran and military communities are a diverse group. Therefore, library services, programs, and collections for this group must recognize the ways in which race and ethnicity, as well as other factors and identities, intersect with their experiences in libraries. Accordingly, in their call for participation in the Forum, project organizers will ask potential attendees if they identify as a member of a traditionally underrepresented group and if they have developed programming to serve veterans and service members from traditionally underrepresented groups in order to ensure that Forum attendance and programming are as diverse and inclusive as possible. To this end, the project team also seeks to continue to diversify its group of collaborators in order to ensure that a wide variety of experiences and perspectives are guiding the formation of the Forum and its toolkit.

### **National Impact**

The Libraries and Veterans National Forum has the potential to make broad national impact. First, bringing together a group of library workers actively engaged in work with the veteran and military communities has the potential to further develop a community of practice in this unique area. Dovetailing with the formation of the new Veterans Caucus Member Initiative Group in ALA, this community of practice has the potential to provide support for the library workers leading efforts in this area and to open up new avenues for collaboration. Next, the project has the potential to make broad impact through the creation and promotion of the toolkit. This toolkit, which will be made publicly available following the Forum, will be disseminated widely during the second year of the grant period. Following the end of the grant cycle, the project team intends to seek funding to keep the site active for at least another year. When funding is no longer available, the project team will seek a new sponsor for the project, such as ALA's Veteran Caucus Member Initiative Group, to take over regular maintenance and updates to the toolkit site.

### **References**

Attached as a supporting document.







## DIGITAL PRODUCT FORM

### Introduction

The Institute of Museum and Library Services (IMLS) is committed to expanding public access to federally funded digital products (e.g., digital content, resources, assets, software, and datasets). The products you create with IMLS funding require careful stewardship to protect and enhance their value, and they should be freely and readily available for use and re-use by libraries, archives, museums, and the public. Because technology is dynamic and because we do not want to inhibit innovation, we do not want to prescribe set standards and practices that could become quickly outdated. Instead, we ask that you answer questions that address specific aspects of creating and managing digital products. Like all components of your IMLS application, your answers will be used by IMLS staff and by expert peer reviewers to evaluate your application, and they will be important in determining whether your project will be funded.

### Instructions

All applications must include a Digital Product Form.

- Please check here if you have reviewed Parts I, II, III, and IV below and you have determined that your proposal does NOT involve the creation of digital products (i.e., digital content, resources, assets, software, or datasets). You must still submit this Digital Product Form with your proposal even if you check this box, because this Digital Product Form is a Required Document.

If you ARE creating digital products, you must provide answers to the questions in Part I. In addition, you must also complete at least one of the subsequent sections. If you intend to create or collect digital content, resources, or assets, complete Part II. If you intend to develop software, complete Part III. If you intend to create a dataset, complete Part IV.

### Part I: Intellectual Property Rights and Permissions

**A.1** What will be the intellectual property status of the digital products (content, resources, assets, software, or datasets) you intend to create? Who will hold the copyright(s)? How will you explain property rights and permissions to potential users (for example, by assigning a non-restrictive license such as BSD, GNU, MIT, or Creative Commons to the product)? Explain and justify your licensing selections.

**A.2** What ownership rights will your organization assert over the new digital products and what conditions will you impose on access and use? Explain and justify any terms of access and conditions of use and detail how you will notify potential users about relevant terms or conditions.

**A. 3** If you will create any products that may involve privacy concerns, require obtaining permissions or rights, or raise any cultural sensitivities, describe the issues and how you plan to address them.

## **Part II: Projects Creating or Collecting Digital Content, Resources, or Assets**

### **A. Creating or Collecting New Digital Content, Resources, or Assets**

**A.1** Describe the digital content, resources, or assets you will create or collect, the quantities of each type, and the format(s) you will use.

**A.2** List the equipment, software, and supplies that you will use to create the content, resources, or assets, or the name of the service provider that will perform the work.

**A.3** List all the digital file formats (e.g., XML, TIFF, MPEG) you plan to use, along with the relevant information about the appropriate quality standards (e.g., resolution, sampling rate, or pixel dimensions).

## **B. Workflow and Asset Maintenance/Preservation**

**B.1** Describe your quality control plan. How will you monitor and evaluate your workflow and products?

**B.2** Describe your plan for preserving and maintaining digital assets during and after the award period of performance. Your plan may address storage systems, shared repositories, technical documentation, migration planning, and commitment of organizational funding for these purposes. Please note: You may charge the federal award before closeout for the costs of publication or sharing of research results if the costs are not incurred during the period of performance of the federal award (see 2 C.F.R. § 200.461).

## **C. Metadata**

**C.1** Describe how you will produce any and all technical, descriptive, administrative, or preservation metadata. Specify which standards you will use for the metadata structure (e.g., MARC, Dublin Core, Encoded Archival Description, PBCore, PREMIS) and metadata content (e.g., thesauri).

**C.2** Explain your strategy for preserving and maintaining metadata created or collected during and after the award period of performance.



**C.3** Explain what metadata sharing and/or other strategies you will use to facilitate widespread discovery and use of the digital content, resources, or assets created during your project (e.g., an API [Application Programming Interface], contributions to a digital platform, or other ways you might enable batch queries and retrieval of metadata).

#### **D. Access and Use**

**D.1** Describe how you will make the digital content, resources, or assets available to the public. Include details such as the delivery strategy (e.g., openly available online, available to specified audiences) and underlying hardware/software platforms and infrastructure (e.g., specific digital repository software or leased services, accessibility via standard web browsers, requirements for special software tools in order to use the content).

**D.2** Provide the name(s) and URL(s) (Uniform Resource Locator) for any examples of previous digital content, resources, or assets your organization has created.

### **Part III. Projects Developing Software**

#### **A. General Information**

**A.1** Describe the software you intend to create, including a summary of the major functions it will perform and the intended primary audience(s) it will serve.

**A.2** List other existing software that wholly or partially performs the same functions, and explain how the software you intend to create is different, and justify why those differences are significant and necessary.

## **B. Technical Information**

**B.1** List the programming languages, platforms, software, or other applications you will use to create your software and explain why you chose them.

**B.2** Describe how the software you intend to create will extend or interoperate with relevant existing software.

**B.3** Describe any underlying additional software or system dependencies necessary to run the software you intend to create.

**B.4** Describe the processes you will use for development, documentation, and for maintaining and updating documentation for users of the software.

**B.5** Provide the name(s) and URL(s) for examples of any previous software your organization has created.

### **C. Access and Use**

**C.1** We expect applicants seeking federal funds for software to develop and release these products under open-source licenses to maximize access and promote reuse. What ownership rights will your organization assert over the software you intend to create, and what conditions will you impose on its access and use? Identify and explain the license under which you will release source code for the software you develop (e.g., BSD, GNU, or MIT software licenses). Explain and justify any prohibitive terms or conditions of use or access and detail how you will notify potential users about relevant terms and conditions.

**C.2** Describe how you will make the software and source code available to the public and/or its intended users.

**C.3** Identify where you will deposit the source code for the software you intend to develop:

Name of publicly accessible source code repository:

URL:

## **Part IV: Projects Creating Datasets**

**A.1** Identify the type of data you plan to collect or generate, and the purpose or intended use to which you expect it to be put. Describe the method(s) you will use and the approximate dates or intervals at which you will collect or generate it.

**A.2** Does the proposed data collection or research activity require approval by any internal review panel or institutional review board (IRB)? If so, has the proposed research activity been approved? If not, what is your plan for securing approval?

**A.3** Will you collect any personally identifiable information (PII), confidential information (e.g., trade secrets), or proprietary information? If so, detail the specific steps you will take to protect such information while you prepare the data files for public release (e.g., data anonymization, data suppression PII, or synthetic data).

**A.4** If you will collect additional documentation, such as consent agreements, along with the data, describe plans for preserving the documentation and ensuring that its relationship to the collected data is maintained.

**A.5** What methods will you use to collect or generate the data? Provide details about any technical requirements or dependencies that would be necessary for understanding, retrieving, displaying, or processing the dataset(s).

**A.6** What documentation (e.g., data documentation, codebooks) will you capture or create along with the dataset(s)? Where will the documentation be stored and in what format(s)? How will you permanently associate and manage the documentation with the dataset(s) it describes?

**A.7** What is your plan for archiving, managing, and disseminating data after the completion of the award-funded project?

**A.8** Identify where you will deposit the dataset(s):

Name of repository:

URL:

**A.9** When and how frequently will you review this data management plan? How will the implementation be monitored?