

## **ABSTRACT**

The Association for Library Service to Children (ALSC), a division of ALA, and the Association of Children's Museums (ACM) will convene a one-day *National Forum* attended by representatives from 12 children's museums, 12 libraries and up to 24 of their partnering organizations to distill a set of best practices from their exemplary work serving immigrants and refugees, compile the best practices resulting from the forum into a white paper, and broadly disseminate the best practices document to elevate these practices and encourage their adoption by libraries and children's museums to create more welcoming spaces for immigrants and refugees in their communities.

With this project, ALSC and ACM want to elevate effective practice as well as engage participants to identify and inspire new strategies that are replicable by children's museums and libraries. Access to libraries and children's museums can greatly improve the life outcomes of young children facing barriers to learning such as inequity, poverty, isolation, bullying, and institutionalized racism. ALSC and ACM seek to strengthen the capacity for libraries and children's museums to serve as community catalysts by encouraging members of each organization to learn from one another.

The project will consist of a planning phase from September 2019 to May 2020, a one-day in-person forum in June 2020, and post-forum information sharing from July 2020 to August 2021. The *Welcoming Spaces National Forum* will take place in Chicago just prior to the ALA Annual Conference in Chicago. Participants will be selected based on criteria developed by the project team with input from ALSC's Outreach to Underserved Children and Their Families Committee and The Office for Diversity, Literacy, and Outreach Services' Services to Refugees Immigrants and Displaced People Subcommittee. When selecting participants, care will be taken to maintain a balance of representation from children's museums and libraries, as well geographic location and service area type. The project team will give preference to applicants who propose to attend as part of a collaborative team that includes a community partner organization or a patron.

The estimated 94 participants of the *National Forum* will include representatives from children's museums (12), libraries (12), and collaborating partners (up to 24) that are doing exemplary work to engage with members of their communities who have recently immigrated or resettled. This may include patrons who have immigrated or sought refuge and desire to share their perspectives. The project team will also invite up to ten representatives from stakeholder organizations serving immigrants and refugees to attend the *Welcoming Spaces National Forum*, including Heartland Alliance, the Migration Policy Institute, and others.

ALSC will host a webinar in August 2020 to present preliminary findings. The project team will present at ALSC's 2020 National Institute in Minneapolis, MN (October 2020) and ALA's 2021 Midwinter Meeting in Indianapolis, IN (January 2021). The project team will continue direct communication with *National Forum* participants so that the final White Paper reflects their voices and experiences. The White Paper document will be presented to national audiences in a webinar in March 2021, at ACM's InterActivity conference in New Orleans (May 2021), ALA's Annual Conference in Chicago (June 2021), and via online platforms.

As a result of the *Welcoming Spaces National Forum* and White Paper, libraries and children's museums will gain an enhanced understanding of the challenges faced by immigrant and refugee populations and how to assist those community members. All resources developed as part of this project will be easily accessed online, downloadable, and organized in an easily printable format. The project team will format digital content with accessibility in mind.

## **STATEMENT OF NATIONAL NEED**

The Association for Library Service to Children (ALSC), a division of ALA, seeks a two-year \$150,000 grant to host a one-day *Welcoming Spaces National Forum* in Chicago with the Association of Children’s Museums (ACM) to compile a best practices resource for libraries and children’s museums serving people who have recently immigrated to or sought refuge in the United States. This project would directly fulfill the IMLS strategic objectives to “encourage library and museum professionals and institutions to share and adopt best practices and innovations” and to “promote the ability of museums and libraries to serve as trusted spaces for community engagement and dialogue.”

By using the term “Welcoming Spaces” ALSC and ACM hope to evoke an environment where anyone entering an unfamiliar museum or library setting receives both subtle and overt cues that their presence is welcome and that they may access the staff and resources therein. For example, the signage, displays and communication from staff should be welcoming and inviting for someone who may not speak English or is unfamiliar with available services. ALSC and ACM are aware that many potential immigrant and refugee patrons of libraries and children’s museums may be reluctant or fearful of accessing these institutions because of social marginalization. The *Welcoming Spaces National Forum* project will help document the efforts already occurring in libraries and children’s museums to welcome recent immigrants and refugees, including work within their facilities as well as outreach efforts to support immigrants’ integration into their new communities.

In 2017, 26% of the 70 million children under the age of 18 in the U.S. had at least one parent who immigrated to this country. Most of these children were born in the U.S., while 12% were born elsewhere.<sup>1</sup> Layered onto the usual provision of developmentally appropriate programming and resources for these children, must be an understanding that the experiences of children whose families have recently immigrated or sought refuge will necessitate an approach that honors the trauma the family has endured and accommodates their unique interdependence on each other.

With this proposal, ALSC and ACM seek to strengthen the capacity for libraries and children’s museums to serve as community catalysts by encouraging members of each organization to learn from one another. Through the *Welcoming Spaces National Forum*, ALSC and ACM aim to identify barriers to participation by the immigrant and refugee communities that lend themselves to scalable solutions.

Children’s museums are committed to welcoming all members of their communities, including recent immigrant and refugee families. In spring 2017, ACM’s 90 Days of Action campaign highlighted the work of more than 30 children’s museums with specific outreach programs or initiatives to welcome particular immigrant communities or to support awareness of inclusive

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<sup>1</sup> Zong, Jie, Batalova, Jeanne, and Burrows, Micayla Retrieved on 03/11/2019 from <https://www.migrationpolicy.org/article/frequently-requested-statistics-immigrants-and-immigration-united-states#Children>

practices for children and their families. ACM included the Long Island Children's Museum (NY) in the campaign, highlighting the Together to Kindergarten school readiness program for Spanish, Haitian-Creole, and French speaking African families. IMLS recognized Long Island Children's Museum with the National Medal for Museum Service particularly for this program, which started in 2006.

Other examples from the campaign include the Children's Museum of Houston's work with the Houston Public Library to establish Para los Niños, a family learning program that serves Spanish-speaking immigrant parents. Para los Niños includes eleven themed parent/child workshops that provide parents with resources, strategies and activities that improve family literacy and learning practices and parents' abilities to serve as their child's first teacher. Children's Discovery Museum of San Jose (CA) and The Magic House, St. Louis Children's Museum (MO) both host children's citizenship ceremonies for new U.S. citizens in addition to outreach programming to welcome immigrant communities to their museums. As part of a Race to the Top-Early Learning Challenge grant, Boston Children's Museum (MA) implemented a statewide strategy to bolster the capacity of museums and libraries to offer more support and resources for STEM activities, kindergarten readiness, early literacy programming, and participation in the state's Brain Building in Progress campaign. This work continues to this day through the Massachusetts Museums/Libraries Network, comprised of 56 libraries and 49 museums, and has several programming strands that focus on recent immigrant communities.

Children's librarians often find unconventional methods of meeting the needs of their patrons. This extends to their outreach practices. ALSC recognizes libraries who excel in providing outreach to the underserved with support from Candlewick Press through the Light the Way grant. The most recent recipient of this grant is New Carrollton Library in Prince George's County Maryland. The New Carrollton Branch was recognized for its outreach to mothers and children who were refugees from Afghanistan and other nearby countries. The families were living in a nearby community housing center and librarians provided early literacy materials to help the children and provided programming to help the families learn English. This is but one example of the many innovate ways children's librarians seek to make connections with those who have recently joined their communities from various countries.

With this proposed project, ALSC and ACM want to elevate effective practice as well as engage participants to identify and inspire new strategies that are replicable by children's museums and libraries. Access to libraries and children's museums can greatly improve the life outcomes of young children facing barriers to learning such as inequity, poverty, isolation, bullying, and institutionalized racism. Through the *Welcoming Spaces National Forum*, ALSC and ACM aim to identify current strategies and new approaches for participation that would lend themselves to replicable solutions to support recent immigrants and refugees.

This project will address the capacity building category by "enhancing methods for collaboration between libraries and stakeholders to address community needs and leverage community opportunities." Indeed, the purpose of the *Welcoming Spaces National Forum* is to encourage libraries and children's museums to pool their expertise to best serve their communities.

## **PROJECT DESIGN**

Through the *Welcoming Spaces National Forum* project, ALSC and ACM will meet the following goals:

- **Facilitate dialogue.** The project will provide an opportunity for those engaged with the question of how libraries and children’s museums welcome immigrant and refugee children and caregivers to reflect on current practice and collaboratively consider how to support these communities’ engagement with our organizations.
- **Improve practice.** The project will inform and improve practice in libraries and children’s museums. A key product of this project, the proceedings documented in the White Paper, will inform planning and decisions about institutional partnerships, activities, and resource allocation that will improve organizational engagement with immigrant and refugee communities.

At a more specific level, this proposed project will use the following tactics to meet the project goals:

- 1) Convene a one-day *National Forum* attended by representatives from 12 children’s museums, 12 libraries and up to 24 of their partnering organizations to distill a set of best practices from their exemplary work serving immigrants and refugees.
- 2) Compile the best practices resulting from the forum into a white paper.
- 3) Broadly disseminate the best practices document to elevate these practices and encourage their adoption by libraries and children’s museums to create more welcoming spaces for immigrants and refugees in their communities.

The *Welcoming Spaces National Forum* project will consist of three project components: the planning phase; a one-day, in-person *National Forum*; and post-Forum information sharing.

### Planning Phase September 2019 – May 2020

During the Planning Phase of the *Welcoming Spaces National Forum* project, ALSC and ACM will begin by convening an Advisory Panel comprised of library and museum staff as well as representatives from nonprofits that work on diversity and inclusion issues (See Key Project Staff and Advisory Panel, page 6). The Advisory Panel will meet virtually on a quarterly basis to provide input on all project components, including the conference content, the application and selection criteria for *National Forum* participants, and the resulting White Paper. Members of the Advisory Panel will receive an honorarium as well as a travel stipend to support their attendance at the *National Forum*.

Also during this Planning Phase, ALSC and ACM will gather data about current practices in libraries and children’s museums that help to welcome immigrant and refugee communities. In cooperation with the Advisory Panel, ALSC and ACM will develop a survey to distribute to

library and children's museum staff. Each organization will distribute to its own members, i.e., ALSC will communicate with library staff and ACM will communicate with children's museum staff. The project team will use the data collected to develop a list of key issues and topics that will inform the content of the *Welcoming Spaces National Forum*. The project team will also reach out stakeholder organizations to request input on the needs of their constituents and identify barriers to participation that may not be evident to library and children's museum staff.

Finally, the *Welcoming Spaces National Forum* will take place in Chicago in June 2020 on the Thursday leading into the ALA Annual Conference in Chicago. The project team will secure the forum venue and negotiate hotel rates for participants during the Planning Phase. The project team intentionally scheduled the *National Forum* adjacent to the ALA conference to leverage attendees' planned travel to Chicago for the Annual Conference. The project team will select a venue that is easily accessible by public transportation and will comfortably accommodate the estimated 94 total attendees, including library and museum participants, Advisory Panel, project staff, representatives from stakeholder organizations, and meeting facilitators for plenary and breakout sessions. The Literacenter in Chicago's West Loop is the preferred venue; a hotel affiliated with ALA's Annual Conference is the alternate location.

#### Welcoming Spaces National Forum - June 2020

The success of the *Welcoming Spaces National Forum* depends upon the knowledge and engagement of the participants. Invitees to the *National Forum* will include representatives from children's museums (12), libraries (12), and collaborating partners (up to 24) that are doing exemplary work to engage with members of their communities who have recently immigrated or resettled. The inclusion of partner organizations is to emphasize the understanding that children's museums and libraries need not be experts at all things related to serving every population. Ideally, by connecting with organizations whose very mission encompasses this, museums and libraries can amplify their impact.

Collaborating partners also may include patrons of libraries or children's museums who have immigrated or sought refuge and desire to share their perspectives. Patron participants will learn that their experiences are valued, and libraries and children's museums see them as a resource. Patrons would leave understanding that their perspective is one that helps children's museums and libraries serving children make meaningful changes to the way they conduct outreach and programming. The patrons will be identified by the museum, library or service organization with which they are connected.

The project team will develop an application process for selecting participants with input from the Advisory Panel as well as ALSC's Outreach to Underserved Children and Their Families Committee and The Office for Diversity, Literacy, and Outreach Services' Services to Refugees Immigrants and Displaced People Subcommittee. ALSC and ACM will promote the opportunity widely through available channels, such as social media, association blogs and journals, and direct outreach to members.

Based on existing efforts in children's museums and libraries, the project team assumes there will be ample interest in the topic of service to refugees and immigrants to build a robust bank of potential participants. However, securing time and/or approval to travel may prove challenging for some potential attendees. The project team will attempt to mitigate this risk by providing sufficient time between the invitation and the *Welcoming Spaces National Forum* to allow potential participants to reserve the time and request approval to attend if necessary. ALSC and ACM will not charge a registration fee to attend the *National Forum*.

When selecting participants, care will be taken to maintain a balance of representation from children's museums and libraries, as well geographic location and service area type. The project team will give preference to applicants who propose to attend as part of a collaborative team that includes a community partner organization or a patron. The project team will provide participants with materials to prepare for their participation in advance of the *National Forum* to maximize their ability to contribute to the event.

In addition to the participants described above, the project team will invite up to ten representatives from stakeholder organizations serving immigrants and refugees to attend the *Welcoming Spaces National Forum*. These organizations may include Heartland Alliance and the Migration Policy Institute, among others.

A skilled moderator, who the project team will identify during the Planning Phase, will guide the *National Forum*. During the welcome and opening session, participants will receive a preview of the day to come, participate in developing norms for the convening and be informed of the established code of conduct. The project team accepts the risk that discussions during the forum may touch on sensitive areas for some attendees and will use the beginning of the forum to set the norms of the convening and discuss a pre-developed code of conduct to ensure that all conversations are conducted a respectful way.

The one-day forum will begin with a motivating keynote speaker. The project team will seek a speaker who would be interested in sharing their personal experience having accessed a library or children's museum as a person who immigrated or sought refuge. The speaker will receive an honorarium and travel stipend.

Following the keynote speaker, attendees will separate into breakout sessions focused on issue areas and topics identified from member responses to surveys during the Planning Phase. Breakout sessions may include topics such as cultural humility training for staff, using visual signage to mitigate language barriers; placing world language collections in prominent locations; translating content in multiple languages based on community population data; or seeking strategic partnerships to leverage access to potential patrons and increase the ability to present programming and resources in multiple languages. The breakout sessions will use an "unconferenced" format, which will allow participants flexibility in how they discuss best practices as they pertain to their issue or topic.

**Narrative:** ALSC/ALA+ACM NLG-L, Welcoming Spaces National Forum  
National Forum Grant, Community Catalysts, Sept. 2019 - Aug. 2021

Following the breakout sessions, all participants will reconvene in a plenary session, where each smaller group will report to the larger group on their conversations. These reports will provide the basis for a preliminary list of best practices. The larger group will deliberate to refine this preliminary list and discuss next steps. The *Welcoming Spaces National Forum* will result a set of best practices, examples of success, and contact information of museums and libraries who wish to serve as peer resources.

Given the importance of these small and larger group conversations to meeting the project goals, the project team identified a risk that discussions could stray from the goal of identifying effective practices. To ensure that the sessions remain focused, the project team will identify facilitators for both the general and breakout sessions. The project team will also secure note takers to capture the proceedings. ALSC will contract with a writer to develop a best practices White Paper. ALSC typically contracts with an independent member writer to fulfill this role. Their travel will be supported to attend the Forum.

Post-Forum Information Sharing – July 2020 – August 2021

Following the *National Forum*, ALSC will host a webinar in August 2020, which will be promoted to members of ACM and ALSC, along with other librarians and children’s museums interested in learning about best practices for serving people who have recently immigrated or sought refuge. During this webinar, the project team will present the preliminary findings from the *Welcoming Spaces National Forum* and solicit input from the webinar participants.

The project team also will present these findings in conference presentations to encourage ongoing dialogue and feedback, including ALSC’s 2020 National Institute in Minneapolis, MN (October 2020) and ALA’s 2021 Midwinter Meeting in Indianapolis, IN (January 2021). Additionally, the project team will continue direct communication with *National Forum* participants so that the final White Paper reflects their voices and experiences.

The writer will use the compiled information to develop a White Paper with recommendations for broad dissemination. The White Paper document will be presented to national audiences virtually in a second webinar hosted by ALSC in March 2021, and in-person at ACM’s InterActivity conference in New Orleans (May 2021), ALA’s Annual Conference in Chicago (June 2021), and via online platforms. Select conference presentations will include invited *National Forum* participants as presenters.

## Evaluation

The external evaluation will be conducted by Garibay Group, which will provide formative feedback to the team as well as assess overall project outcomes. The evaluation will assess the extent to which the *National Forum*: a) fosters productive dialogue within and across the library/museum fields and surfaces best practices and emerging approaches to supporting immigrant and refugee families; b) facilitates connections between participating library and museum participating staff; and c) deepens participants' understanding of how libraries and museums can serve immigrant and refugee families. Evaluation will also gather feedback/recommendations from participants that can inform project activity in developing best practices. Two questions on IMLS performance measures will be included: "My organization is better prepared to provide a program or service that addresses community needs" and "My organization is better able to engage my community." Data will be gathered through a post-forum participant online survey and observation of forum activities.

Data will also be gathered at August 2020 webinar to inform future dissemination activities. Questions will focus on ideas gained, perceived usefulness of best practices, and suggestions for future planned webinars and dissemination activity. Data will also be gathered at the March 2021 webinar to assess key takeaways gained, perceived usefulness, and intent to act on ideas presented. For both webinars, data will be gathered through a post-session on-line survey.

Garibay Group will prepare a single, final report that will encompass findings from the *National Forum* and webinars.

## Key Project Staff & Advisory Panel

ALSC staff leading this project will include: Executive Director, Aimee Strittmatter as Project Administrator to provide strategic direction, financial oversight, and supervision; Deputy Director, Alena Rivers as Project Director to oversee communication efforts in coordination with staff, manage and supervise consultants, speakers, facilitators and evaluator, coordinate development of *National Forum* agenda with Advisory Panel, and develop materials with consultants; Program Officer, Projects & Partnerships, Angela Hubbard to coordinate advisory meetings, send materials, coordinate forum logistics, and process payments and invoices; Marketing/Membership Specialist, Elizabeth Serrano to coordinate outreach efforts, implement a communications plan, and design and maintain a project webpage; and Program Officer, Continuing Education, Kristen Figliuolo to assist with forum logistics and coordinate post-forum webinar.

ACM staff supporting this project will include: Executive Director, Laura Huerta Migus to provide strategic direction, financial oversight and supervision; Director, Field Services, Jennifer Rehkamp to coordinate outreach efforts; and Sr. Director, Professional Development, Victoria Garvin, to support development of conference and webinar content.



Cecelia Garibay will conduct evaluation of the project. Garibay Group is a nationally recognized audience research and consulting firm working on culturally responsive issues in informal learning environments. Cecilia Garibay, Principal, will lead her company's work on this project.

ALSC and ACM identified representatives from libraries, children's museums, and experts in diversity and inclusion efforts to serve on the Advisory Panel. An (\*) indicates confirmed participation.

Kathryn Jones\*

Boston Children's Museum

Kathryn Jones serves as the Senior Director, Community Engagement at Boston Children's Museum. She oversees the management and implementation of the School Readiness through Partnerships and Linking with Libraries: Opportunities for Early Learning through Family and Community Engagement projects. Both projects focus on statewide coalition and network building to support museums, libraries, and community organizations to provide high quality informal learning experiences across communities, including immigrant and refugee communities.

Jennifer Martin\*

Children's Discovery Museum of San Jose

Jennifer Martin served as the Director of Education and Strategic Initiatives for Children's Discovery Museum of San Jose for 21 years. In 2019, the museum established a separate department to operate its professional development initiative, the Cultural Competence Learning Institute (CCLI), and Ms. Martin now focuses exclusively on its continued development and delivery. With a graduate degree from Stanford University in Curriculum and Teacher Education and a career-long focus on community engagement and reaching and serving under-represented audiences, she is able to scale the CCLI framework to meet the unique needs of institutions across sectors.

Sonja Ervin

Multnomah County Library

Sonja Ervin is the Equity and Inclusion Manager of Multnomah County Library. The library offers a range of opportunities for immigrants and refugees to learn and practice English, participant in multilingual storytimes and access citizenship resources.

M. Michelle Cavanaugh\*

Prince George's County Library System

In her role as a Children's Services Librarian at the New Carrollton Library Branch, Michelle Cavanaugh and her colleagues provide outreach to the Parkview Gardens apartment regularly to serve the refugee women and their children. This includes providing a small collection of age appropriate materials for circulation, offering storytime and providing a play area to help children gain early literacy skills. The women also learn English by using Rosetta Stone on an iPad provided by the library. School-age children get homework help from mentors from the community. These services are well received by the refugee community.

Jason Driver & Erin Lovelace\*

Co-Chairs, ALSC Library Service to Underserved Children and Their Caregiver Committee  
Jason Driver is a librarian and Early Literacy Specialist with Chicago Public Library. Erin Lovelace is a Children's Supervisor at the Tuckahoe Area Library in Henrico, VA. Jason and Erin serve as Co-Chairs of ALSC's Library Service to Underserved Children and Their Caregiver Committee. In addition to patron advocacy, this committee's charge is to "offer leadership in discovering, developing, and disseminating information about library materials, programs, and facilities for underserved children and their caregivers; to develop and maintain guidelines for the selection of useful and relevant materials; and to discuss, develop, and suggest ways in which library education programs can prepare librarians to serve these children and their caregivers.

ALA Office for Diversity, Literacy, and Outreach Services (ODLOS)\*

The ALA Office for Diversity, Literacy and Outreach Services supports librarians and other library staff to create spaces that exemplify inclusion and respect for all community members. ODLOS approaches this work by decentering power and privilege and facilitating conversations around access and identity as they impact library staff and patrons. ODLOS employs a social justice framework to inform library and information science workers' development of resources. ODLOS liaises with five committees, four ALA roundtables, and eight ALA affiliate organizations whose members span a broad representation of diversity.

The budget request of \$150,000 accounts for all anticipated cost and includes grant-funded staff salaries and benefits (\$26,600), travel (\$55,800), supplies, materials and equipment (\$2,466), contracts and subawards (\$27,000), stipends, per diems and honorarium (\$8,663), meeting costs (\$2,000), and federally negotiated indirect rate of 22.42% (\$27,471).

## **DIVERSITY PLAN**

For the *Welcoming Spaces National Forum* to successfully meet its goals, the project team will need to identify representatives from all geographic regions, service areas types, sizes, and communities served to attend and participate fully in the event. The project team will need to ensure that all attendees feel respected, heard, and valued in the space. Since the libraries and children's museums will be encouraged to invite their community partner and/or constituent, participation by representatives of underserved communities will be encouraged. As part of the planning process, the project team will seek stakeholder groups that would be willing to provide input on what their constituents need from libraries and children's museums.

When envisioning the desired patron experience, ALSC refers to this definition of inclusion, adopted by ALA Council in 2017 per the recommendation of the ALA Task Force on Equity, Diversity and Inclusion:

Inclusion means an environment in which all individuals are treated fairly and respectfully; are valued for their distinctive skills, experiences, and perspectives; have

equal access to resources and opportunities; and can contribute fully to the organization's success.<sup>2</sup>

This is the image the project team holds for the experience an immigrant or refugee should encounter when accessing a library or children's museum; one in which they are valued and respected.

## **NATIONAL IMPACT**

This proposal is in recognition that the *Welcoming Spaces National Forum* represents a project in the exploratory phase of maturity.<sup>3</sup> This *National Forum* is the beginning of a conversation that ALSC and ACM hope will spur increased collaboration between youth librarians and the staff of children's museums. The initial goal of elevating best practices in this area of underserved communities is a solid beginning. By focusing on the service to immigrants and refugees, this grant will allow ALSC and ACM to establish a forum structure that can then be translated and applied to other issues facing shared patrons of libraries and children's museums.

As a result of the *Welcoming Spaces National Forum* and White Paper, libraries and children's museums will gain an enhanced understanding of the challenges faced by immigrant and refugee populations and how to assist those community members. All resources developed as part of this project will be easily accessed online, downloadable, and organized in an easily printable format. The project team will format digital content with accessibility in mind.

This project seeks to begin the conversation by focusing on recent immigrants and refugees, however, it is the hope of both associations that the *National Forum* process and resulting outcomes will lay the groundwork for future efforts around working with children whose families have experienced barriers to accessing the resources of libraries and children's museums because of their race, tribal membership, intellectual or physical disabilities, sensory needs, former incarceration, LGBTQ+ identification, housing situation, or socioeconomic status.

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<sup>2</sup> Adapted from Society for Human Resources Management, Hewlett Packard, and Ferris State University.

<sup>3</sup> Matthew, Kathryn K. (2018, June 8). Biscuits vs. Granola: Innovative Ways for Libraries, Archives, and Museums to Scale Up. Retrieved on 03/11/2019 from <https://www.ims.gov/blog/2018/06/biscuits-vs-granola-innovative-ways-libraries-archives-and-museums-scale>

**Schedule of Completion: ALSC/ALA+ACM NLG-L, Welcoming Spaces National Forum**  
National Forum Grant, Community Catalysts, Sept. 2019 - Aug. 2021

ACTIONS	GRANT YEAR 1											
	2019				2020							
	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Start date of grant activities												
Identify and secure venue												
Confirm advisory board												
Convene advisory board												
Contract with external evaluator												
Contract with writer												
Invite National Forum attendees												
Review applications and select participants												
Confirm speaker and hotel logistics												
Host National Forum												
Compile notes & findings from forum												
Webinar #1 preliminary findings												
Conference presentations												
Writer drafts best practices White Paper												

**Schedule of Completion: ALSC/ALA+ACM NLG-L, Welcoming Spaces National Forum**  
National Forum Grant, Community Catalysts, Sept. 2019 - Aug. 2021

ACTIONS	GRANT YEAR 2											
	2020				2021							
	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Convene advisory board												
Conference presentations												
Writer drafts best practices White Paper												
Call for comments on White Paper												
Webinar #2 White Paper launch												
Disseminate White Paper												
Evaluation activity												
Preparation of final report to IMLS												



## 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?