

The Kansas City Public Library

The Kansas City Public Library is leading an application for a \$249,586, two-year National Leadership Community Anchors Project Grant. The goal of the project is to introduce and propagate community-based online learning programs in libraries across the country using the learning circle model developed by Peer 2 Peer University (P2PU). In the learning circle model, librarians play the role of facilitator: a non-content expert who works with a group of 5-15 adults on a weekly basis to work through an online course together. In a 2015 pilot across Chicago Public Library, groups of first-time online learners successfully completed online courses in a variety of subjects including public speaking, resume writing, and HTML/CSS. This project will support the transformation of learning circles from a viable, yet niche, program in Chicago to a flexible, intuitive tool that librarians around the country can easily pick up and activate in their communities.

There is a large gap between the rhetoric of online course providers, claiming that “anybody can learning anything online”, and the reality that many people lack the digital competency, academic confidence, computer access, and/or knowledge about online learning to meaningfully partake. Learning circles are intended to widen access to free, online courses to those who need it most: adults with low digital literacy and no higher education degree. By contextualizing free, online courses in a supportive, social environment, librarians have the opportunity to invigorate libraries as a community hub for digital inclusion and lifelong learning.

KCPL will partner directly with P2PU for this project, working closely with the learning lead (Grif Peterson) and development lead (Dirk Uys). Additionally, KCPL will be joined by five diverse library systems (Charlotte Mecklenburg Library, North Carolina; Chicago Public Library, Illinois; Cleveland Public Library, Ohio; Tampa-Hillsborough County Public Library, Florida; and Twin Lakes Library System, Georgia), a Kansas City-based researcher (Nailah M'Biti), strong dissemination partners (PLA, OCLC WebJunction), and a 6-person Advisory Committee. The diverse backgrounds and goals of the team will ensure that the project achieves national impact, growing a movement of libraries to serve as both anchors and catalysts for community-based online learning experiences.

Over the course of the two-year grant period, P2PU will train librarians and oversee three rounds of learning circles at each library system. Between the first and second round, KCPL will host a summit for the project team and two representatives from each partner library to discuss the limitations and affordances of learning circles in public libraries across the country. P2PU will lead iterative improvement of the learning circle toolkit for the duration of the program, working with librarians and patrons to improve software tools, facilitator workshops and handbooks, promotional materials, and the virtual community (all of which are openly licensed under MIT Open Software and Creative Commons BY-SA 4.0 licenses). Nailah M'Biti will conduct formative and summative evaluation of the learning circle program, packing her findings into a series of case studies that provide librarians with tips on starting learning circles in new communities. Finally, to ensure that the program grows beyond these six cities, the project team has secured a commitment from Public Library Association and OCLC to disseminate the results of this project through their respective channels.

By the end of this project, the team will train 50 librarians to run 100 new learning circles across the 6 partner systems, reaching at least 500 patrons; grow the online community to include contribution from at least 50 facilitators; publish case studies documenting the affordances of learning circles; launch an expanded web toolkit that is utilized by at least 10 additional library systems, and work with a community organizer at each library to develop an ongoing sustainability plan. The project will impact the library world by creating a comfortable and engaging learning environment for people who cannot or will not otherwise access formative educational opportunities; strengthening the public library's position as a core point of access to high-quality learning opportunities within their local communities; and demonstrating the non-formal learning circle model as a viable alternative to some formal education offerings.

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The Kansas City Public Library (KCPL) respectfully seeks a \$249,586, two-year National Leadership Community Anchors Project Grant to introduce and propagate community-based online learning programs in libraries across the country using the learning circle model developed by Peer 2 Peer University (P2PU). In the learning circle model, librarians play the role of facilitator: a non-content expert who meets with a group of 5-15 adults on a weekly basis to work through an online course together. In a 2015 pilot across the Chicago Public Library system, groups of first-time online learners successfully completed online courses in a variety of subjects including public speaking, resume writing, and HTML/CSS. This project will support the transformation of learning circles from a viable yet niche program in Chicago to a flexible, intuitive tool that librarians around the country can easily activate in their communities.

KCPL is a national leader in both lifelong learning and digital inclusion. Already recognized for its robust public programming calendar (with more than 3,000 free, public programs each year), the Library has recently become central in this country's fight for digital inclusion. Part of the White House's Connect Home, ConnectED, and Connecting America initiatives, a founder of Kansas City's Digital Inclusion Coalition, and host to National Digital Inclusion Alliance's (NDIA) first conference in 2016, the Library is now working with the City of Kansas City, MO to develop a community-wide strategic digital inclusion plan. In 2017, KCPL Director R. Crosby Kemper III will become the Board Chair of Schools, Health & Libraries Broadband Coalition (SHLB).

P2PU, a non-profit organization, has seven years of experience designing learning experiences outside of institutional walls, working with a diverse group of partners including MIT Media Lab, New York University, Creative Commons, Mozilla, and the Open Knowledge Foundation. P2PU has worked closely with public libraries around the world for the past two years, and learning circles were recently featured as the sole adult education program in the U.S. Department of Education's 2016 National Education Technology Plan.

1. Statement of National Need

Addressing National Challenges: The growth of online learning in the past decade has promised that anybody can learn whatever they want, whenever they want. This, however, is largely a false promise, as the vast majority of individuals who complete free, online courses already have a college degree. At the KCPL computer labs and H&R Block Career, we see on a daily basis the rift between the needs of our patrons and the opportunities presented by online learning materials. To be a successful online learner, patrons must have strong digital literacy, self-motivation, and perseverance in the face of neither social support nor contextualized course content. These barriers prevent many patrons from meaningfully engaging with online learning opportunities. However, with trained staff, access to digital resources, strong community ties, and a culture of lifelong learning, public libraries remain well positioned to address and meliorate these barriers, transforming courses into engaging and empowering learning experiences for millions of Americans who are currently excluded.

The proposed project will make substantial contributions to our understanding of this unique situation that exists in the United States – the confluence of free, online learning opportunities and the use of public libraries as alternative sites of learning. Scholars have long supported the notion that online education has significant potential to deliver education inexpensively and at scale (Rice, 2006)¹. In the past five years, massive open online courses (MOOCs) generated a great deal of excitement, as larger portions of the general population gained access to the internet and could freely enroll in online courses provided by the best higher education institutions (Woldrop, 2013). This excitement led to the rise of MOOC providers such as Coursera and EdX, and governments attempting to pass legislation and fund pilot programs to use open courses as a way to broaden access to higher education for underserved learners (Chafkin, 2013; Education News, 2013).

¹ See Supporting Document 2 for a complete bibliography of sources cited.

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One major example was the state of California, which partnered with MOOC provider Udacity in 2013 to offer online courses in remedial mathematics for community college students. The high-profile pilot resulted in mediocre results, however. Students with lower, prior academic achievement – and thus, those in need of the most learning supports – fared poorly in the online environment compared to their peers in face-to-face courses. These results mirror other studies of college students, showing that students with lower, prior academic achievement profiles often fare worse in online courses compared to peers in face-to-face courses, while higher achieving students fare much better (Figlio, Rush, & Yin, 2013). The failed pilot prompted Udacity to move away from offering online courses for everyone, and to focus only on niche learners who already had advanced degrees and wanted to improve their skills in targeted areas (Chafkin, 2013). Recent studies of MOOCs also highlight how sustaining learner participation and engagement is very difficult, with the majority of students dropping out of courses (Clow, 2013; Perna et al., 2014). Not surprisingly, the excitement over open education has waned considerably (Westervelt, 2013).

We argue that it is a mistake to abandon the use of MOOCs and, more broadly, open education resources (OER) as tools to widen access to learning experiences. Instead, we need research that sheds light on the benefits and limitations of OER, in order to effectively broaden learning opportunities for underserved populations. A primary reason MOOCs have failed to deliver on anticipated promises is because of their limitations as a stand-alone pedagogical tool. Open courses provide expanded access for a broader range of learners. However, it is critical to understand that access alone – while potentially enabling broader pathways for learning – does not lead to learning outcomes.

Instead, research suggests that students need a variety of experiences and supports to best leverage tools for learning. For example, learning builds on one's prior knowledge and experiences (Bransford, Brown, & Cocking, 2000; Bransford & Schwartz, 1999). Thus, it should be no surprise that students with higher, prior academic achievement fare well in online courses compared to their peers in traditional, face-to-face courses. Conversely, students who have less prior academic experience in a domain require more supports and scaffolding that build up their experiences and mental models (Kirschner, Sweller, & Clark, 2006; Kirschner & van Merriënboer, 2013; Quintana et al., 2004). Such learners fare worse when left alone with online content.

Research in the learning sciences also suggests that content alone is not enough, and learners need to develop a deeper commitment to pursue a domain. Learners need environments that support their continued pursuit of personal interests (Azevedo, 2011, 2013) and dispositions to persist in a domain (Gresalfi & Cobb, 2006; Yeager & Dweck, 2012), that they find to be personally relevant (Calabrese Barton & Tan, 2010; T. Clegg & Kolodner, 2014), socially valuable (Carlone & Johnson, 2007), and where they feel valued by others in the community (Lave & Wenger, 1991). Learning environments that thoughtfully use tools to create experiences that match up with learners' prior skills, knowledge, and sense of self are the key links to helping individuals develop deeper commitments to pursue a pathway (Ahn, Subramaniam, et al., 2014; Polman, 2006). These learning principles do not lose their applicability now that academic content is now freely available to a broader range of learners online, and in fact become more important as diverse learners can access a wide variety and range of learning materials on their own. There is little known about how to leverage OER in specific learning environments to then (a) provide the needed supports for different types of learners, and (b) help underserved learners develop deeper pursuits beyond the learning materials.

One key context to broaden learning opportunities is the public library. A robust history of research has documented how public libraries offer tremendous benefits to local communities, particularly for underserved populations. Libraries are traditionally known as institutions of information, where local communities can access a wide variety of information resources (e.g., books, print materials etc.). However, libraries play a major role in providing internet access to low-income communities (Bertot, McClure, & Jaeger, 2008). They are environments where residents can meet, share information, socialize and develop community bonds (Aabø, 2005), and researchers have documented how low-income and immigrant populations utilize these

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community institutions (Audunson, Essmat, & Aabø, 2011; Fisher, Durrance, & Hinton, 2004) in ways that further their own life goals. There are ripe opportunities to dive deeply into understanding how library environments can be better utilized to promote alternative learning pathways for individuals in underserved communities.

Recent scholarship has called for a shift in thinking about how libraries can foster learning and how librarians can evolve from their roles as information providers to facilitators of a variety of learning experiences. For example, researchers are documenting how libraries are playing a major role in the maker movement, offering spaces to broaden access to engineering and computational thinking activities (Halverson & Sheridan, 2014). In addition, there is growing awareness that library spaces can provide rich environments to promote digital inclusion (Castek et al., 2015) and that individuals are turning to the library to provide relevant and trusted educational and professional opportunities (Horrigan, 2016). This project leverages the growing interest in utilizing community libraries as environments to broaden access to educational opportunities. We argue that libraries may provide the critical supports – infrastructural, social, and peer – needed to augment the capabilities of open education resources and may help to broaden participation for the unique population of learners that are frequent patrons of public libraries.

Significance and Timelines: This project seeks to capitalize on advances made by Chicago Public Library and P2PU to demonstrate that adults with low digital skills and without higher education degrees can succeed in online courses, and that libraries have a crucial role to play in ensuring this success. Through a Knight News Challenge Grant in 2015, Chicago Public Library and P2PU teamed up to develop a toolkit and methodology for adults who wanted to take online courses together in public libraries. The program relied on librarians not as content experts, but as facilitators who could recruit patrons, identify online courses that resonate with patrons, support a peer learning atmosphere, and help participants better utilize the library and online learning resources.

Librarians identified a variety of online courses and began to meet with groups of 5-15 adults in what quickly became called “learning circles”.² After 6-8 weeks, overall course completion rates were close to 50%, compared to 5-10% for overall completion rates when these same courses are taken solely online. Furthermore, 65% of learning circle participants were first time online learners. Perhaps the most important lesson from the learning circle pilot was that participants gained skills outside of the content included in the online course: participants pointed to “learning from peers”, “sharing feedback”, “gaining academic confidence”, and “building a better relationship with the library” as highlights from their learning circle experience.

Following this proof of concept pilot, P2PU released an open source learning circle toolkit designed to support librarians start learning circle programs. The learning circle toolkit is comprised of a facilitator handbook, selection of curated online courses, software tools, promotional packages, professional development workshops, and a virtual community of practice. All components of the toolkit are, and will remain, available to librarians and community organizers around the world under MIT Open Software and Creative Commons BY-SA 4.0.³ The toolkit has already supported the growth of learning circles in Chicago and has prompted pilots in a handful of public library systems in the U.S. (including Kansas City and Charlotte). To learn as much as possible from toolkit usage, P2PU has also started to deploy the model outside of libraries in adult education centers (Boston, Portland, Providence) and museums (Pittsburgh), as well as internationally,

² For a list of courses currently used in learning circles, see: <https://learningcircles.p2pu.org/en/courses/>

³ The current version of the toolkit can be viewed at <https://www.p2pu.org/facilitate/> and a copy of the facilitator handbook, a major component of the toolkit, is included as Supporting Document 4.

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with libraries in Kenya (through partnership with Open Society Foundations and eIFL, a non-profit that works with libraries internationally) and in Paris (in partnership with the Centre de Recherches Interdisciplinaires).

As learning circles continue to grow, there are opportunities to learn from this program to inform other work that happens at the library, as well. For, example, learning circles address each of the four points that IMLS seeks to identify in successful Community Anchors projects:

- **Civic and cultural engagement:** Public libraries in Chicago, Detroit, Nairobi, and Nakuru, Kenya have partnered with community organizations, viewing learning circles as an opportunity to strengthen bonds between the library and additional service providers. As the program grows, we'd like learning circles to better serve as pipelines within and between community organizations, including museums, community colleges, political organizations, and nonprofit organizations.
- **Lifelong learning:** Lifelong learning demands that education be responsive to the needs of the people it serves. Librarians in Detroit and Milledgeville experimented with crowdsourcing learning circle topics by soliciting feedback from community members online and by the circulation desk. As librarians across the country facilitate groups working through the same open learning resources, there are also opportunities to document and collaborate nationally, remixing OER to better suit the conditions of libraries and learning circles. P2PU is currently working with the Children's Museum of Pittsburgh to help disseminate the findings from their 2014 IMLS grant on makerspaces as an open online course designed to be run as a learning circle.
- **Digital inclusion:** One thing that all learning circles have in common is that the course materials are hosted online. Whether an individual wants to learn public speaking, digital marketing, or accounting, there is a strong digital inclusion component to learning circles. Those who complete the learning circle are not just learning more about the subject they signed up for, they also become more competent online and better positioned to engage in online learning on their own. With support of the librarian and peer learners, many library patrons have identified learning circles as a safe, comfortable, and motivating atmosphere to first try an online course. Beyond this, many librarians use learning circles to target digital literacy directly. KCPL ran a fall 2016 learning circle pilot called "Making the Internet Work for You" using GCF Learn Free materials, and other libraries have run learning circles in HTML/CSS and Introduction to Python.⁴
- **Economy vitality:** The majority of participants in learning circles are attending primarily for professional reasons - either they are un/under-employed, or they are seeking a promotion or trying to enter a new field. Regardless of intent for joining learning circles, success is not measured through completion certificates but what the patron can do with the skills, community, and character that they develop during the process.

Relationship to previous work: Public library systems are addressing digital inclusion in myriad ways. Some libraries set aside 1:1 tutor time and tech support for patrons, while others develop their own content that is freely available in the library. Some libraries pay licensing fees to gain access to existing banks of digital resources, such as GALE or lynda.com. Many libraries mention, or at least allude to the world of MOOCs and OER, but there is often a cultural divide that emerges between the library's tendency to categorize learning resources as discrete objects and the open, limitless, scope of learning on the web. Learning circles represent an opportunity to blend the scale and opportunity of online learning with the intimacy and flexibility of face-to-face programming. Past research authorized by IMLS, including Tutor-Facilitated Digital Learning Acquisition (Castek, et al., 2015) will be considered when developing this program.

⁴ See Supporting Document 5 for a copy of a blog post about the fall 2016 KCPL learning circles.

2. Project Design

Goal and Assumptions: This grant is designed to support the growth of learning circles from a small, open-source project to an integral part of library programming across the United States. The primary assumption is that the learning circle model delivered through public library systems can increase the likelihood of successful online learning for adults without college degrees. This has been anecdotally validated through the growth of learning circles across multiple library systems in 2015 and 2016, and the evaluation component of this project will seek to demonstrate this more concretely.

Audience: There are three primary stakeholders in this project: adult library patrons, adult service and public programming librarians, and library systems. The partner libraries were selected to ensure that we work with a diverse set of stakeholders and are not developing tools and resources that only suit one particular community. Based on past experiences with learning circles and the library communities we have identified for this project, we expect to serve a number of patrons from traditionally underserved communities including unemployed adults, immigrants, English language learners, and senior citizens.

Chicago Public Library and Cleveland Public Library are both large, urban library systems with a diverse set of branches. Chicago has already facilitated nearly 40 learning circles, and is now focusing on job skills learning circles and develop stronger pathways into and out of learning circles by connecting with local community organizations and universities. Cleveland, on the other hand, has not run any learning circles yet, and views this project as an opportunity to connect with what they call “The People’s University”, an initiative to bring patrons into the library to learn a wide range of subject matter using primarily online learning materials.

Kansas City, Charlotte Mecklenberg, and Tampa-Hillsborough are all mid-size library systems that serve urban, suburban, and some rural communities. Kansas City has already facilitated two learning circles about web literacy and is most interested in continuing to grow as a hub for digital literacy and lifelong learning across the region. Charlotte and Tampa both have plans to run learning circles in early 2017 and will generate data and feedback from librarian facilitators to feed into this project. Both Kansas City and Charlotte have expressed interest in identifying non-librarian facilitators, such as volunteers, students, and Americorps members. Finally, Twin Lakes Library System is a 2-branch system in Milledgeville, Georgia. They are interested in using learning circles to leverage the relationship they have with their local university.

Activities: Each library system will run a round of learning circles in fall 2017, spring 2018, and fall 2018. Alongside the learning circles, the project team will conduct iterative development and formative evaluation, refining the learning circle model and toolkit after each round of learning circles. The primary activities are outlined below, followed by a detailed description of the anticipated development and evaluation plans.

- **Design (5/17 - 8/17):** Each library will designate at least two representatives for the first round of learning circles; a community organizer and at least one librarian facilitator. The community organizer will champion the program locally, perform day-to-day communication and monitoring of project-related activities in the selected pilot libraries, assist in collecting and disseminating feedback and results, and serve as the primary point of contact between the project team and the library. The project team will work with each partner library to train them for the first round of learning circles. This training will cover five primary subjects: overview of the program and goals; background of online learning; discussion about context-specific considerations, including existing programming, communication channels, and networks that might be leveraged; overview of learning circle toolkit, and demonstrating techniques for successful learning circles, including facilitation training, course selection feedback, and brainstorming long-term sustainability.
- **Pilot (9/17 - 11/17):** Each partner library will be responsible for recruiting learners and facilitating the first round of learning circles. Facilitators will report weekly on progress, identifying both struggles and

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opportunities that might be relevant for other facilitators. P2PU will provide librarians with technical support, ongoing facilitation support, and project management/coordination while the learning circles are running.

- **Iteration (12/17 - 3/18):** The project team will conduct a survey and implement other research tools to support learning circle analysis and future development, based on evaluation tools and other feedback mechanisms (a mix of feedback surveys, interviews, debrief workshops, and data collected during the learning circle related to attendance, retention, completion, and satisfaction). P2PU will synthesize this feedback, prototype iterative changes, user test the changes with librarians, and deploy the changes.
- **Summit (4/18):** KCPL will host a 2-day workshop in Kansas City for the project team and 2 members of each partner library (including each community organizer). This workshop will be used to test our improvement to the learning circle toolkit, discuss new opportunities for growth, and start building national consensus around the opportunities for community-based online learning in libraries.
- **Pilot II & Iteration (5/18 - 8/18):** Following the summit, each library will conduct a second round of learning circles. The community organizer from each city will host a training in their library to engage a wider number of librarians. Following this pilot, a second iteration period will begin.
- **Pilot III (9/18 - 11/18):** A third round of learning circles will commence in fall 2018. Community organizers and the project team will work together to onboard additional librarians, with the goal of running learning circles in at least 30% of the total branches represented by the six partner communities.
- **Iteration, Dissemination, and Wrap Up (12/18 - 4/19):** Following the final round, the project team will conclude a final iteration round, compile all feedback, and begin summative evaluation. This will conclude with the release of learning circle case studies to help new libraries get started, an updated learning circle toolkit, and sustainability plans for each of the six partner libraries, as well as a plan for national scale-up.

Throughout the project, P2PU will utilize the results of the formative evaluation and additional feedback mechanisms to conduct iterative improvement and refinement to the learning circle toolkit. While we plan to identify strategic areas for improvement with the partner libraries over time, there are four points of interest where we currently see room for toolkit improvement based on recent and ongoing pilot projects. These improvements cover different components of the toolkit, including the software, the facilitator handbook, and the virtual community of practice.

- **Learning circle promotion:** Currently, when facilitators create a learning circle using the learning circle software, they receive an email with a link to a webpage where people can sign up. All other promotion - flyers, social media, etc. - must be constructed manually. As we grow this program, automatically generating flyers, Tweets, and other learning circle messaging will reduce the time spent by facilitators and organizers on logistical matters and will encourage facilitators to more widely promote the program to generate maximum participation.
- **Improve community of practice:** The virtual community of practice is currently a Google Group with approximately 30 participants who share feedback with one another on an ad hoc basis.⁵ It is a useful space for facilitators to ask questions, document practices that have worked well for them, and share victories and lessons learned. As the program grows, we'd like to design more specific interventions to support collaboration and engagement between librarians. One opportunity is to provide feedback for the online courses that are being run. If a facilitator has worked through a particular online course over six weeks, they likely have feedback for others who might want to facilitate that course, and we can better support them in sharing their feedback with the broader community.

⁵ View the google group at: bit.ly/p2pucommunity

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- **Greater autonomy for community organizers:** The learning circle software offers a great deal of autonomy for facilitators, however, more can be done to empower community organizers to run a network of learning circles independently of P2PU. It is currently a manual process for P2PU to grant an organizer the authority to create and oversee a certain subset of learning circles. Furthermore, while each library system has a unique URL where people can view learning circles happening at that library, community organizers do not have control over the specific URL, imagery, or a custom list of courses available to their librarians. We would like to maintain each library community as part of the larger P2PU ecosystem while also allowing community organizers to take more ownership of their local homepage.
- **Integrated feedback:** We currently receive inconsistent learner survey feedback from learning circle participants. To address this, we propose to simplify the survey and integrate it into the learning circle toolkit, rather than having it exist as a standalone Google Form. We will encourage learners and facilitators to discuss feedback and reflection in the final week. Ideally, the act of providing feedback should seem less like participants are doing a favor for their facilitator or P2PU; the evaluation should be fully integrated into the model so that participants feel like their feedback is fundamental towards the improvement of the model for learners elsewhere.

Evaluation: This project includes a robust evaluation component led by Nailah M'Biti, Founder and Director of Compass Nonprofit Solutions in Kansas City. Nailah has extensive experience managing, evaluating, conducting research on behalf of nonprofit organizations and comes highly recommended from the Midwest Center for NonProfit Leadership. She also worked extensively with a number of Kansas City community organizations under a 3-year U.S. Department of Health and Human Services capacity-building grant. Our evaluation will address how learning circles work within the confines of the public library system for adult patrons, serving as a standardized assessment of progress across each of the six partner sites as well a comprehensive evaluation of the learning circle model. Program evaluation will include three components: formative and summative assessments to determine the progress of the project and achievement of intended results; assessment tool designed for use by librarians; and oversight of data collection and management.⁶

- **Formative and summative assessment:** We will collect and analyze a broad array of data that will provide an aggregated view of the institutional, personal, and community needs for learning circles to grow, while simultaneously accounting for the activities, outcomes, and objectives listed in this proposal. We have developed four hypotheses (and subsequent questions for each) concerning the impact of learning circles. Our hypotheses will guide our approach to data collection and analysis, as well as align with our identified Performance Goal (Learning), and associated Performance Standards in the National Impact section.
- **Assessment tool designed for use by librarians:** The learning circle toolkit is comprised of several checkpoints for data collection and analysis, including an initial site survey, learner applications, weekly facilitator feedback prompts, and post-circle assessment for learners and facilitators. However, these resources have emerged over the past two years in an ad hoc fashion, and the project team would like to take this opportunity to refresh the assessment tools, ensuring that the information we are collecting is useful, accurate, and gathered in a way that is supportive of the learning process. Nailah will be directly involved in the development of these resources, ensuring that learning circle communities across the globe have access to tools that help them assess the program on a local level.
- **Oversight of data collection and management:** Nailah will oversee the collection and management of data that is generated over the course of this project. This will help to ensure that the requirements of all

⁶ A detailed evaluation strategy can be found in Supporting Document 3.

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constituent parties (P2PU, partner libraries, librarian facilitators, patrons, Nailah, and IMLS) are accounted for in as efficient a manner as possible.

Challenges/Risks: P2PU has faced three primary challenges in the past when deploying learning circles in public libraries. These challenges, along with plans to mitigate them, are briefly outlined below.

- **High-quality, openly-licensed courses skew towards those with college degrees.** Facilitators can run a learning circle for any online course with which they identify, however, P2PU has already selected 30 courses that work well for our targeted adult library patrons. The number of selected courses is fairly low because a great deal of high-quality, online courses focus on highly-specialized subject matter that is biased towards computer programming, engineering, and math. To address this challenge, P2PU is working with multiple partners, including KCPL, to develop new online learning materials that are better targeted towards our project audience. As mentioned above, there is an opportunity for facilitators and participants to contribute to the online courses they take, creating both an empowering learning experience for participants and better online courses for future learners.

- **High librarian desire for learning circles, little internal capacity to run the programs themselves.** The oft-stretched capacity of librarians -- many run a branch single-handedly -- has led P2PU to consider alternative learning circle facilitators within each library's community, including local graduate students, AmeriCorps participants, Google Fiber digital inclusion fellows, and learning-circle alumni. The libraries selected for this project have all committed to running learning circles and have a wide range of opinions on bringing in outsiders to facilitate. The library catalyst fund and support that this grant provides will ensure that we can experiment in order to develop facilitator best practices for each library and consider a variety of ideas for staffing learning circles in the future.

- **The learning circle toolkit must be a stand-alone application that is not designed for any single institution, while considering the technical and bureaucratic nuances of library systems.** For any program to succeed in U.S. public libraries, it must do more than merely provide content. For learning circles to succeed they have to "just work", meaning that everything from promotion and scheduling to identifying next steps for participants once the learning circle is complete needs to be included into the toolkit and be easily deployed within a public library context. In this grant, we will build out the capacity for the learning circle toolkit to support learning circle promotion pathways for learners after learning circles, while trying to broaden the utility of these improvements beyond the needs of the six communities included in this project.

Team: The project team will be led at KCPL by Carrie Coogan (Deputy Director of Public Affairs and head of Digital Inclusion initiatives) and Wendy Pearson (NTEN Digital Inclusion Fellow) who will ensure that learning circles grow in Kansas City and will coordinate with P2PU as well as partner library systems across the country. They will work closely with the Chief Financial Officer and Development Director so that KCPL may serve as financial agent for this national grant.

Carrie and Wendy will be joined by two individuals from P2PU who were most heavily involved in the development of learning circles; Grif Peterson (Learning Lead) and Dirk Uys (Development Lead). Grif will be responsible for the day-to-day management of the project and coordination between team members. Dirk will lead the development of learning circles tools and resources. P2PU is currently in the process of hiring a program coordinator, who will be actively involved in working with facilitators on a weekly basis. This person will be hired and onboarded before the IMLS project begins. Finally, Nailah M'Biti (researcher) will oversee all aspects of program evaluation for the duration of this project. Please see the list of key project staff and consultants for more information on the team.

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Each of the six partner libraries will designate a community organizer, who is the person primarily responsible for growing the learning circle program in her or his respective city. As outlined in the Project Design section above, these organizers may or may not themselves facilitate a learning circle, but they are expected to be one of the two attendees at the workshop in Kansas City. The anticipated community organizers are: Wendy Pearson (Digital Inclusion Fellow, Kansas City Public Library); Martha Yesowitch (Educational Partnerships Manager, Charlotte Mecklenburg Library); Kate Lapinski (Learning and Economic Advancement Librarian, Chicago Public Library); Tim Diamond (Chief Knowledge Officer, Cleveland Public Library); Lorie Tonti (Manager of Learning Experiences, Tampa-Hillsborough Public Library), and Stephen Houser (Director, Twin Lakes Library System). Each library will also designate an initial set of facilitators, which is expected to grow to 4-15 per system over the course of the project, based on the size of the system.

Finally, the project team will virtually convene an Advisory Committee at least four times during the project cycle to analyze feedback, set development priorities, and highlight new opportunities for growth and collaboration. Commitment letters are attached for the following members: Katherine McConachie (Learning Initiative Coordinator, MIT Media Lab), Chris Coward (Principal Research Scientist and Director, University of Washington Information School), Andrea Saenz (Deputy Director, Chicago Public Library), Rachel Merlo (Community Manager, Google Fiber, Kansas City), Angela Siefer (Director, National Digital Inclusion Alliance), and Matthew Fuller (Program Officer, Digital Inclusion Fund, Kansas City.)

Participation and Consensus Building: The learning circle model emphasizes collaboration and co-construction. As such, the project team and extended community of partner libraries and Advisory Committee will not be working in a vacuum. Learning circle participants will have the opportunity to facilitate their own learning circles if they so choose, and facilitators will interface with a growing virtual community of learning circle facilitators not just within this grant, but across the global P2PU ecosystem. Additionally, the project team will work closely with library staff as well as librarians, ensuring that the program is proceeding smoothly and aligned with both librarian goals and the mission and strategy of each institution.

Dissemination Plan: The project team will work to ensure that we are disseminating our toolkit and research beyond the immediate communities with which we are working. To ensure the broadest distribution of this work amongst our target audiences, the project team has a three-part dissemination plan. First, all tools and resources generated within this grant will be incorporated into the latest version of P2PU's learning circle toolkit, which is freely available online and licensed under MIT Open Software and Creative Commons BY-SA 4.0 licenses. Second, project evaluation results will be packaged as a series of publicly-disseminated case studies that provide librarians with tips on starting learning circles in new communities. Finally, the project team will ensure that knowledge gained during the project is shared widely across multiple audiences. P2PU will attend two conferences within the library (PLA, ALA), open education (MozFest, OpenEd), and/or adult education (COABE, CAEL) spaces, and the project team has secured a commitment from PLA and OCLC to disseminate the results of this project through their respective channels. This dissemination plan, in concert with the improved learning circle toolkit and additional P2PU implementation efforts, leads the project team to believe that at least 10 additional library systems will start running learning circles during the 2-year grant period.

3. National Impact

Addressing Statement of Need and Performance Goals: Our Statement of Need, above, declares an intention to better understand the opportunities that exist at the confluence of freely available online learning opportunities and the use of public libraries as alternative sites of learning. This is a vital need facing the U.S.,

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and one that is very well aligned with the IMLS National Leadership Community Anchors Learning Performance Goals of training and developing library professionals, supporting communities of practice, and developing and providing inclusive and accessible learning opportunities. Through this grant, the project team will have transformed the learning circle toolkit from a viable, yet niche, program to a flexible, intuitive tool that librarians around the country can easily pick up and activate in their communities. Learning circles have the potential to impact not just library programming, but also the often-disconnected domains of Open Educational Resources (OER) and adult education.

Project Targets: Based on the statement of need, IMLS agency-level and performance goals, and the goals of the project team, we have compiled the following outputs and impacts that this project will demonstrate.

- 50 librarians trained to run 100 new learning circles across 6 library systems (30% of total branches)
- Grow the online community to include contribution from at least 50 facilitators
- 6 community organizers (1 at each library) trained to oversee learning circles beyond the grant period
- 500+ patrons take part in learning circles, with 50%+ retention over 6-week period
- Improved learning circle toolkit utilized by at least 10 new library systems by end of 2018
- 6 published case studies documenting the affordances and opportunities of learning circles in a variety of settings

Overall Impacts:

- Provide a comfortable and engaging learning environment for people who cannot or will not otherwise access formative educational opportunities
- Position libraries as a core point of access for high-quality learning opportunities within communities
- Demonstrate non-formal learning circle model as a viable alternative to some formal education offerings
- Prepare P2PU to absorb exponential growth in demand for learning circles
- Highlight IMLS and KCPL as leaders in non-formal education and digital inclusion

Sustained Benefit: This project is led by two organizations that are very committed to the goals of this proposal. KCPL has strategically positioned itself at the center of the educational and digital inclusion ecosystems within Kansas City. Working with over 400 community organizations, including the City of Kansas City and local and national funders such as the Ewing Marion Kauffman Foundation, Hall Family Foundation, H&R Block Foundation, and The National Library of Medicine, KCPL is developing a 4-year strategic plan that will directly address the long-term sustainability of its funding for education, civic engagement, and digital inclusion efforts. Wendy Pearson is creating a volunteer force specifically crafted around learning circles and other digital literacy activities at the library, which will allow the library to sustain its participation in and support of this project well past the grant period. The learning circle project is at the heart of the library's digital literacy curriculum, which we are currently strengthening and standardizing to ensure continuity among all library locations, as well as among community centers, public housing locations, and churches.

Learning circles are also at the center of P2PU's mission. This work will be reinforced by additional projects funded by a variety of organizations including the Knight Foundation, Dollar General Literacy Foundation, and Open Societies Foundations. Furthermore, learning circles are designed to grow independently of any central organization. By developing all tools under open licenses, supporting a flexible community of users, and empowering participants to tailor learning circles to their own needs, P2PU strives to create a program that can exist without their direct support. Recently, two women who participated in a User Innovation learning circle in Detroit Public Library decided that they wanted to facilitate the course in the library, extending the opportunity they were granted to a wider audience. This is the ultimate form of sustained benefit, and precisely the type of learning environment that we seek to cultivate in this project.

2019

		JAN	FEB	MAR	APR
Conduct final evaluation	NM, P2PU	x	x		
Draft Case Studies	NM		x	x	
Release Final Documentation	NM, KC, P2PU		x	x	
Submit Performance Report to IMLS	KC				x

DIGITAL PRODUCT FORM

Introduction

The Institute of Museum and Library Services (IMLS) is committed to expanding public access to federally funded digital products (i.e., 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. However, applying these principles to the development and management of digital products can be challenging. 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

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 format 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 (i.e., how you will 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?