

## **Project Justification**

### **Goal 2: Strengthen Community Engagement**

Objective 2.1: Promote inclusive engagement across diverse audiences.

**What need, problem, or challenge will your project address relating to the goals and objectives of this grant program as articulated in [Section A2](#) and the project category you have chosen? How was it identified? Describe any assessment that led you to identify this need, problem, or challenge as a priority for your organization.**

Leading Cultural Anthropologists predict that 50% of the world's spoken languages will disappear within our lifetime. Histories, stories, folklore, dialects, cultural knowledge, personal accounts, indigenous perspectives and lineal connections to place that unite us with our pasts while simultaneously lighting our paths to the future are at elevated risk of being lost forever. As our native lands are being lost to private ownership and development at a pace faster than we can document our Wahi Pana (sacred and celebrated places) and Wahi Kūpuna (lands of our ancestors), it is imperative that we, as the indigenous people of Hawai'i, respond with a sense of urgency to document the personal accounts, stories, and cultural folklore of our 'āina (lands) held by our kūpuna (elders) before they leave this Earth.

### **Kamananui Valley**

The ahupua'a of Moanalua, a land division including Kamananui (Large Spiritual Power) and the companion Kamaikai (Small Spiritual Power) Valley, was once established as a center of hula and chanting during the reign of O'ahu's King Kakuhihewa in the 1600's. Voices of the past seem to whisper in the winds that blow through Kamananui Valley. Its history has been passed down through mo'olelo (stories) – the chants and legends of the creation, migration, and genealogy of its inhabitants – by valley chantress Nāmakahelu Maka'ena, who was born in the valley in mid-1800's.

The pristine 3,700-acre valley, the last remaining undeveloped ahupua'a (traditional land division) in urban Honolulu, is steeped in history and culture. Evidence of ancient Hawaiian habitation have been found in the valley dating back to the 1500's. Kamananui is host to many unique pre-Western contact cultural features and artifacts found nowhere else in Hawai'i. Ancient petroglyphs of three different types of pre-contact human figures are carved into large pōhaku (rocks) within the valley. Chantress Nāmakahelu once shared that the pōhaku (stones) were sacred, an akua (spirit) with two forms. There are hundreds of historic features protected within the valley which our team aims to uncover the cultural significance, folklore, and stories kept within the lineal descendants of Kamananui.

### **Our Kuleana (Responsibility) as Kānaka Maoli**

As Kānaka Maoli (Native Hawaiians), our kūpuna truly are our springs of mana (spiritual essence). Their wisdom, knowledge and personal accounts are critically important to the survival of our culture and the protection of our Wahi Kūpuna, the fervent lands that provided life for their kūpuna.

Historic preservation is a critically important kuleana (responsibility) for every civilization because it endeavors to preserve the mo‘olelo (stories), mo‘omeheu (culture) and history of a community, a people, and its treasured places of antiquity and connects us all with where we came from.<sup>1</sup>

In ancient times, our Native Hawaiian kūpuna (elders) had no written language. The ‘ike (knowledge) and mo‘olelo (stories) of our people were passed down orally from one generation to the next through oli (chant) and hula (dance). Our culture is the essence of who we are as a people. It includes all those things that distinguish us: our language, stories, customs, music, art, food, protocols, religions, values, traditions, and celebrations. Expressions of our culture are both internal and external. Our culture shapes our worldview and our thinking. It provides a framework for understanding ourselves and others. This defines who we are as the indigenous people of Hawai‘i. It informs the ways in which we interact with one another and with our ‘āina (land).<sup>2</sup>

With each death of our beloved kūpuna, the histories of individual ahupua‘a are disappearing before being passed on to the next generation. In the case of Kamananui Valley, we know of fewer than 10 descendants with direct lineal linkages to the families who once resided in the ahupua‘a.

After roundtable discussions with Native Hawaiian community leaders, lineal descendants of Kamananui Valley, and community stakeholders focused on preserving, respectfully perpetuating and sharing the rich history, cultural significances, and the unbroken genealogical connections to Kamananui Valley, it is essential that Moanalua Gardens Foundation (MGF), key cultural and environmental stewards of Kamananui Valley, undertake the proposed Hali‘a, Memories of Moanalua Oral History Project to capture the ‘ike and mana‘o (wisdom) of our kūpuna before they leave this Earth.

Every member of the working group that came together to undertake this mission-critical project expressed their individual concerns that our kūpuna with lineal and cultural connections to Kamananui Valley would pass away without having the opportunity to impart the ‘ike (knowledge) and mana‘o (wisdom) that had been passed down to them from their kūpuna (ancestors). Due to the aging of our kūpuna population, coupled with the current COVID-19 Pandemic, it is of utmost importance that our team create opportunities today for our living kūpuna to share their knowledge and wisdom with future generations.

### **Our Approach**

Oral history narratives, the result of the collaborative efforts of interviewers and narrators, have long been recognized as important supplements to written historical documents.<sup>3</sup> Oral history is especially important for documenting the history of indigenous peoples, whose inability and/or

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<sup>1</sup> Mahealani Cypher

<sup>2</sup> Office of Hawaiian Affairs, Mo‘omeheu - Culture

<sup>3</sup> Ronald J. Grele, “Movement Without Aim: Methodological and Theoretical Problems in Oral History”, (Chicago, Precedent Publishing, 1985)

lack of opportunity to record their history in written documents might otherwise have meant the loss of important historical faces and perspectives.<sup>4</sup>

For these reasons, MGF assembled its working group to capture the historic and cultural information and knowledge of our living kūpuna (elders) with deep connections to Kamananui Valley, one of the most culturally significant ahupua‘a (land to ocean district) in Hawai‘i. The project will professionally capture the oral histories of our kūpuna through professionally filmed interviews to create a digital library comprised of their oral histories, allowing access to all via the world wide web. The working group strongly believes that once made live, the comprehensive digital library will ultimately promote inclusive engagement across diverse audiences within and well beyond the shores of our Island State.

Through this project, our goal is to document and pass on the mo‘olelo (stories) of Kamananui Valley told by the lineal descendants and cultural practitioners connected to this ahupua‘a; once the seat of sacred learning on O‘ahu, with its unique heritage reaching back to pre-Western contact times. The time to do this is upon us, with many of our kūpuna entering into the final stages of their earthly lives.

**Who will benefit from your project? Be specific by identifying particular age groups, community members with particular needs, and/or other types of target audiences.**

According to the 2010 US Census, there are 527,077 Native Hawaiians living in the United States, with 237,107 living on the US continent and 289,970 living in Hawai‘i. With half of the total population of Kānaka Maoli living on the U.S. mainland and half of the population residing in the State of Hawai‘i, utilizing the world wide web as a vehicle to disseminate personal accounts of cultural, historic and ecological significance of Kamananui Valley, will benefit all Kānaka Maoli. By developing a digital library with internet access, Moanalua Gardens Foundation will share these invaluable mo‘olelo (stories) that have yet to be unveiled. Our partnership network will create a robust cultural information pipeline that will exponentially extend our organization’s reach into all Kānaka communities well beyond our current physical limitations.

**Project Work Plan**

Moanalua Gardens Foundation, with a rich 51-year history of caring for the historic Kamananui Valley, proposes the following Work Plan inclusive of steps our team will take to create a comprehensive digital library accessible to all Kānaka Maoli, Native Americans, and First Nations People across the world via the internet. Our goal is to create a web-based portal complete with interactive digital archives that disseminate firsthand historical and cultural mo‘olelo (stories or histories) passed down via oral lore from kūpuna (elders) to keiki (children).

Oral lore, is a form of human communication wherein knowledge, art, ideas and cultural material is received, preserved, and transmitted orally from one generation to another. The transmission is

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<sup>4</sup> Gary Y. Okihiro, “Oral History and the Writing of Ethnic History: A Reconnaissance into Methods and Theory” Oral History Review 9 (1981)

through speech or song and may include folktales, ballads, chants, prose or verses. In this way, it is possible for a society to transmit oral history, oral literature, oral law and other knowledge across generations without a writing system, or in parallel to a writing system.

Each kūpuna will be asked to share their mana‘o and ‘ike on such Hawaiian culture-based topics as:

- History of Kamananui Valley;
- Personal connections to cultural practices including, but not limited to, hula, chant, and la‘au lapa‘au (healing plants and practices);
- Historical events;
- Lineal connection to place;
- Aloha ‘Āina – caring for and safeguarding their ancestral lands;
- Revitalization and the perpetuation of Hawaiian Culture; and,
- Lessons taught to them by their kūpuna.

After carefully evaluating the positives and negatives of each form of capturing the knowledge of our kūpuna, video stood out as the ideal vehicle to capture our kūpuna(’s) oral history. Through this medium, Kūpuna are free to openly share their mana‘o and ‘ike, in their own personalized way in a setting that is meaningful to them and that they feel comfortable in.

Potential first cohort of interviewees include –

- Marian Kau, last living granddaughter of Malia Kau, hula master with lineal connection to Kamananui Valley
- Dwight Damon, Damon Family Historian, Prior owners of Moanalua Valley
- Nathan Napoka, Kānaka Maoli colleague of Frances Damon Holt
- Nalani Olds, Founder of the Prince Lot Hula Festival with lineal connections to Kamananui Valley
- Vicky Holt Takamine, Kumu Hula with lineal connections to Kamananui Valley
- Harriet Roxburg, descendant to the former caretaker of Moanalua Gardens
- Roddy Akau, Kahu of Kamananui Valley

## **Timeline**

**Months 1 – 4** Conduct a design charette with Kānaka ‘Ōiwi community stakeholders, lineal descendants of Kamananui Valley, Moanalua Gardens Foundation board and staff, producer and web design team to develop theme, content, and features of the new interactive web-based portal.

**Months 5 – 10** Conduct first round of filmed interviews with kūpuna (elders) and kumu (teachers), allowing each to share their personal and/or lineal connections to place, ‘ike, mana‘o, history, and/or cultural practices to be included in the Hali‘a Oral History archives.

**Months 11 – 12** Conduct video editing of all cohort 1 filmed content and prepare content for inclusion in Moanalua Gardens Foundation’s Hali‘a Oral History archives and our partner organization’s archives.

**Months 13 – 16** Develop a user-friendly web-based library archive and link it directly to Moanalua Gardens Foundation’s webpage for easy end-user access.

**Months 16 – 24** Prepare and upload all historical, cultural and place-based content to the digital library archive. This process is scheduled to be an ongoing process since the archive will never reach its capacity and new content will continue to be developed for years to come.

### **Who will plan, implement and manage your project?**

Moanalua Gardens Foundation Managing Director Pauline Worsham will serve as Project Director and manage all aspects of the proposed Hali‘a Oral History project. Ms. Worsham has extensive experience in grants and project management and is responsible for Moanalua Gardens Foundation’s operations, marketing, fundraising, grant writing, governmental affairs, and special event management. She has managed all of MGF’s grants for the past 13 years including the *Annual Prince Lot Hula Festival* and is responsible for the planning, coordination and management of the festival which won the 2018 Best Tourism Event for Heritage and Culture Award from aio Media and the Hawai‘i Lodging and Tourism Association.

Moanalua Gardens Foundation will contract Native Hawaiian and U.S Veteran Producer David Kalama Jr. of Kalama Productions, Inc. to serve as the primary media acquisition provider. With over 40 years of professional experience documenting Hawai‘i’s storied places and historic cultural events, Mr. Kalama Jr. maintains the trust and highest respect from and for the Native Hawaiian community. Mr. Kalama Jr. has filmed a multitude of signature cultural events and storied places including the Merrie Monarch Hula Festival, the Prince Lot Hula Festival, Nu Oli: The Story of Kawaiaha‘o Church, and Kaho‘olawe: kaho‘omālamalama hou ana ka maui ola.

Lineal descendant of Kamananui Valley Roddy Kamawaelualani Kawehi Akau will serve as cultural advisor to the project. Roddy is the Kahu (cultural steward) of the Moanalua Ahupua‘a (ancient Hawaiian land division). Because his lineal roots can be traced to Kamananui now known as Moanalua, Roddy has taken on the kuleana (responsibility) of helping to care for the Moanalua ahupua‘a, the boundaries of which stretch from the ridgeline of the Ko‘olau mountain range to the mouth of Pu‘uloa, now known as Pearl Harbor. For this project, Roddy will assist with the vetting of potential interview candidates, confirming cultural relevance of the project and assisting in the identification of lineal linkages to Kamananui.

Ku‘ulei Williams, Moanalua Gardens Foundation’s Office Manager will oversee the project’s fiscal management. A former nonprofit Executive Director, Ms. Williams has over 20 years of experience in administration, fiscal and organizational management. She is highly skilled in accounting, office supervision, fiscal and computer systems, and administrative support.

Ami S. Mulligan, a Ph.D. student at the Department of History at the University of Hawai‘i at Mānoa will provide research support for the Haili‘a project. Ami’s doctoral research focuses on Hawai‘i’s social history, primarily between the mid-nineteenth century through the early twentieth century. Ami has performed genealogical research since 2013 for a variety of different purposes, including military repatriation cases. Recent projects she has worked on as a graduate student include assisting with compiling a preliminary report about the Battle of Nu‘uanu for an

American Battlefield Protection Program grant, researching the history of West Maui, and serving as the HEA Project Coordinator at the Hawaiian Mission Houses Historic Site and Archive.

**What time, financial, personnel, and other resources will you need to carry out the activities? Identify any partner and/or collaborator organizations that will contribute to your project and describe their roles.**

To conduct the proposed Hali‘a, Memories of Moanalua Oral History Project, Moanalua Gardens Foundation projects needing two-years to undertake this project. From design charette to launching and expanding the oral history archive (see Action Plan for details and timeline), MGF will be actively engaged in all segments of the project.

Financial requirements for the Haili‘a, Memories of Moanalua Oral History Project will be \$82,700 for year 1 and \$67,300 for year 2 (See Budget Narrative for details). Year 1 will require funding for website redevelopment totaling \$20,000 in Year 1 and another \$5,000 in Year 2. All other expenses are projected to remain relatively unchanged for Year 1 and 2.

Moanalua Gardens Foundation personnel needed to manage and/or carry out the proposed project includes Managing Director Pauline Worsham and Office Manager Ku‘ulei Williams. Managing Director Pauline Worsham will serve as Project Director for this project, allocating 25% of her FTE to the management of this mission-critical project. Office Manager Ku‘ulei Williams will provide fiscal management over the project, allocating 20% of her part-time hours to the project.

Undertaking the directing and production of the Haili‘a Oral History Project’s filmed interviews is Mr. David Kalama Jr. Mr. Kalama Jr. will manage and oversee all aspects of the filming and production of the oral histories. Mr. Kalama Jr. will dedicate 100% of his contracted time to this project.

Moanalua Gardens Foundation will contract with a reputable web design firm to redevelop its current web-based presence and to create the e-platform upon which the oral history archives will be housed in a digital library and which will eventually include media from the Prince Lot Hula Festival and materials from MGF’s physical library. A website proposal is attached.

Providing cultural and research support for the project are Cultural Advisor Roddy Akau and Researcher Ami S. Mulligan, Ph.D. candidate. Mr. Akau will assist with the vetting of interview candidates, confirmation of cultural relevance, and identifying lineal linkages to Kamananui Valley. Ms. Mulligan will provide project-based research services to determine available and pertinent sources of information to inform the working group’s decisions on future genealogical research to identify additional prospective interviewee candidates.

Other project expenses include honoraria for interviewees, venue rentals, film permits, office rental, liability insurance, supplies, and IMLS required travel expenses (outlined in Budget Narrative) have all been included for funding consideration.

### **Partner Community**

MGF will develop a community of partners who share the vision of disseminating native knowledge to a broad audience. These institution candidates will include such entities as Kamehameha Schools, the University of Hawai‘i, The Bishop Museum, and the Office of Hawaiian Affairs. Other organizations may be added as appropriate.

The Oral History products produced through this IMLS Native Hawaiian Library Services Grant will be shared with the aforementioned partnership community, establishing additional access points via their web-based portal systems. This expands the availability of the recorded oral histories to over eight sources. The community will also participate in the promotional campaign to reveal and perpetuate the digital library.

### **What are the risks to the project and how will you mitigate them?**

The most significant risk to the project that our team projects is the mortality or out-of-state relocation of the lineal descendants and cultural practitioners with direct linkages to Kamananui Valley. This risk has certainly been exacerbated by the COVID-19 Pandemic. To mitigate this risk, our team aims to initiate the proposed project action plan in 2021. Our intent is to engage each project interviewee as soon as possible to best ensure that we are able to capture their mana‘o and ‘ike while they are in good health. It is imperative that our team, comprised of interviewers, cultural advisors, and videographers work at a pace to best ensure that our most vulnerable interviewees are interviewed in a timely manner.

With the aging of our kūpuna population here in Hawai‘i coupled with the COVID-19 Pandemic, there is an elevated risk to the health and wellness of our aging elder population, which in turn, could impact the project. Our project team will have its compliance plan in place to protect the health and safety of our kūpuna and follow strict COVID protocol aligned with all CDC recommendations. Director David Kalama Jr. plans to film two (2) interviews per day. Should the need arise, David is committed to making the appropriate adjustments to his film schedule to ensure the health and safety of our interviewees.

Natural elements beyond our control, including heavy seasonal rains, could potentially hinder our ability to complete the project on time. To mitigate this risk, our team will scout (and secure if necessary) alternative interview sites that would keep our interviewees, especially our kūpuna safe and healthy.

Lastly, consistency and reliability of funding from IMLS is another identified risk to the project. It is critically important that timely payments be made by IMLS to ensure that our service providers/contractors are provided with the financial resources necessary to complete the project on time. To mitigate this risk, MGF’s Project Director and Office Manager will work closely with the IMLS point person(s) assigned to our project to best ensure timely submissions of payment requests so that prompt payments from IMLS for services rendered are received.

### **What data will you collect, how often, and from what source(s) in order to measure your performance in terms of effectiveness, quality, and timeliness?**

Our team will collect mo‘olelo (stories/personal accounts) from lineal descendants and cultural practitioners with historical and cultural linkages to Kamananui Valley. Native Hawaiian Producer David Kalama Jr. of Kalama Productions will film in-depth personal interviews of Kānaka Maoli Kūpuna (Native Hawaiian elders) and cultural practitioners where each will share their personal accounts of life, culture, and the steeped history of Kamananui Valley.

Year 1 of this project will create six (6) professional quality video documentations that will be hosted on our soon-to-be-developed digital library as part of the proposed Hali‘a, Memories of Moanalua Oral History Project. Year 2 will see the second cohort of six (6) professional quality video documentations added to the digital library. The raw materials for these oral histories will be reserved in the MGF Digital Archive. The source of the information our team will collect will be provided directly from cohort members participating in the interview process. Each member will provide Moanalua Gardens Foundation with written permission to share the mo‘olelo (stories) captured during the video interviews. The recordings will become the exclusive property of Moanalua Gardens Foundation to the extent permitted by law. Intellectual and cultural property rights are not affected.

Once our team begins to conduct the interview process, we anticipate additional Kānaka Maoli to come forward to contribute their mo‘olelo (stories) to the digital archive, expanding the personal accounts, perspectives, and histories through our Hali‘a portal.

Our team aims to publish the first cohort’s interviews by May 2022 and the second cohort’s interviews by April 2023. Our goal is to share the mo‘olelo (stories) captured through this oral history project with 250,000 web visitors to one or more of our partner institutions web portals annually. Our partner’s web portals will maintain an accurate count of the number of data inquires each receives annually and provide these numbers to our team for analysis and record keeping purposes.

Quality, timeliness, and effectiveness will be collectively monitored by Moanalua Gardens Foundation’s Project Director, Cultural Advisor, contracted Producer and Kānaka Maoli community stakeholders. The Hali‘a, Memories of Moanalua Oral History Project will be designed, developed, and distributed by highly reputable Native Hawaiian businesses and organizations for the use and benefit of our entire Lāhui ‘Ōiwi (Native Hawaiian community).

### **How and with whom will you share your work’s general findings lessons learned?**

The proposed Hali‘a, Memories of Moanalua Oral History Project and the information gathered through personal interviews will be shared with all Kānaka Maoli, Native Americans, First Nations People, and all inquisitive minds across the world via web-based portals of our organization and our candidate community partners Kamehameha Schools, the University of Hawai‘i, The Bishop Musuem, and the Office of Hawaiian Affairs. Through the aforementioned partnerships, our team projects that the information gleaned from project interviewees will reach 250,000 people annually.





# MGF- SCHEDULE OF COMPLETION HALI'A ORAL HISTORY PROJECT

											YEAR TWO			
ITM	UNIT	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	
2022		13	14	15	16	2023		18	19	20	21	22	23	24
	'EHĀ	13-16												
13	ACTION 11	INTERVIEW ASSETS 2												
14	ACTION 12	WEBSITE UPDATE												
	'ELIMA	16-20												
15	ACTION 13				2nd COHORT-OH		2nd-PUBLISH							
16	ACTION 14					2nd Cohort-PLHF		2nd-PUBLISH						
17	ACTION 15				LIBRARY PARTNER SHARING									
18	ACTION 16				PROMOTION CAMPAIGN-2									
	'EONO	21-24												
19	ACTION 17									USER REVIEW				
20	ACTION 18									INTERNAL REVIEW				
21	ACTION 19										FINAL REPORT			



## DIGITAL PRODUCT FORM

### INTRODUCTION

The Institute of Museum and Library Services (IMLS) is committed to expanding public access to digital products that are created using federal funds. This includes (1) digitized and born-digital content, resources, or assets; (2) software; and (3) research data (see below for more specific examples). Excluded are preliminary analyses, drafts of papers, plans for future research, peer-review assessments, and communications with colleagues.

The digital products you create with IMLS funding require effective stewardship to protect and enhance their value, and they should be freely and readily available for use and reuse 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

If you propose to create digital products in the course of your IMLS-funded project, you must first provide answers to the questions in **SECTION I: INTELLECTUAL PROPERTY RIGHTS AND PERMISSIONS**. Then consider which of the following types of digital products you will create in your project, and complete each section of the form that is applicable.

#### **SECTION II: DIGITAL CONTENT, RESOURCES, OR ASSETS**

Complete this section if your project will create digital content, resources, or assets. These include both digitized and born-digital products created by individuals, project teams, or through community gatherings during your project. Examples include, but are not limited to, still images, audio files, moving images, microfilm, object inventories, object catalogs, artworks, books, posters, curricula, field books, maps, notebooks, scientific labels, metadata schema, charts, tables, drawings, workflows, and teacher toolkits. Your project may involve making these materials available through public or access-controlled websites, kiosks, or live or recorded programs.

#### **SECTION III: SOFTWARE**

Complete this section if your project will create software, including any source code, algorithms, applications, and digital tools plus the accompanying documentation created by you during your project.

#### **SECTION IV: RESEARCH DATA**

Complete this section if your project will create research data, including recorded factual information and supporting documentation, commonly accepted as relevant to validating research findings and to supporting scholarly publications.

## **SECTION I: INTELLECTUAL PROPERTY RIGHTS AND PERMISSIONS**

**A.1** We expect applicants seeking federal funds for developing or creating digital products to release these files under open-source licenses to maximize access and promote reuse. What will be the intellectual property status of the digital products (i.e., digital content, resources, or assets; software; research data) you intend to create? What ownership rights will your organization assert over the files you intend to create, and what conditions will you impose on their access and use? Who will hold the copyright(s)? Explain and justify your licensing selections. Identify and explain the license under which you will release the files (e.g., a non-restrictive license such as BSD, GNU, MIT, Creative Commons licenses; RightsStatements.org statements). 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.

**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.

## **SECTION II: 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 digital 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, OBJ, DOC, PDF) you plan to use. If digitizing content, describe the quality standards (e.g., resolution, sampling rate, pixel dimensions) you will use for the files you will create.

### **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. Your plan should 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).

## **Metadata**

**C.1** Describe how you will produce any and all technical, descriptive, administrative, or preservation metadata or linked data. Specify which standards or data models you will use for the metadata structure (e.g., RDF, BIBFRAME, 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).

### **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, delivery enabled by IIIF specifications).

**D.2.** Provide the name(s) and URL(s) (Universal Resource Locator), DOI (Digital Object Identifier), or other persistent identifier for any examples of previous digital content, resources, or assets your organization has created.

## **SECTION III: SOFTWARE**

### **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 or similar functions, and explain how the software you intend to create is different, and justify why those differences are significant and necessary.

### **Technical Information**

**B.1** List the programming languages, platforms, frameworks, 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), URL(s), and/or code repository locations for examples of any previous software your organization has created.

## Access and Use

**C.1** Describe how you will make the software and source code available to the public and/or its intended users.

**C.2** Identify where you will deposit the source code for the software you intend to develop:

Name of publicly accessible source code repository:

URL:

## SECTION IV: RESEARCH DATA

As part of the federal government's commitment to increase access to federally funded research data, Section IV represents the Data Management Plan (DMP) for research proposals and should reflect data management, dissemination, and preservation best practices in the applicant's area of research appropriate to the data that the project will generate.

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

**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 sensitive information? This may include personally identifiable information (PII), confidential information (e.g., trade secrets), or proprietary information. If so, detail the specific steps you will take to protect the information while you prepare it for public release (e.g., anonymizing individual identifiers, data aggregation). If the data will not be released publicly, explain why the data cannot be shared due to the protection of privacy, confidentiality, security, intellectual property, and other rights or requirements.

**A.4** What technical (hardware and/or software) requirements or dependencies would be necessary for understanding retrieving, displaying, processing, or otherwise reusing the data?

**A.5** What documentation (e.g., consent agreements, data documentation, codebooks, metadata, and analytical and procedural information) will you capture or create along with the data? Where will the documentation be stored and in what format(s)? How will you permanently associate and manage the documentation with the data it describes to enable future reuse?

**A.6** What is your plan for managing, disseminating, and preserving data after the completion of the award-funded project?

**A.7** Identify where you will deposit the data:

Name of repository:

URL:

**A.8** When and how frequently will you review this data management plan? How will the implementation be monitored?