

Supporting the Creation of OER with a Code of Best Practices for Fair Use

<https://www.imls.gov/sites/default/files/fy21-ols-lb21-nofo.pdf>

American University Washington College of Law (AUWCL) requests a \$249,905.00 LB21 Project Grant to conduct implementation activities for the recently-released [Code of Best Practices in Fair Use for OER](#) (Code). The goal of the Code is to create a community-based framework for evaluating fair use inclusions that aligns with the professional mission of educators and the predictable legal principles of fair use law. With the release of the Code in February 2021, we begin the core work to foster actual change - including uptake in discipline specific communities and implementation support for institutions and networks. This proposal lays out a set of activities that are tailored to support librarians, authors, and others as they engage with the Code as a tool to understand their work, and to “localize” the higher-level principles in the Code in the activities, norms, and pedagogies of different professional and academic communities. Our team consists of Meredith Jacob, Peter Jaszi, Prue Adler, and Jeselene Andrade, at AUWCL, joined by Will Cross at the NC State University Libraries. The activities proposed over the two years of this grant include training, OER project support, and co-drafted discipline-specific materials designed to engage librarians and build their capacity to use the Code. Engagement with the library community is crucial for the success of the Code and its usefulness to support OER creation, as librarians are part of the key human infrastructure for the creation and adoption of OER.

Statement of Broad Need

In order to expand the reach, impact, and quality of OER, educators must have the ability to incorporate selections from current and relevant materials as objects of critique, illustrations, and resources, even when those materials are protected by copyright. Copyright exceptions such as fair use are critical for creating the most effective and inclusive materials, and in the OER community, uncertainty about fair use and fear about committing copyright infringement lead to overly restrictive practices. The demand for copyright and fair use education in the OER community was demonstrated this spring in the emergency transition to online teaching, when members of this project partnered with others to deliver 15 webinars reaching approximately 2,100 live participants to address questions about fair use and OER.

To meet this need, a team of lawyers, librarians, and open educators has developed a core [Code of Best Practices in Fair Use for OER](#), focusing on questions that come up regularly across disciplines in the creation and modification of OER, and laying out a framework for evaluating fair use inclusions that aligns with the professional mission of educators and the predictable legal principles of fair use law. The Code has been vetted by an outside panel of copyright experts from academia and practice. For the Code to meet the needs of the OER community, however, it must be localized to reflect its application in the activities, norms, and pedagogies of different professional and academic communities.

In previous projects, AUWCL has worked to draft 15 [Codes of Best Practices in Fair Use](#) with communities such as documentary filmmakers, art educators, media literacy teachers, and academic librarians and researchers, to provide them with clear, well-documented, and reliable ways to evaluate fair use. For previous codes, such as the [Code of Best Practices in Fair Use for Academic and Research Libraries](#), the dissemination and outreach phase lasted for almost two years, working to use conference presentations, webinars, and other targeted workshops to reach librarians. The long-term success of a Code is deeply tied to community uptake based on a clear understanding of how to apply the Codes in daily practice. Because the education community is so broad and heterogeneous, our plan for outreach and implementation must “meet” those different professional communities in their existing working groups and discipline specific organizations. A first grade science teacher will understand and use the Code in ways that are distinct from the way a graduate instructor in history might. Examples and explanations grounded in the specifics of individual disciplines are needed to make the Code concrete and meaningful for those practitioners.

To be successful, the Code will also need champions, team-builders, and knowledgeable guides. No community is better-situated to provide these things than librarians, whose expertise in copyright, instructional design, publishing, and OER development has been well-documented and supported as an ongoing priority by funders including IMLS. In order to make the promise of the Code a reality, librarians need not only a seat at the table but clear guidance on how the Code works and how their skills can help apply it in specific contexts.

As we work with OER authors and adopters to implement the Code, we believe that librarians have a unique role in assuring that the document becomes an integrated part of OER practice. Because librarians lead many OER initiatives and serve as formal and informal copyright advisors, outreach and partnership with the librarian community is a key to driving adoption and changing practices. This project will build capacity for both librarians and educators to use the Code and support development of discipline-specific guidance on applying the Code to OER creation and expansion.

Project Design

To support adoption of the Code within the OER community and to provide support for use of the Code in different academic disciplines we will:

1. host a series of online train-the-trainers sessions with existing partners in the library OER community;
2. support discipline-specific teams of educators and librarians using the Code to create or improve OER; and
3. develop implementation materials for applying the Code in specific disciplines.

Our team includes Meredith Jacob, project director for the Copyright and Open Policy Project and Creative Commons USA public lead, Professor Peter Jaszi, professor emeritus of copyright law, and Prue Adler, former Associate Executive Director of the Association of Research Libraries. The team at WCL is joined by Will Cross, the Director of the Copyright & Digital Scholarship Center, NC State University Libraries.

OER Librarian Training

In the first year we will partner with programs (including current IMLS grantees) such as the [Library Copyright Institute](#), [Creative Commons Certificate Program for Educators](#), [Academic Librarians and GLAM](#), the [OEN Certificate in OER Librarianship Program](#), and the [SPARC Open Education Leadership Program](#) to engage campus OER leaders in online trainings aimed at familiarizing an initial cohort of authors as well as OER and copyright librarians with the Code. Our work with these partners will focus on conducting our training and outreach through their

existing networks of librarians, professors, and authors, rather than replicating them. These programs will support and co-host training and integrate training materials into their own training on fair use and OER. These online trainings led by the co-PIs and a set of invited experts will emphasize the value of incorporating third party materials to improve the pedagogy, resilience, and inclusivity of OER. They will also prepare a set of librarians to support OER development teams by leveraging core library expertise and training with the Code. At the end of these trainings, librarians will be well-versed in the Code itself, prepared to explain the Code to peers, and armed with resources and strategies for building or joining an OER development team that benefits from and clearly understands the value of their unique expertise. All training will be done online to address the immediate need to protect participants' health and safety during the pandemic, and to make training available to the widest set of participants.

Discipline-Specific OER Development Fellowships

After this initial training, we will recruit a new cohort of participants designated as OER “Development Fellows” and constituting small, discipline-specific teams in areas such as STEM, language learning, health sciences, and LIS. These teams will include subject experts such as faculty instructors as well as instructional designers and librarians who took part in the training sessions described above. We will support these teams as they use the Code to develop new OER or substantially update and diversify existing high-impact OER over the course of roughly a year. The goal here is to identify and engage librarians, authors, and others who are actively creating OER and to provide them with a peer community and expert technical assistance to tread new ground opened up by fair use and the Code.

The teams supported in OER creation will vary in formality, and may exist at different stages of OER creation projects and enjoy different levels of institutional support. At the outset, they will be asked to identify a gap in their field that could be especially well-addressed by the practices empowered by the Code. In literature and art, relying on fair use might make possible OER projects that previously were unachievable. Other teams might take an existing heavily-used OER that can be significantly improved by practices empowered by the Code, such as updating science textbooks to include a unit on critical reading of popular science journalism. Still other teams might focus on how to cover a specific theme, such as the representation of protest in news media and social media relying on fair use to incorporate real-world sources. In

particular, we hope to support projects that make OER more inclusive in their content by adding images, examples, and pedagogical resources that reflect a more broadly representative set of people, institutions, and exemplary practices.

We believe that supporting creators who are working on actual learning materials will both offer tangible contributions to the field and provide the most meaningful and impactful way to disseminate the Code itself. Pedagogy is at its strongest when grounded in real media, real stories, and real history, rather than recreated, invented examples. This project aims to support that authentic pedagogy by grounding the Code - and the guidance documents described below - in those real situations and materials.

We will help bring these teams together and provide both financial and logistical support for their work, including convening regular monthly online meetings to address each team's copyright challenges and help document their experiences. Projects will be staggered across the two years of this grant so that they have enough variance in the deliverables that early stage projects and late stage projects are all able to participate. Criteria for selecting team-based projects will include the presence of the following:

- (1) Functioning team or community
- (2) Demonstrated need for OER project
- (3) Identified fair use problem
- (4) Potential contribution to the democratization of access to learning
- (5) Potential to promote access to authorship for diverse individuals
- (6) Relationship to critical teaching practices

All project work can be commenced online if needed to address the immediate need to protect participants' health and safety during the pandemic, and can continue in that mode through the project to reduce barriers to participation. At the project outset, we will begin with the assumption that all activities will be conducted through a combination of online workshops and asynchronous online work, and adjust when and if public health guidance and institutional work and travel policies indicate support for resumed in-person meetings.

Discipline-Specific Implementation Documents

In parallel to the OER creation described above, we will provide financial support to Development Fellows to participate in workshops and to contribute to creating

discipline-specific implementation documents, and later to conduct online webinars and conference presentations in the target academic disciplines. Thus, these project teams serve (1) to create new valuable OER, (2) to offer that OER as an example to the community about what is enabled by fair use, and (3) to create a set of discipline-specific guidance documents to complement the core Code. We will employ webinars, a project website, and written materials to present these materials, along with an overview of fair use and OER, and to disseminate training materials (including case studies). The final suite of materials will be brought together and released as a coherent set of openly-licensed resources.

Assessment of this work will be built directly into the project design. The initial librarian-focused training will include evaluation based on participants surveys as well as narrative feedback. The Fellowship program will also conduct formal participant assessment of the training and development process. The final resource packages will be assessed through engagement with the relevant communities. We will also collect data on the impact of our research through standard review of engagement and use such as citations and references in professional presentations.

In a different vein, we will encourage participating OER authors to submit their material to be evaluated through standard metrics including peer review and ratings on platforms such as the Open Textbook Library.

Diversity Plan

OER is often cited as a tool for diversity, equity, and inclusion, but without critical evaluation and empowered concrete work, OER may simply replicate dominant perspectives and existing inequalities. While OER has the potential to enable more fully representational teaching materials, this requires referencing or including existing copyrighted content. The Code is a powerful tool for that work. This project is designed to explicitly address issues of diversity and inclusion and to center underrepresented voices, inviting and supporting diverse participants as developers, instructors, and authors. We have selected partners who share our values and are committed to building teams of Fellows who reflect and enhance the diversity of the communities where they work. We plan to work to support increased diversity, equity and inclusion in three specific ways: 1) by supporting and facilitating the creation teaching materials that incorporate more representative and diverse experiences and examples and 2) by improving

and strengthening the open materials that available to all students and 3) by recruiting contributors who are traditionally underrepresented in teaching material authorship.

The Code itself is designed to be a tool for explicitly supporting a more inclusive and equitable body of OER and pedagogical practices. By facilitating use of materials beyond the universe of Creative Commons licensed materials, the Code creates the opportunity to incorporate materials that reflect the lived experiences of a more diverse set of learners and empowers them to bring their own cultural influences and experience directly into the learning experience.

The project also places a strong emphasis on ensuring accessibility through universal design. One of the core challenges we identified that can be addressed by the Code is the overreliance on linking out to resources that should be included as inserts based on fair use. Members of the OER community who participated in shaping the Code made it clear that linking out is a poor substitute for bringing materials into OER because links often leave students with disabilities at the mercy of external resources who often are not committed to or able to offer reasonable accommodations.

Recent experience has offered a hard reminder about the ways that the digital divide makes linking out an equally problematic option for many including learners in both rural and densely urban areas, who share severely limited broadband with family members, as well for individuals who have been incarcerated. By empowering OER developers to include, rather than link out to materials, these resources will be more resilient and accessible for all learners.

We also intend to make this project more inclusive by providing incentives and support for underrepresented and under-resourced contributors, particularly those in the academy who feel significant pressure to select projects that may receive weight in tenure and promotion decisions. Offering workshop participants financial support is one concrete way we can recognize the labor and expertise that contributors bring and make it easier for them to participate. In addition, we have intentionally framed the Development Fellowship in language that we believe will be useful for early career scholars, who are generally underrepresented as textbook authors. Taken together, this project is designed to offer an invitational, inclusive set of workshops and fellowships in order to empower a diverse set of educators to help OER meet its potential as a vehicle for more equitable educational resources and practices.

Broad Impact

This project will prepare a vanguard of educators and librarians to employ and to explain the Code, so they can engage their own communities in developing more and better OER at a broad scale. Librarians have taken a leading role in the rise and proliferation of OER over the past two decades and their expertise in copyright has been central to the success of the OER movement. This project builds on and sustains that leading role. It provides training to librarians in partnership with leading open education programs like the OEN and SPARC as well as copyright education programs such as the CC Certificate and Library Copyright Institute so they have the latest and best information as well as guidance and materials that prepare them to train colleagues within and beyond the library.

In addition, it will support the development of new and updated open resources that are more complete, more inclusive, and are presented with strong community buy-in. These resources will be targeted towards the disciplines that are in greatest need and best-equipped to benefit from the Code and guided by teams that are prepared to thoughtfully use the Code to center good pedagogy and values of equity and inclusivity. These new and updated resources will directly reduce costs for students and model fair use-enabled open education in the fields where they are situated.

When selecting participants for the work of this grant, we will explicitly look to support projects that engage with crosscutting concerns, such as the role of student co-authorship, critical evaluation of sources and misinformation, and increasing access to authorship for early career authors, women, and people of color. We believe that this project can contribute to a model for supporting OER creation for under-resourced and underrepresented creators with financial, intellectual, and reputational support for the projects and creators who are most needed in these disciplines.

Finally, this project will provide much-needed guidance on applying the Code itself grounded in the context of specific disciplines. Work on prior Codes of Best Practice has demonstrated that the long-term success of a Code is deeply tied to community uptake based on a clear understanding of how to apply the Codes in daily practice. The open education community is as large and diverse as any community for which a Code of Best Practices has been designed. By grounding the Code in the experience of specific disciplinary communities in employing fair

use, the high-level guidance provided by the Code can be made concrete and applicable for the thousands of disciplinary practitioners who build, support, and use OER.

This targeted training will be offered in tandem with the work of the project teams through public events and resources such as blog posts, other online supplementation (e.g. FAQ's), conference presentations, and webinars that invite the larger community to understand and follow, laying the groundwork for larger community adoption of the individual resources and continuing to build awareness and understanding of the Code itself. The project will also connect with the broader library scholarly communication community through engagement with groups such as SPARC and the Association of Research Libraries and integration with programs such as the [Scholarly Communication Notebook](#) (LG-36-19-0021-19) that train scholarly communication librarians. Established community engagement with the work of this grant will pave the way for a positive reception of the final implementation documents which will, in turn, support the next round of Code-enabled OER projects; these, in turn, will provide more clarity and guidance for subsequent projects. Supported by well-trained librarians and engaged communities of practice, these projects will make the Code not just a guiding legal document, but the heart of a new set of open educational teaching and publishing practices that will make the field more dynamic, accessible, and inclusive.



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.

Copyright will remain with the sponsored institution, project team, or creator(s) as appropriate. All materials created with federal funds will be openly licensed using the Creative Commons licenses to reflect the OER community commitment to openness and maximize the reach and impact of this project.

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.

The rights and conditions defined in the Creative Commons licenses will apply. The primary requirement of this license is attribution to the original source and author.

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.

We will include the possibility of submitting contributions anonymously for any contributor who desires to select that choice out of concern for privacy (or any other reason). Creative Commons already includes the right to waive attribution, so that

right will be extended to contribution metadata.

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.

Training materials will include slide decks and recorded presentations as well as related ancillary materials such as handouts and worksheets. Discipline-specific implementation documents will include slide decks and recorded presentations as well as written documents including case studies and discipline-specific guidance on applying the Code.

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.

We will develop content with standard word processing and design tools such as Google docs and Microsoft Word and then share them openly on the web using non-proprietary formats. Other contributors will be free to select the appropriate tools, software, and supplies as long as the final version that is shared is openly accessible.

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.

Standard textual materials will be shared using HTML, Markdown, PDF, and similar open and non-proprietary formats. Multimedia materials will also be shared openly using formats such as FLAC or SVG, as appropriate.

Workflow and Asset Maintenance/Preservation

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

We will follow the workflow as outlined in our schedule of completion. Our timeline for meeting planned tasks will help us monitor and evaluate our progress. Workflow and procedures will be conducted using professional best practices and reviewed and, where appropriate, managed by our Institutional Review Board and Office of Information Technology as well as project leads.

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).

All materials will be hosted on the project site as well as in appropriate OER repositories and standard public sites such as YouTube, depending on content type.

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).

Where appropriate, we will provide metadata and generate documentation that conforms with Data Documentation Initiative (DDI).

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

Metadata will be linked to any data sets we develop and both will be openly shared in appropriate repositories.

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).

We will rely on metadata used by established platforms in the OER community such as the Open Textbook Network and OERCommons

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).

We will rely on the outreach built into the proposal as well as engagement with the

OER community and disciplinary communities through conferences and scholarly articles.

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.

<https://www.wcl.american.edu/impact/initiatives-programs/pijip/impact/best-practices-in-fair-use/best-practices-in-fair-use-for-open-educational-resources/>

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.

We will not be developing any software.

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.

N/A

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.

N/A

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

N/A

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

N/A

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

N/A

B.5 Provide the name(s), URL(s), and/or code repository locations for examples of any previous software your organization has created.

N/A

Access and Use

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

N/A

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:

N/A

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.

We do not intend to collect any research data beyond feedback from developers and users of the resources gathered through webforms, course evaluations, and similar direct communication.

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?

We are not collecting any data within the scope of our IRB.

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.

The project will employ thorough procedures to minimize any risk and protect the participants' confidentiality and anonymity where necessary. Publications about the findings from the study will mask the identity of all participants. Interviews may be digitally recorded; transcripts will be prepared with names and any other personal identifiers anonymized to protect participants. Any survey data will similarly be anonymized.

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

Datasets will be openly shared in nonproprietary formats after appropriate steps are taken to protect any PII.

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?

Any documentation for surveys or assessment materials will be linked to the relevant data sets and stored with the PIs during the project. Once they are

anonymized and ready to be shared they will be shared openly.

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

Any datasets will be stored in an open repository such as the LIS Scholarship Archive (<https://osf.io/preprints/lissa/discover>) or Humanities Commons CORE platform (<https://hcommons.org/core/>).

A.7 Identify where you will deposit the data:

Name of repository: **LIS Scholarship Archive**

URL: **<https://osf.io/preprints/lissa/discover>**

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

We will review this plan at regular intervals throughout the project, particularly as we begin and conduct evaluation and assessment activities.