



LAURA BUSH 21st CENTURY LIBRARIAN PROGRAM

Sample Application RE-259629-OLS-26
Project Category: Planning

University of Washington, The Information School

Amount awarded by IMLS:	\$145,899
Amount of cost share:	\$0

The University of Washington Information School, through its Center for Advances in Libraries, Museums, and Archives, will develop a research and action roadmap for the library, archives, and museum (LAM) sectors. This planning project addresses a field-wide challenge: while libraries, archives, and museums share overlapping research interests and community roles, they lack a unified, evidence-based framework to guide cross-sector inquiry and professional development. The project will convene LAM stakeholders to validate and refine cross-sector research themes, co-design high value research questions, produce a strategic research roadmap, and develop actionable pilot concepts. The resulting roadmap will articulate validated research priorities, clarify areas of shared value and sector distinction, and propose tangible next steps for collaborative applied research, knowledge exchange models, and professional development innovations.

Attached are the following components excerpted from the original application.

- Narrative
- Schedule of Completion

When preparing an application for the next deadline, be sure to follow the instructions in the most recent Notice of Funding Opportunity for the grant program to which you are applying.

An Interdisciplinary Research and Action Roadmap for Libraries, Archives, and Museums

Introduction

The University of Washington Information School requests \$145,899 in funding through a Laura Bush 21st Century Librarian Program planning grant to develop an interdisciplinary research and action roadmap for the library, archives, and museum (LAM) sectors. Through the Information School's Center for Advances in Libraries, Museums, and Archives (CALMA), this 18-month project will engage LAM researchers, educators, and professionals to co-produce a set of validated cross-sector research priorities and recommended action paths for generating evidence, models, and applications that can contribute to advancements in cultural heritage practices, policies, and professional development.

Project Justification

This project seeks to advance LAMs by strategically leveraging their shared research interests to address the rapid developments in the digital and information ecosystems and their impacts on cultural heritage institutions and their communities. A preliminary landscape analysis produced by CALMA last year, [Convergences: Library, Archive, and Museum Collaboration and Future Trends](#),¹ surfaced a deficit in interdisciplinary evidence to validate shared methods and outcomes required for cross-sector exploration, innovation, and workforce development.

The foundation of our nation's shared heritage rests upon three pillars of civic life: libraries, which act as facilitators of knowledge and literacy; archives, which serve as the custodians of records of our histories; and museums, which function as stewards of our material culture. Together these institutions help us understand ourselves, our histories, and the world around us. In their earliest days, the functions, physical spaces, and workforces of LAMs often overlapped. With the educational and economic expansion of the 20th century, however, these core institutions adapted to their growing communities by diverging into specialized silos, each with its own professional identity supported by separate praxes, research, and professional development tracks. The rapid evolution of 21st-century digital and information technologies has sparked scholarly discourse on whether and how cross-sector professional re-alignment, or "convergence," might boost operational efficiencies and increase collective impact for people and communities. There have been case studies documenting examples of libraries, museums, and/or archives integrating their operations, staff, and/or physical structures, such as Ithaka S+R's [Structuring Collaborations: The Opportunities and Challenges of Building Relationships Between Academic Museums and Libraries](#) and OCLC's [Beyond the Siloes of the LAMs: Collaboration Among Libraries, Archives and Museums](#).^{2,3} Some exploration of mechanisms for coordinating nationwide delivery of and access to workforce training across professional silos has been broached, most notably through the 2016 initiative, [National Agenda](#)

¹ <https://hdl.handle.net/1773/54136>

² <https://doi.org/10.18665/sr.314348>,

³ <http://www.oclc.org/research/publications/library/2008/2008-05.pdf>

[for Continuing Education and Development Across Libraries, Archives, and Museums](https://www.oclc.org/research/publications/2016/oclcresearch-national-agenda-lams-education-development-2016.html).⁴

However, there is currently no comprehensive *research framework* that integrates the perspectives and priorities of all three LAM sectors. While professional organizations like the American Library Association (ALA), International Federations of Library Associations (IFLA), American Alliance of Museums (AAM), and Society for American Archivists (SAA) have produced future trend reports and strategic roadmaps, these were developed within and for their sector-specific membership siloes. Nevertheless, these documents reveal overlapping areas of need for an evidentiary base that supports LAMs' vital roles as our nation's cultural heritage and memory institutions. These areas include people-centered topics such as user-centered design, socio-emotional well-being, civic engagement, educational attainment and lifelong learning, and measuring community impact; and, technological topics, such as digital collections and preservation, applications of artificial intelligence and their implications, accessibility, and metadata standardization.

As a center formed in 2024 to build and strengthen connections between librarianship, museology, and archival studies, CALMA has already demonstrated cross-disciplinary interest in some of these overlaps by hosting well-attended programs such as round tables on "Well-being Research for Libraries, Archives, and Museums" and "When Machine Learning Meets Cultural Heritage Collections," and a symposium on "AI and the Future of Holocaust Research & Memory;" all of which included scholars and professionals presenting on applied research and practices from libraries, archives, and museums. Furthermore, our proposed project "walks the talk" of interdisciplinary collaboration, by forming a core project team that weaves together our individual areas of expertise in digital humanities, AI/machine learning, museum studies, and public librarianship.

By co-creating a robust interdisciplinary research roadmap that articulates shared priorities, we can more clearly see paths for new and innovative cross-sector research collaborations and modes of knowledge exchange. These outputs will benefit (1) LAM professional researchers and faculty; (2) LAM institutional leaders; and (3) LAM educators who share the LB21 objective to "develop or enhance professional development and training programs to enable the library and archival workforce to meet the needs of their communities."

Through *an advisory board, facilitated focus groups, and co-designing workshops*, we will engage researchers, educators, and professionals from each sector to:

1. **Validate and refine overlapping research themes:** Review, amend, and expand upon the research themes identified through CALMA's preliminary investigation to ensure they reflect the needs of each discipline and the communities they serve.
2. **Articulate foundational research questions:** Formulate specific, high-impact research questions that drive cross-sector inquiry.
3. **Prioritize strategic initiatives:** Develop a roadmap to identify which research areas yield the highest mutual value proposition.

⁴ <https://www.oclc.org/research/publications/2016/oclcresearch-national-agenda-lams-education-development-2016.html>

4. **Develop an action plan:** Devise a set of recommendations for follow-on initiatives, which may include (1) project concepts for collaborative applied research initiatives; (2) programming for cross-sector knowledge exchange (e.g., conference panels and discussions, symposia, publications); and (3) models and partnerships for expanding interdisciplinary professional development for the LAM workforce.

By focusing on knowledge-centered collaboration rather than operational integration, this project ensures that each LAM sector retains its unique professional identity while gaining the strategic advantages of a coordinated, multi-disciplinary approach to research and professional development. This positions the cultural heritage field to innovate and address our grand societal challenges with greater impact.

Project Work Plan

The project is structured as an 18-month planning initiative delivered through three phases of activity between September 1, 2026, and February 29, 2028.

Phase 1: Validate, Refine, and Prioritize Themes (Months 1–6). We will gather experts from across the three sectors to build upon and refine the findings from our preliminary landscape analysis to identify the themes for the interdisciplinary research roadmap. Activities in this phase include the following:

1. Convene the Advisory Board. During a one-day meeting held at the UW Seattle campus, the project team and advisory board will review project strategy and develop a recruitment list of academic researchers, institutional leaders, policy makers and thought leaders from across the sectors to invite to focus groups. Because the advisory board will be composed of individuals who come from the different cultural heritage sectors, it will be important to gather this group in person so that they can build a strong base for communication and rapport.
2. Conduct three virtual focus groups. We will use these 1.5 to 2-hour sessions to ground-truth CALMA's initial landscape review of LAM convergence, identify gaps and roadblocks, address terminology issues and surface essential disciplinary distinctions. We will draw from the recruitment list generated with the advisory board to form three groups of 5 to 8 participants each. One group will be composed of library leaders and scholars, one of archives leaders and scholars, and one of museum leaders and scholars. In preparation for each session, participants will be provided with pre-reading material (a short summary of the landscape review's themes, a starter list of terms that appear across the disciplines, and a concept map of the themes and findings) and will be asked to respond to 1-3 reflection questions about the overlaps and disconnects between the sectors. Focus group design will be submitted for IRB approval prior to these events.
3. Host a cross-sector virtual focus group. We will select 6-9 selected representatives from the previous three sessions for a final group group designed to validate the converged research areas and identify which offer the most mutual value proposition. In preparation for the session, the participants will be provided with a structured summary of the focus group findings and will be asked to complete a brief survey to make an initial ranking of

research areas. At the outset of the two-hour session, the group will define the “mutual value proposition” against which the research areas can then be considered, rated, and ranked. We will consolidate the focus group data into a thematic and prioritized research agenda and circulate to the Advisory Board for feedback and revisions. The finalized version will be used as the foundation for the next phase of activities.

Phase 2: Co-Design Strategic Research Roadmap (Months 7–12): Using a combination of in-person and virtual workshops, we will transform the validated thematic agenda developed in Phase 1 into specific, high-priority research questions and draft the roadmap. Activities in this phase include the following:

1. Host an in-person workshop. We will gather the Advisory Board and 8–10 key champions who are drawn from the previous phase, either from being focus group participants or people who emerged from those discussions, to draft “big picture” research questions for the prioritized research themes developed in Phase 1. Prior to the workshop, participants will be provided with the research agenda briefing and a survey to rank their top themes for greatest cross-sector value and reflections on emergent big questions. The workshop will start with 5-7 lightning talks by workshop participants to seed the conversation. In breakout groups, participants will develop two or three “big questions” for each of two research themes. As a full group, the questions will be further developed and refined through progressive questioning, then combined or prioritized in terms of their mutual value and feasibility. For the final half day, the focus will be on refining one or more of the big questions into applied research inquiries that can inform specific recommendations. Breakout groups will apply precision tuning methods to articulate details such as the purpose, scope, potential approaches, resources, beneficiaries, risks, and success measures related to that question. This workshop will be hosted at the UW Seattle campus over 1.5 days.
2. Host up to three facilitated virtual workshops for a broader group of 25–50 LAM stakeholders who have not participated in the project to date, to continue to refine the questions into applied research inquiries that can inform specific recommendations for follow-on projects. The activities will be similar to those facilitated during the final half-day of the in-person workshop, with sessions up to 3 hours each. The number and focus of each virtual workshop will be determined based on the breadth of prioritized questions formulated during the in-person workshop.
3. Finalize the Strategic Research Roadmap. With consultation from the Advisory Board, we will finalize the highest-ranking articulated research questions based on their potential for mutual sectoral benefit, and incorporate the findings into a Strategic Research Roadmap. This roadmap will be used as the foundation for the next phase.

Phase 3: Recommend Follow-on Pilots and Projects (Months 13–18). This phase focuses on developing blueprints for actual cross-sector initiatives, and publicly disseminating the final roadmap.

1. Draft high-level project concepts for the top-ranked research questions. For example, project concepts could include developing research consortia surrounding AI within LAM contexts, as supported through CALMA-hosted events. We believe there to be immense opportunities bridging LAM and iSchool contexts to further these goals.
2. Document pilot concepts for new or updated modes of knowledge exchange. These modes could include ideas for thematic conferences designed for a cross-LAM audience; research symposia that bring together scholars from across the LAM disciplines, or opportunities for cross-sector panels at national association events. Experiences gleaned from previous CALMA-hosted events (examples provided in the Project Justification section above), the [Library, Archives and Museum Conference Exchange project](#)⁵ and former [IMLS WebWise Conference](#)⁶ could be applied toward the development of these pilots.
3. Explore with selected professional associations and other CE providers the possibilities for mapping overlapping competencies and developing integrated, high-value CE/PD. This could build upon some of the specific strategies documented in the 2018 report, *National Agenda for Continued Education and Professional Development across Libraries, Archives and Museums*.
4. Consolidate all pilot designs and the prioritized agenda into a published LAM Research and Action Roadmap. The publication will be hosted on the CALMA website (<https://calma.ischool.uw.edu/>) and be stored in the UW Library institutional repository, [ResearchWorks](#).⁷
5. Communicate findings to the broader LAM community. CALMA will host a public webinar, post information to internal and external listservs, and will submit proposals to present at national industry events, such as annual conferences of major professional organizations as well as iSchool venues such as ASIS&T.

Project Management and Staffing

This project will be directed through the Center for Advances in Libraries, Museums, and Archives (CALMA), which formally launched in 2024 and is hosted by University of Washington Information School in partnership with UW Libraries. CALMA is the first-ever university-based center and Organized Research Unit to encompass the breadth of the cultural heritage field and focus on bridging LAM research, education, and practice. As Project Director (PD), Sharon Streams, CALMA's founding Director of Strategy and Operations, will oversee the project and staff through all phases of activity. Ms. Streams has led more than a dozen national-scale projects designed to advance LAM institutions; and is the former director of a nationwide CE/PD program (WebJunction) for librarians and library staff. As co-PDs, Information School Assistant Professor Benjamin C.G. Lee and Information School Teaching Professor Jessica Luke will inform the strategy and frameworks for the stakeholder engagement activities, analysis and

⁵ <https://www.oclc.org/research/publications/2017/oclcresearch-collective-wisdom-lam-culture.html>

⁶ <https://www.imls.gov/issues/national-initiatives/webwise>

⁷ <https://digital.lib.washington.edu/researchworks/home>

synthesis of those inputs, and development of the primary outputs. Lee will bring his experience researching AI in LAMs and convening nationwide conversations around this topic, informed by his time as an Innovator in Residence and Kluge Fellow in Digital Studies at the Library of Congress, as well as a Digital Humanities Fellow at the United States Holocaust Memorial Museum. Luke will bring her more than two decades of experience studying learning and wellbeing in museums. She has served as co-PI on multiple national grants, and facilitated large-scale research agenda projects such as this one. Brandon Locke, CALMA Program Manager, will manage the day-to-day project activities, logistics, publications, and communications. Locke brings more than a decade of experience coordinating LAM research, teaching, and professional development projects. He served as project manager for the Library Publishing Workflows project (LG-36-19-0133-19).

A student from the Information School's MLIS or Museology program will gain hands-on experience with codesign research methods by joining the project as a research assistant for two academic quarters to support the gathering and synthesis of the stakeholder input generated by the focus groups and workshops. Resumes for key personnel and a position description for the graduate research assistant are included as supporting documentation.

The project activities rely on a broad representation of LAM stakeholders who will participate in focus groups and working sessions. The project's Advisory Board will be composed of five highly networked LAM leaders who will ensure we reach and engage LAM researchers, educators, and professionals from a wide geographical and institutional range. At the time of this proposal, the following individuals have agreed to participate in this role:

- Shannon Mattern, who is Director of Creative Research at Metropolitan New York Library Council and previously Professor of Media Studies, Art History and Anthropology at The New School + University of Pennsylvania
- Tracie D. Hall, who was the Information School's most recent Professor of Practice and Distinguished Practitioner in Residence and is now Executive Director of HBCU Library Alliance
- Chela Scott Weber, a certified archivist with deep experience leading programs in archives, research libraries, and other cultural institutions, and former Senior Program Officer with the OCLC Research Library Partnership
- Martin Storksdieck, who is director of the STEM Research Center at Oregon State University with applied research on STEM education and science engagement through children's museums and science centers.

Evaluation and Impact

By producing a research roadmap with an action plan for specific activities to advance LAM theory and practice, this project contributes to the LB21 Program Goal 2 to "Train and retain current library and archives professionals, faculty, and staff" and its Objective 2.1 "Develop or enhance professional development and training programs to enable the library and archival workforce to meet the needs of their communities." The project budget and schedule is pragmatic and makes use of CALMA's resources as a center embedded in an Information School that has been cultivating new connections between LAM scholars and professionals, and has the

resources and skills for convening and facilitating both virtual and in-person sessions with these audiences. Through its co-design methods that will incorporate input from dozens of LAM professionals, educators, researchers, and leaders, we are ensuring that the outputs reflect the real needs and perspectives of those who will benefit from having such a plan. We will evaluate the project's near-term outcomes based on the four key measures of *effectiveness*, *efficiency*, *quality*, and *timeliness*, through the data collection methods described in the Performance Measurement plan. The longer-term impact of the roadmap will be gauged by its uptick by LAM educators, researchers, leaders, and funders, as measured by the types and levels of follow-through on the action plan, such as new grant proposals or revised calls for proposals, MOUs for new cross-LAM partnerships, announcements of new conference formats or acceptance of cross-LAM programmatic submissions, new integrations of MLIS or Museum Studies coursework, or development of a LAM certificate in Master's degree or continuing education programs.

Project Results

By its completion, the project will have produced and made publicly available three primary outputs:

1. **A LAM Research Agenda:** A validated set of high-priority research themes and specific questions that have been ground-truthed by experts across all three sectors. This provides a reference point for interdisciplinary scholarly and applied inquiry.
2. **Strategic Research Roadmap:** A prioritized guide that identifies the highest-value opportunities for cross-sector collaboration and the professional distinctions that will need to be navigated and preserved. This roadmap provides a pathway for the professions to move from isolated examples of convergence to a coordinated national strategy for enabling the LAM workforce to meet the needs of their communities.
3. **Action Plans:** A set of recommendations for follow-on projects, including applied research initiatives, knowledge exchange models, and professional development innovations.

These outputs will be developed in collaboration with the dozens of LAM stakeholders who will be engaged over the three phases of activity described above. This approach will ensure that the roadmap reflects the perspectives, needs, and terminologies of those for whom the information is intended. We will be working across deeply siloed sectors composed of scholars and professionals, so the project is designed to foster greater understanding across the sectors of both the common ground they share and the important disciplinary distinctions that must be preserved. The phases are intended to move us collectively from a broad and hazy concept of “converged areas of research interests” to a set of actionable steps, people, and organizations that can leverage those convergences to develop new research projects and new modes of knowledge exchange that will prepare and advance the professional workforce.

As a Center dedicated to forging and strengthening connections across librarianship, museology, and archival studies that can advance the cultural heritage fields, CALMA is invested in sustaining and building on the Roadmap. It will be disseminated through CALMA's professional

and scholarly networks, through those of Advisory Board members, and to the array of stakeholders engaged through the planning phases. We will present the findings to faculty and leadership of the Information School, for consideration of how the Roadmap might be incorporated into MLIS and Museology curricula, inform development of the school's new MLIS/MUSE concurrent degree, outline an approach to a LAM Certificate program, and be leveraged as continuing educational resource for emerging LAM professionals. The Roadmap will be retained as a CALMA digital resource via the center's website and its collection within the UW Library institutional repository, ResearchWorks. CALMA will host public programming about the planning grant's findings and will seek opportunities to present at industry conferences such as those hosted by AAM, ALA, SAA, iSchools Organization, and ASIS&T.

University of Washington Information School - 2026 IMLS LB21 planning grant

Schedule of Completion

September 1, 2026 - February 29, 2028

Year 1

Activity	Sep-26	Oct-26	Nov-26	Dec-26	Jan-27	Feb-27	Mar-27	Apr-27	May-27	Jun-27	Jul-27	Aug-27
Phase 1: Validation and Refinement												
Convene Advisory Board												
Lead three virtual focus groups												
Lead cross-sector virtual focus group												
Synthesize into research agenda												
Phase 2: Strategic Research Roadmap												
Host in-person workshop												
Facilitate virtual workshops												
Synthesize into strategic research roadmap												

Year 2

Activity	Sep-27	Oct-27	Nov-27	Dec-27	Jan-28	Feb-28
Phase 3: Recommended Action Plans						
Develop applied research project concepts						
Prototype knowledge-exchange events						
Identify cross-sector CE/PD opportunities						
Consolidate into final Roadmap						
Publish and disseminate broadly						