

*Creating Local Linkages:
Training Public Librarians to Facilitate Doing Digital Local History*
Proposal submitted by the Roy Rosenzweig Center for History and New Media

“What we need to do is involve the people in our communities, not only in knowing about the local past, but also in understanding how we have arrived at knowing what we know.”¹

Genealogy and family history is the major facet of public interest in the past, and public libraries are a logical choice for patrons interested in starting this kind of research. They hold local collections, research space, and internet access. In ideal circumstances, those public libraries would also be able to offer their patrons the opportunity to consult with and learn from a librarian who is equipped with the research and historical thinking skill necessary to support the community in doing local history.

This nexus of interest in history and public library resources represents a major opportunity to connect the public to the complexities of their local history, and to their local public library’s collections, anchoring communities through a shared investigation of the past. But, only if public librarians have the skills to help their patrons make sense of the primary and secondary historical materials at their disposal. Moving beyond the narrow focus on family lineage to address larger questions of migration, economic development, politics, race and ethnicity, leisure, religion, and cultural phenomenon through library services that facilitate local history work can increase opportunities for lifelong learning, community engagement, and patrons’ connections to place and to one another. Unfortunately, far too few public library professionals are prepared to fully support their patrons in undertaking this kind of exploration, and in taking advantage of the digital tools and resources available to assist them.

With a twenty-year track record of using the web to improve the teaching and learning of history, and in professional development training, the [Roy Rosenzweig Center for History and New Media](#) (RRCHNM) at [George Mason University](#) (Mason) is perfectly positioned to provide the professional development that public librarians need to support vibrant local history work among their patrons. Building on an extensive experience training mid-career professionals in the theory and methods of digital history, RRCHNM is seeking a Laura Bush 21st Century Librarians grant from the Institute of Museum and Library Services to support *Creating Local Linkages: Training Public Librarians to Facilitate Doing Digital Local History*. This project will introduce public librarians to a range of historical research methods and digital history skills, and teach them how to train others in those skills with the goal of helping their patrons to broaden their historical work to include local and community history. The work will include:

- 1) creating a robust open-access online curriculum, consisting of five modules, that will introduce public librarians to the core elements of researching and publishing local history using digital tools;**
- 2) teaching an online course 4 times that uses that curriculum to certify public librarians as skilled in doing digital local history;**
- 3) leading 4 full-day face-to-face workshops over 2 years on doing local digital history in public libraries; and**
- 4) authoring and publishing a guide for librarians to support public programming to teach library patrons historical methods.**

These activities will **train at least 300 public librarians** to better work with their own collections, and also to do significant local history programming with their constituents.

¹ Carol Kammen and Bob Beatty, *Zen and the Art of Local History* (Lanham: Rowman & Littlefield Publishers, 2014), 4.

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1. Statement of Need

Railroad enthusiasts, genealogists, and collectors are doing history work everyday as they research minutia of the things they love, but they can easily lose sight of the bigger picture and contexts of how communities grow and change, how commercial networks are constructed, and how laws and social practices shape private family decisions. In their groundbreaking study published in 1998, historians Roy Rosenzweig and David Thelen found that Americans were engaged with their pasts on a regular basis, doing that type of work, but more commonly by looking directly to their personal, familial pasts, to make sense of their present circumstances. Respondents, representing different racial and ethnic groups, were constructing historical narratives of their own making that represented change over time but that often did not rely on a diverse set of sources for drawing those conclusions.² In this way, the public's engagement with history was not nearly as rich as it might have been if they'd connected with a wider range of sources and historical narratives.

Even more so now than when Rosenzweig and Thelen made their initial survey, genealogy is the place where many people begin and end their engagement with history. Recently, online databases of public records have made genealogical research easier and more accessible than ever before for the Internet-using public. The desire to reconstruct family histories can begin in different places: sitting around the dinner table talking to older relatives, browsing through family photo albums, visiting a local history museum, or watching television programs such as "Who Do You Think You Are?" and "Faces of America." These programs take viewers on a journey to libraries, archives, and online databases to uncover the family trees of public figures. Framed as a series of mysteries to be solved, genealogists aid individuals in discovering the stories of their families while historians contextualize the pieces of evidence.

Resources for doing family history abound, but are also limited in scope. The National Archives and Records Administration (NARA) has seen an increase in use of and requests for their records by genealogists. They recently created a [portal for starting family history research](#), by creating guides for finding federal records and tips for using online research tools and databases. For those seeking guidance in finding family members and connecting with other genealogists, a subscription to Ancestry.com might offer the simplest way to begin. Ancestry.com's user interface design begins with building a family tree and constructing it is the ultimate goal of most members. Furthermore, the public has access to an unprecedented store of historical sources. Everyday more and more items, often from state and local collections, are digitized and integrated into key major access portals: pioneers in digital access, the Library of Congress offered the public access to more than 45 million [online primary sources](#) (as of 2013); in its first three years, the [Digital Public Library of America](#) (DPLA) has aggregated access to nearly 15 million digital items for 2,000 contributing institutions around the country; and NARA has [over 2 million digitized copies of historical documents and photographs](#). Thus, members of the general public are swimming in a sea of decontextualized digital primary sources, with minimal resources to grapple with that abundance.

Despite the allure of the television scenes from popular programs, most Americans do not have the resources of Hollywood producers and access to historians to make and contextualize dramatic discoveries in their personal histories. But, this popular interest in family history need not end with the family tree. Historian Carol Kammen encourages all those engaged in local history work, which includes the thousands of public librarians across the US, to invite history enthusiasts in their communities into the processes of historical thinking and researching the local past.³ There is more to doing history than locating individual people in census, immigration, and military records. Understanding and comparing different types of evidence, seeking out secondary sources for contextualization, and synthesizing primary and secondary sources are essential pieces of history work that are not processes taught by Ancestry.com or other genealogical guides. To truly grapple with historical context and meaning, patrons need to learn the habits of mind that are second nature for practicing historians: questioning the

² Roy Rosenzweig and David Thelen, *The Presence of the Past: Popular Uses of History in American Life* (New York: Columbia University Press, 1998), 63, 188-9.

³ Kammen, *Zen and the Art of Local History*, 4-5.

circumstances and point of view of a source's creation, building a larger contextual framework to interpret the sources meaning, reading sources in comparison with one another, and considering the import of multiple perspectives, multiple causation, and change over time for understanding the past.

More often than not, genealogists end up at the reference desk at their local public library. The nation's nearly 9,000 public libraries and 138,000 public librarians serve more than 95 percent of the total US population and continue to serve as a community anchor in the digital age. The *Public Library Service Responses* report details the most common programs provided by libraries across the US, including doing local history and family research, categorized as "discover your roots," "celebrate diversity," and "connect to the online world." Demand continues to increase for library programs, computer and internet access, and physical and digital resources. As a report from the Internet Policy and Access Center at the University of Maryland on digital literacy work in public libraries has explained, "That the public library is the only, or one of few, community resources addressing these issues means librarians often must combine digital literacy instruction with other services." The US IMPACT study notes how well libraries help "bridge the digital divide" by offering internet access and workshops teaching digital literacy skills, but there currently are limits to the variety of services that libraries can offer.⁵

Larger public libraries have some internal capacity for teaching digital literacy skills and for creating digital resources by digitizing their special collections and creating online content to share with their communities. In smaller libraries with little digital infrastructure, not all librarians possess the skills to create digital collections or to build digital histories with those local history collections. With the help of the Bill and Melinda Gates Foundation, the DPLA has made initial headway on this front through its Public Library Partnerships Project by providing a pilot program of training for public librarians on digital preservation and access through four of DPLA's content hubs.⁶ The logical next step is to build capacity beyond those four hubs (Georgia, Utah, Minnesota, and Mountain West), among public librarians from all regions to help their patrons harness the ever-expanding universe of digitized sources in the service of research and telling local history. *Creating Local Linkages* will offer a route to equip those public librarians with the knowledge, skills, and methods that they need to support meaningful local history work among their patrons.

2. Project Design

The work of *Creating Local Linkages* will result in four deliverables, accomplished over the course of three years.

Deliverable 1: We will create **an asynchronous web-based curriculum consisting of 5 modules** designed to teach and practice digital local history methods using primary and secondary sources found in participants' own libraries and in open digital collections, and to create an online narrative exhibition using [Omeka.net](http://omeka.net). Using the popular content management system [WordPress](http://wordpress.org) as a core infrastructure with the addition of the popular [Commons-in-a-Box](http://commons.in-a-box.org) plugin suite for community interaction, the course management system will enable efficient, open, and lightweight content delivery. Based on lessons learned from RRCHNM's significant experience creating professional development materials (See *Appendix B: Sample Digital History Curricula and Training Materials*), each curriculum module will contain introductory videos/screencasts, step-by-step web tutorials, and readings. As an open educational resource released under Creative Commons licensing (CC-BY 4.0), these materials will be available

⁴ For an introduction to the cognitive psychology of historical thinking, see Sam Wineburg, *Historical Thinking and Other Unnatural Acts: Charting the Future of Teaching the Past* (Philadelphia, PA: Temple University Press, 2001).

⁵ *Public Libraries in the United States Survey: Fiscal Year 2013* (Washington, DC: Institute of Museum and Library Services, 2016). June Garcia and Sandra Nelson, *Public Library Service Responses 2007*, (Public Library Association, 2007); Information and Policy Center, "Digital Literacy & Public Libraries Survey" (College Park, University of Maryland, 2013); Becker, Samantha, Michael D. Crandall, Karen E. Fisher, Rebecca Blakewood, Bo Kinney, and Cadi Russell-Sauvé, "Opportunity for All: How Library Policies and Practices Impact Public Internet Access" (IMLS-2011-RES-01) (Washington, DC: Institute of Museum and Library Services, 2011).

⁶ DPLA Public Library Partnership program, <http://dp.la/info/about/projects/public-library-partnerships/>

to any interested librarian, at any time, who will have the freedom to complete any or all of the modules that might fill their individual training needs.

Module 1: What is Digital Local History? [Instruction duration: one week]: The module segments will include:

- Introduction to the sources and practice of local history
- Introduction to historical thinking skills
- Introduction to Omeka.net

Module 2: Locating local history primary sources [Instruction duration: one week]: The module segments will include:

- Navigating the American Memory Collection at the Library of Congress, the National Archives and Records Administration, the Digital Public Library of America, the Internet Archive, the Library of Congress's Chronicling America digital newspaper collection, and major state and local digital library collections
- Addressing access, permissions, and usage rights
- Working with analog sources, including the basics of digitization, preservation, and metadata standards
- Managing research materials with Zotero

Module 3: Analyzing primary sources [Instruction duration: two weeks]: The module segments will include guided introductions to working with and comparing different types of primary sources. These segments will be modeled on RRCHNM's existing successful introductions, including the teachinghistory.org "Best Practices" materials, the [History Matters "Making Sense of Evidence" modules](#), and the [World History Sources "Unpacking Evidence" modules](#). These modules will focus on teaching key historical thinking skills such as sourcing, contextualizing, close reading, and corroboration – skill not usually included in genealogy training.

Module 4: Building a local, regional, and state context for historical research [Instruction duration: two weeks]: This module will introduce participants to the process of moving from the narrow bounds of individual sources to the wider field of social, cultural, economic, and political forces that influence local history. Additionally, participants will learn to assess the range of interpretations and perspectives in current historical scholarship. Module segments will include:

- Surveying the field for secondary resources
- Assembling key elements to develop local, regional, and national contexts
- Evaluating historical interpretation and entering into the conversation about the past

Module 5: Forming an argument about the past using digital history tools [Instruction duration: two weeks]: This final module will equip participants with the skills to bring their research and analysis of the primary sources and secondary literature into the digital realm as a well-constructed online exhibit. The module segments will include:

- Planning and building a digital history exhibit using Omeka.net
- Annotating individual sources
- Integrating primary and secondary source research
- Presenting history in time and space
- Doing collaborative digital history work

Deliverable 2: We will offer an **eight-week course 4 times** (2018-2020), in which public librarians can complete the curriculum under the supervision of RRCHNM historians using online forums for discussion and consultation with faculty and other participants. Course participants will complete and submit a significant assignment to accompany each module for assessment and feedback from RRCHNM historians:

- Assignment for Module 1: Draft a proposal for a digital local history project
- Assignment for Module 2: Build a collection of primary sources

- Assignment for Module 3: Create descriptive analysis of those sources
- Assignment for Module 4: Assemble an annotated bibliography and write context briefs for the primary sources in the collection
- Assignment for Module 5: Build a digital local history exhibit

Each course will serve up to 50 public librarians (totaling 200), and participants who successfully complete all five assessments will receive a certificate of completion from RRCHNM.

During the course terms, the Commons-in-a-Box suite will offer a full set of social features that will allow the geographically disbursed course participants to work together and share their insights during and long after their *Creating Local Linkages* experience. This community of learners will grow with each cohort and will contribute to the ongoing support and sustenance of the participants as they work with their local communities. RRCHNM commits to maintain the curriculum and the social platform long beyond the close of the grant period to allow the community to thrive and expand as others use the curriculum.

Deliverable 3: To supplement the online course, we will offer **4 face-to-face workshops**, two of which will coincide with the Public Library Association Annual Meeting (2019-20), that address the logistical work of implementing local history programming. Each of these full-day workshops will serve 25 people (Totaling 100). During 2018-2019, the workshops will introduce the digital local history curriculum and offer participants an opportunity to engage in discussion with public history practitioners about the challenges of doing local history. The second set of workshops, during 2019-2020, will focus on the technical skills necessary to do and publicize local history work with the public, including basic introductions to blogging, collecting evidence of the recent past using digital means, building digital history exhibits, and developing community through social media and outreach strategies.

Deliverable 4: We will publish a *Guide to Teaching Local Digital History Methods*. This guide will accompany the basic curriculum modules, providing the key framing and support materials necessary to adapt them for public programming in local library settings. Thus, the course modules will be available to train librarians, and then in turn, the same staff members will be able to use the modules to support their patrons in learning to do digital local history.

Plan of Work

RRCHNM has significant experience designing and managing the delivery of training for mid-career professionals. The primary means for tracking and managing individual tasks and deliverables for the project will take place using the Basecamp project management software, and the project team will meet bi-monthly to review the project status, plan for the next period of performance, and to resolve any issues that might be preventing forward movement on the work. Using this process, *Creating Local Linkages* team will work over the course of three years to achieve the projects core deliverables (*See Schedule of Completion*).

Year 1 (June 1, 2017 to May 31, 2018) activities will include:

- Design of the curriculum content for the five modules outlined above
- Design certification assessment elements
- Design and Development of the course management system using WordPress and Commons-in-a-Box
- Begin adapting curriculum materials for course participants to use with patrons
- Review course curriculum materials with Advisory Board
- Begin Publicity and Outreach for first round of courses and workshops
- Open course registration form

Year 2 (June 1, 2018 to May 31, 2019) activities will include:

- Course Session 1 (September 15 to November 15, 2018) for at least 50 participants
 - Administer pre- and post-course qualitative survey to assess learning outcomes for Cohort 1
 - Review of initial course outcomes and revision of curriculum as necessary
- Workshop for 25 participants to coincide with the Public Librarians Association Annual Meeting
- Course Session 2 (April 1 to May 31, 2019) for at least 50 participants
 - Administer pre- and post-course qualitative survey to assess learning outcomes for Cohort 2
 - Review of second course outcomes and revision of curriculum as necessary
- Workshop for 25 participants (geographically distant from PLA meeting location)
- Pilot and revise patron curriculum materials
- Draft *Guide to Teaching Local Digital History Methods*
- Review course results and evaluation, and patron curriculum materials with Advisory Board
- Publicity and Outreach

Year 3 (June 1, 2019 to May 31, 2020) activities will include:

- Course Session 3 (September 15 to November 15, 2019) for at least 50 participants
 - Administer pre- and post-course qualitative survey to assess learning outcomes for Cohort 3
- Workshop for 25 participants to coincide with PLA Annual Meeting
- Course Session 4 (February 1 to March 31, 2020) for at least 50 participants
 - Administer pre- and post-course qualitative survey to assess learning outcomes for Cohort 4
- Workshop for 25 participants (geographically distant from PLA meeting location)
- Publish patron curriculum materials
- Review *Guide to Teaching Local Digital History Methods* with Advisory Board
- Revise and publish *Guide to Teaching Local Digital History Methods*
- Publicity and Outreach

Communication Plan

The first route of communication for the *Creating Local Linkages* project will involve drawing on the support of the Public Library Association (*See Appendix A: Letters of Support and Commitment*). As a division of the American Library Association, PLA serves the nation's public librarians with a vibrant annual meeting and range of initiatives that target digital literacy and community engagement. Through a strong relationship with PLA, we will be able to target outreach and publicity materials directly to more than 9,000 public librarians, inviting them to sign up for the online courses, to participate in the face-to-face workshops, and/or to make use of the open educational resource we produce. We have included \$3,000 for publicity and outreach to attract public librarians to the courses and workshops.

The second route of communication will be to leverage the strong networks of local libraries and librarians that have grown up around the DPLA Service Hubs. The DPLA has agreed to share staff resources (an \$27,000 in-kind contribution) and contacts through the period of the project to facilitate the development of relationships between the *Creating Local Linkages* team and DPLA Service Hub participants (*See Appendix A: Letters of Support and Commitment*). These local figures will be key in identifying networks to target for outreach and publicity materials.

RRCHNM has proven expertise in both outreach to museum and library communities and web development. RRCHNM's ability to reach museum, library, and related audiences is proven by its long track record of delivering tools and resources to these groups. RRCHNM's websites receive more than 19 million unique visitors each year, and more than one million cultural heritage professionals and scholars use RRCHNM's tools. To drive interest in the this online course, we will seek support from IMLS's Public Affairs department to advertise the online course with IMLS members and readers of the UPNext Blog. We will post announcements to library and archive listservs and websites, and we will also make use of the vast opportunities for electronic social networking

available to us. In addition to electronic outreach, we will reach out directly to libraries and archives, building on strong relationships with institutions and extensive personal networks of collaborators and partners.

Project Team, Partners, and Advisory Board

The work of the project will be accomplished by the following staff:

- *Dr. Sheila Brennan* (Principal Investigator) is Director of Strategic Initiatives at RRCHNM and Research Associate Professor of History at George Mason University. A nationally known expert in digital public history, Brennan will be responsible for the overall direction and vision for the project. She will particularly focus her attention on curriculum development and instruction. Additionally, she will plan and coordinate of the four workshops. Brennan will team teach the four certification courses with Leon. Brennan will be a primary author of the *Guide to Teaching Local Digital History Methods*. Brennan will devote 25% of her overall time to this work.
- *Dr. Sharon Leon* is Director of Public Projects at RRCHNM and Associate Professor of History at George Mason University. With a decade of experience in teaching historical thinking skills and professional development work, Leon will plan and coordinate of the four workshops. Leon will co-author the *Guide to Teaching Local Digital History Methods* with Brennan. Finally, she will team teach the four certification courses with Brennan. Leon will offer 35% of her academic year time to this work as an in-kind contribution in the second and third year, and she will charge 30% of her summer time to the project in the final two years.
- *Dr. Stephen Robertson* (In-kind) is Director of RRCHNM and Professor of History at George Mason University. Well known for his work on the award-winning *Digital Harlem* project, Robertson will contribute his historical expertise on working with concentrated local history sources to the development of the curriculum, particularly working on the 2nd, 3rd, and 4th modules. Additionally, Robertson will contribute his expertise on local and digital history to the four workshops in 2019 and 2020. Robertson will offer 15% of his academic year time to this work.
- *Megan Brett* (Online Teaching Assistant and Outreach Lead) is a Digital History Associate at RRCHNM and doctoral student in the George Mason University's Department of History and Art History. Brett will collaborate with Leon, Brennan, and Robertson to create the screencasts, and step-by-step tutorials for the curriculum. She will also spearhead the day-to-day management of the course sessions, supporting students as they work with the course management system. Finally, Brett will lead the outreach and publicity for the project, assuring that RRCHNM reaches its targeted numbers of public librarians for instruction. Brett will offer 20% of her overall time to this work.
- *Graduate Research Assistant* (In-kind) [TBD], doctoral student in the George Mason University's Department of History and Art History, will support the main RRCHNM team in the production of the curriculum, the administration of the courses, and the ongoing publicity for the project. The funding for this GRA will come as an in-kind contribution, with summer wage paid for by the grant.
- *James Safley* (Web Developer - 30% effort, year 1) and *Kim Nguyen* (Web Designer - 30% effort, year 1) will collaborate with the PIs during the first year of the project to customize WordPress, integrate features from the Commons in a Box community plugin suite, and design a theme to support the delivery of the curriculum and the asynchronous elements of the course instruction.

Digital Public Library of America: (In-kind) In addition to the work of the RRCHNM staff, *Franky Abbott* and *Samantha Gibson* of the DPLA staff will assist with outreach and publicity for *Creating Local Linkages* by facilitating connections with DPLA Service Hubs to reach public librarians (*See Appendix A: Letters of Support and Commitment*). These connections will be central to connecting participants with important local collections, and will build on the work of DPLA's ["Public Library Partnership Project."](#)

Advisory Board: Members of the Advisory Board will review and comment on the curriculum materials and the *Guide to Teaching Local Digital History Methods*, as well as publicizing the project with their networks of public librarians. As compensation for their work, Advisory Board members will receive \$1000.00 honorarium each year. The Advisory Board will be composed of:

- *Mark Greek* is the Collections Coordinator for Special Collections, DC Public Library. Greek has extensive experience working with local special collections, especially photographic materials, and the work of making them accessible to the public through digital methods.
- *Amita Lonial* is Principle Librarian at the San Diego County Library and a founder of [Librarians for Black Lives](#). Prior to moving to San Diego, Lonial was the co-manager of Learning Experiences at the Skokie Public Library, where she spearheaded the library's annual education program, "[Coming Together](#)," and managed community wide programming and conversation about race.
- *Kristine Navarro-McElhane*y is a Research Administrator at Arizona State University, and Interim Director of the Oral History Association. Navarro-McElhane is an expert in developing and executing community oral history projects, such as the award-winning [Bracero History Archive](#), which gather the stories of Mexicans who had been guest workers in the US between 1942 and 1964.
- *Mary Rizzo*, is an Assistant Professor of Professional Practice and Associate Director of Public and Digital Humanities Initiatives, Rutgers University, Newark. Rizzo is deeply involved in a number of local history projects in New Jersey, including the Queer Newark Oral History Project, and the Camden Environmental Justice Walking Tour Project. She is an organizer for annual [Telling Untold Histories](#) unconference.

3. Diversity Plan

The online course and workshop will be open to all public librarians interested in learning how to do local history using their library's collections and helping their patrons to do the same. Understanding that professional development funds are limited for librarians working at most institutions, particularly in more rural areas of the country, we will run this as a free and flexible online course that may be completed across a timetable that works with registered participants' daily schedules. Within this broad commitment to openness and flexibility, the *Creating Local Linkages* team is committed to serving librarians that from a full range of diverse racial, ethnic, and gender backgrounds, as well as librarians from diverse geographic locations.

We will pursue a targeted recruitment effort that focuses reaching librarians from diverse regions and areas for both the courses and the workshops. We will seek geographic diversity by region, using the definition that the IMLS uses in its Public Library Survey (New England, Mid-East, Great Lakes, Plains, Southeast, Southwest, Rocky Mountains, and Far West). Similarly, we will focus on attracting librarians from the range of but areas (city, suburb, town, and rural) employed by IMLS.⁷ In addition to the designing a recruitment and outreach process that targets librarians in these places, we are committed to hosting the workshops for the project in four different geographic areas. Given the realities of slim travel budgets, it is important to try to offer librarians from as many different regions of the country the possibility of participating in an event that is nearby.

Nationally, the library profession is overwhelmingly female and white while their patrons are much more diverse.⁸ Despite this general imbalance in the profession, we will make a concerted effort to recruit diverse participants for the courses and workshops, and those working in underserved communities. To do so, we will capitalize on the network of public librarians belonging to the Public Library Association. We will also make use of

⁷ "Appendix B," *Public Library Survey: Fiscal Year 2013* (Washington, DC: Institute for Museum and Library Services, 2016), 20-21. Available at <https://www.imls.gov/sites/default/files/publications/documents/plsfy2013.pdf>.

⁸ While the American Libraries Association does not offer demographic data specifically for public librarians, the data for K12, Higher Education, and the general pool of librarians suggests that this holds true for public librarians as well. See *Diversity Counts 2009-2010 Update*, (Chicago, IL: American Library Association, 2012), available at <http://www.ala.org/offices/diversity/diversitycounts/2009-2010update>.

the networks available to us through the IMLS Libraries Division, for example, and will seek assistance to contact current and past grantees of the Native American and Native Hawaiian programs to encourage librarians to register for the online course. We will take advantage of the vibrant professional organizations and roundtables to reach public librarians of diverse backgrounds, including ALA Affiliate Organizations: ([American Indian Library Association](#), [Asian/Pacific American Librarians Association](#), [Black Caucus of ALA](#), [Chinese American Librarians Association](#), [REFORMA](#), and [Urban Libraries Council](#)); the ALA's Roundtables ([Ethnic and Multicultural Information Exchange Roundtable](#), and [Gay, Lesbian, BiSexual, and Transgender Roundtable](#)), and the [Association of Tribal Archives, Libraries, and Museums](#).

4. National Impact

Creating Local Linkages has the potential to reach hundreds of thousands of Americans by offering free training for public librarians who participate in asynchronous online instruction and four face-to-face workshops in the skills and methods of digital local history. Through this continuing education program, RRCHNM will invite librarians to dive into their primary and secondary collections with the eyes of an historian and to expand their digital skills, at their own pace. With these new skills, librarians can create hands-on learning experiences for patrons in service of exploring and creating local histories that will benefit their communities at large. By making the course available online for free in perpetuity, we expect to reach many more librarians than we can through the guided courses, which require participation during a fixed term. This professional development curriculum, together with four hands-on workshops, and through publishing a *Guide to Teaching Local Digital History Methods*, will have a range of key outcomes for the participating public librarians, their institutions, and their communities.

Participating librarians:

- will gain skills to help their patrons make use of the vast digital history sources available to them;
- will be equipped to assist their patrons in expanding their history work beyond the narrow searches for information about ancestors to engage with larger questions about the local social, cultural, and political context of the past;
- will gain key digital skills and familiarity with widely adopted open source digital tools and nationally recognized platforms, including *Omeka* and *Zotero*.

Public libraries (with or without participating staff):

- will have access to the full compliment of curriculum resources in perpetuity so that they can organize and run their own professional development courses;
- will gain an increased capacity to involve their patrons and local communities in the work of collections stewardship;
- will learn how local history collections should be described in a way that conforms with DPLA's metadata standards, making them more likely candidates for inclusion through DPLA service hubs.

Members of local communities:

- will learn from their librarians how to be active creators of their own history beyond doing basic genealogical work;
- will contribute their interpretations on local topics, demonstrating how histories are comprised of multiple perspectives;
- will increase their digital literacy by making their local histories more visible through digital publication;
- will have an increased capacity to connect and assess the local impact of and on national events.

Evaluation

We will use a variety of metrics to evaluate the success of the project curriculum, courses, and workshops.

For the online courses, we will collect a range of data to chart how each participant grows through participation. Prior to the start of the course, we will send a survey to all participants to gauge their base literacy in historical and digital methods and then will measure that again at the end of the eight-week course. Second, we will offer participants an opportunity to comment on the intensive curriculum and instruction through an online survey at least twice during the course. This data will provide a constant loop of feedback from the participants, which will guide the staff and instructors in making mid-course corrections as the weeks progress. Third, the periodic check-ins with participants after the institute through the community features provided in the course platform (discussion forums, messaging, etc.) will collect follow-up data on the effectiveness of the instruction and the long-term impact of the instruction on participants' ability to support digital local history work with their patrons.

For the workshops, we will provide participants with a closing survey to assess the effectiveness of the instruction, and the prospective uses of the knowledge, skills, and abilities developed during the session. We will also follow-up with participants within three months of the workshops to ask them to reflect on the ways the workshop influenced their work at their libraries, through programming or individual interaction with patrons.

In addition to administering surveys to gauge participants' increasing knowledge, skills, and abilities based on the course and workshop programming, we will also include a section in the post-programming surveys that addresses the performance goals and measures associated with the IMLS Agency-Level Learning goals. We will use the responses of the participants to determine the degree to which the curriculum, courses, and workshops served to increase participants' understanding of, interest in, and ability to support their patrons in doing digital local history.

While our evaluation plan primarily offers a mechanism to collect data from those who register to participate in an online course or a face-to-face workshop, we will also attempt to collect data from those who might approach the open curriculum as an individual, self-guided learner. We will leverage the user-registration facilities of the project website to identify and query those individuals, and survey them about their increasing knowledge, skills, and abilities based on the programming. We will also address the performance goals and measures associated with the IMLS Agency-Level Learning goal. Typically the response rate to these survey requests is much lower than that for participants in specific programs, but the feedback will offer us another facet of data about the effectiveness and reach of the educational materials.

Sustaining the work

RRCHNM is committed to sustaining and supporting the teaching digital history through a commitment to providing open educational resources. Since 2014, RRCHNM has run a number summer institutes, sponsored by the NEH's Office of Digital Humanities, the Getty Foundation, and individual colleges and universities, for training self-identified mid-career digital novices in digital history and digital art history. All curricular materials are also posted online and available for participants and others interested in learning from our course development, in perpetuity. The materials developed for *Creating Local Linkages* will similarly be available for free online in perpetuity with a Creative Commons (CC-BY 4.0) license. We will create a unique web domain for the project where all curriculum materials will be accessible to those taking the full course, and for those interested in selecting a module at a time. The *Guide to Teaching Local Digital History Methods* will also be available in this web domain in a special section dedicated to librarians serving as instructors. Finally, all of the open educational resources produced for this project will be preserved in [Mason's institutional repository](#).

Also, the social features of the project website provided by Commons-in-a-Box suite will allow the geographically disbursed course participants to work together and share their insights long after their *Creating Local Linkages* experience. This community of learners will grow with each cohort of participants and will contribute to the ongoing support and sustenance of the librarians as they work with their local communities. RRCHNM commits to maintain the curriculum and the social platform beyond the close of the grant period to allow the community to thrive and expand as others use the curriculum.

Creating Local Linkages (IMLS-LB21)

Schedule of Completion: Year 1 (2017-2018)

Task	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Curriculum Content for Module 1		■	■									
Curriculum Content for Module 2			■	■								
Curriculum Content for Module 3				■	■	■						
Curriculum Content for Module 4						■	■	■				
Curriculum Content for Module 5								■	■	■		
Design certification assessment elements											■	■
Develop course management system	■	■	■	■	■	■	■	■	■	■	■	■
Draft patron curriculum materials											■	■
Publicity and Outreach										■	■	■

DIGITAL PRODUCT FORM

Introduction

The Institute of Museum and Library Services (IMLS) is committed to expanding public access to federally funded digital products (i.e., digital content, resources, assets, software, and datasets). The products you create with IMLS funding require careful stewardship to protect and enhance their value, and they should be freely and readily available for use and re-use by libraries, archives, museums, and the public. However, applying these principles to the development and management of digital products can be challenging. Because technology is dynamic and because we do not want to inhibit innovation, we do not want to prescribe set standards and practices that could become quickly outdated. Instead, we ask that you answer questions that address specific aspects of creating and managing digital products. Like all components of your IMLS application, your answers will be used by IMLS staff and by expert peer reviewers to evaluate your application, and they will be important in determining whether your project will be funded.

Instructions

You must provide answers to the questions in Part I. In addition, you must also complete at least one of the subsequent sections. If you intend to create or collect digital content, resources, or assets, complete Part II. If you intend to develop software, complete Part III. If you intend to create a dataset, complete Part IV.

PART I: Intellectual Property Rights and Permissions

A.1 What will be the intellectual property status of the digital products (content, resources, assets, software, or datasets) you intend to create? Who will hold the copyright(s)? How will you explain property rights and permissions to potential users (for example, by assigning a non-restrictive license such as BSD, GNU, MIT, or Creative Commons to the product)? Explain and justify your licensing selections.

A.2 What ownership rights will your organization assert over the new digital products and what conditions will you impose on access and use? Explain and justify any terms of access and conditions of use and detail how you will notify potential users about relevant terms or conditions.

A.3 If you will create any products that may involve privacy concerns, require obtaining permissions or rights, or raise any cultural sensitivities, describe the issues and how you plan to address them.

Part II: Projects Creating or Collecting Digital Content, Resources, or Assets

A. Creating or Collecting New Digital Content, Resources, or Assets

A.1 Describe the digital content, resources, or assets you will create or collect, the quantities of each type, and format you will use.

A.2 List the equipment, software, and supplies that you will use to create the content, resources, or assets, or the name of the service provider that will perform the work.

A.3 List all the digital file formats (e.g., XML, TIFF, MPEG) you plan to use, along with the relevant information about the appropriate quality standards (e.g., resolution, sampling rate, or pixel dimensions).

B. Workflow and Asset Maintenance/Preservation

B.1 Describe your quality control plan (i.e., how you will monitor and evaluate your workflow and products).

B.2 Describe your plan for preserving and maintaining digital assets during and after the award period of performance. Your plan may address storage systems, shared repositories, technical documentation, migration planning, and commitment of organizational funding for these purposes. Please note: You may charge the federal award before closeout for the costs of publication or sharing of research results if the costs are not incurred during the period of performance of the federal award (see 2 C.F.R. § 200.461).

C. Metadata

C.1 Describe how you will produce any and all technical, descriptive, administrative, or preservation metadata. Specify which standards you will use for the metadata structure (e.g., MARC, Dublin Core, Encoded Archival Description, PBCore, PREMIS) and metadata content (e.g., thesauri).

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

C.3 Explain what metadata sharing and/or other strategies you will use to facilitate widespread discovery and use of the digital content, resources, or assets created during your project (e.g., an API [Application Programming Interface], contributions to a digital platform, or other ways you might enable batch queries and retrieval of metadata).

D. Access and Use

D.1 Describe how you will make the digital content, resources, or assets available to the public. Include details such as the delivery strategy (e.g., openly available online, available to specified audiences) and underlying hardware/software platforms and infrastructure (e.g., specific digital repository software or leased services, accessibility via standard web browsers, requirements for special software tools in order to use the content).

D.2 Provide the name(s) and URL(s) (Uniform Resource Locator) for any examples of previous digital content, resources, or assets your organization has created.

Part III. Projects Developing Software

A. General Information

A.1 Describe the software you intend to create, including a summary of the major functions it will perform and the intended primary audience(s) it will serve.

A.2 List other existing software that wholly or partially performs the same functions, and explain how the software you intend to create is different, and justify why those differences are significant and necessary.

B. Technical Information

B.1 List the programming languages, platforms, software, or other applications you will use to create your software and explain why you chose them.

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

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

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

B.5 Provide the name(s) and URL(s) for examples of any previous software your organization has created.

C. Access and Use

C.1 We expect applicants seeking federal funds for software to develop and release these products under open-source licenses to maximize access and promote reuse. What ownership rights will your organization assert over the software you intend to create, and what conditions will you impose on its access and use? Identify and explain the license under which you will release source code for the software you develop (e.g., BSD, GNU, or MIT software licenses). Explain and justify any prohibitive terms or conditions of use or access and detail how you will notify potential users about relevant terms and conditions.

C.2 Describe how you will make the software and source code available to the public and/or its intended users.

C.3 Identify where you will deposit the source code for the software you intend to develop:

Name of publicly accessible source code repository:

URL:

Part IV: Projects Creating Datasets

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

A.2 Does the proposed data collection or research activity require approval by any internal review panel or institutional review board (IRB)? If so, has the proposed research activity been approved? If not, what is your plan for securing approval?

A.3 Will you collect any personally identifiable information (PII), confidential information (e.g., trade secrets), or proprietary information? If so, detail the specific steps you will take to protect such information while you prepare the data files for public release (e.g., data anonymization, data suppression PII, or synthetic data).

A.4 If you will collect additional documentation, such as consent agreements, along with the data, describe plans for preserving the documentation and ensuring that its relationship to the collected data is maintained.

A.5 What methods will you use to collect or generate the data? Provide details about any technical requirements or dependencies that would be necessary for understanding, retrieving, displaying, or processing the dataset(s).

A.6 What documentation (e.g., data documentation, codebooks) will you capture or create along with the dataset(s)? Where will the documentation be stored and in what format(s)? How will you permanently associate and manage the documentation with the dataset(s) it describes?

A.7 What is your plan for archiving, managing, and disseminating data after the completion of the award-funded project?

A.8 Identify where you will deposit the dataset(s):

Name of repository:

URL:

A.9 When and how frequently will you review this data management plan? How will the implementation be monitored?