Abstract

Principal investigators from the Triangle Research Libraries Network (TRLN) will develop and pilot a three-day, intensive Library Copyright Institute designed to provide a start to a concerted program of education, accreditation, and ongoing support for librarians. The Library Copyright Institute leverages the knowledge, experience and education of library copyright experts to raise the level of library copyright expertise across U.S. libraries, especially at institutions who are not able to support a dedicated staff member devoted full-time to copyright. Although the demand for library staff with a knowledge of copyright has increased and several library organizations include copyright expertise as one of the competencies librarians need, most librarians today do not have access to adequate copyright and legal training. Copyright education in LIS programs remains rare, patchwork, inconsistent, and elective.

The four PIs, Will Cross (NC State), Anne Gilliland (UNC Chapel Hill), and David Hansen (Duke) (lead applicant), and Patrick Roughen (NC Central), will partner with national library copyright experts to develop a three-day curriculum that offers a grounding in copyright fundamentals and develop competencies in copyright exceptions such as fair use, as well as copyright's application to librarianship. They will also prepare a set of daylong capstone trainings for specific communities within the profession such as Special Collections & Archives, Instruction & Public Service, and Administration & Policy Development. The Institute will be planned and advertised in spring 2019 and the event held in summer 2019 at the James B. Hunt, Jr. Library in Raleigh, NC. Survey evaluations of the pilot will be used to develop a final report that shares lessons learned, as well as a toolkit that other institutions can use to develop their own training.

The project addresses the goals of the IMLS Laura Bush 21st Century Librarian program by enhancing the copyright expertise of librarians at many points in their careers and in a variety of types of libraries. Since under-resourced libraries are the ones least likely to have a copyright expert on staff, copyright training that is local, affordable, and ongoing should have the greatest impact in those communities. We will also be deliberate about identifying and showcasing expertise from a diverse set of instructors. The four PIs reflect the diversity of TRLN, which is itself made of up a diverse set of institutions, including a public state flagship university, a public land grant institute, an "Ivy plus" private institution, and a historically black university. In addition, we will give priority to registrants for the Library Copyright Institute who come from underrepresented or disadvantaged institutions.

The success of this project will be determined by the results of the pilot, as measured in course evaluations and the follow up work done using the toolkit. If successful, the Institute will be offered on a recurring basis and provide certification for librarians seeking a copyright credential for their professional development. All planning and implementation will be done with an eye to building long term infrastructure and toward a sustainable system of delivering copyright education to staff at poorly-resourced institutions. The forms for this ongoing delivery and infrastructure are likely to include ongoing regional events and a roadshow model for instruction. The project will help develop a community of librarians who are more confident and knowledgeable about the copyright issues and dilemmas that will surely continue to occupy us in the years to come.

NARRATIVE: LIBRARY COPYRIGHT INSTITUTE

1. STATEMENT OF BROAD NEED

Librarians from all types of institutions need to understand copyright law. Although copyright has always been a component of librarianship, it has become more essential to librarianship in the last decade. Now-routine library activities such as digitization, course reserves, and interlibrary loan raise significant copyright issues. And new initiatives such as digital lending, mass digitization, and streaming video services require a sophisticated understanding of the law. We have found that disparities in users' access to information resources are exacerbated at under-resourced institutions in part because of uncertainty about how the law allows for reuse of copyrighted materials in teaching, research, and scholarship. We propose this Library Copyright Institute to overcome those barriers.

Many well-resourced libraries now employ lawyers or librarians with significant legal training to provide education and information about copyright for both faculty, staff, and students, and internally within the library. In keeping with these trends, ALA identifies copyright as a "core competency." Similarly, the North American Serials Interest Group (NASIG) includes a long list of copyright topics in their "Core Competencies for Scholarly Communication Librarians," and both ARL and ACRL include copyright resources prominently on their websites. One common reason that libraries need staff with copyright expertise is to make well-reasoned assessments of risk in areas where there is little certainty, such as digitization of orphan works. Increasingly, even very small libraries with small budgets need to make these assessments as part of national or regional projects, such as the Digital Public Library of America.

Despite libraries' increased need for staff with copyright expertise, most librarians today do not have access to adequate copyright and legal training. Copyright education in LIS programs remains rare, patchwork, inconsistent, and elective. Particularly after the

closure of the Center for Intellectual Property at the University of Maryland University College, librarians have no clear venue to pursue hands-on professional development and certification in copyright. While online resources such as scholarly communication websites and MOOCs, as well as copyright-focused conference presentations, provide valuable support, a significant gap remains for librarians looking for a holistic understanding they can apply in their own work. Because copyright law changes as courts issue opinions and Congress makes statutory changes, this training needs to be sufficient to provide a basis for ongoing study and development. It is also important for librarians who deal with copyright matters to have a cohort with whom they can discuss trends and legal changes. Copyright law, especially fair use jurisprudence, is seldom clear-cut. Awareness of risk factors, and a chance to talk through issues with peers is an important part of this work. Librarians who make copyright decisions need for their administration to recognize them as experts--and they need the education and ongoing resources to merit that recognition. For this training to effectively empower librarians, offer credible certification of expertise, and seed extensible change at the national level, it must be led by experts and offer more than a single workshop or conference presentation can provide.

This proposal requests funds to develop and pilot a three-day, intensive Library Copyright Institute designed to provide a start to a concerted program of education, accreditation, and ongoing support for librarians. The Library Copyright Institute leverages the knowledge, experience and education of library copyright experts to raise the level of library copyright expertise across U.S. libraries, especially at institutions who are not able to support a dedicated staff member devoted full-time to copyright.

Development will be led by co-PIs from across the Triangle Research Libraries: Will Cross (NC State), Anne Gilliland (UNC Chapel Hill), David Hansen (Duke), and Patrick Roughen (NC Central). The Triangle Research Libraries community is particularly well-situated to develop this type of resource. With three nationally-recognized law

schools and a similar number of respected LIS graduate programs, North Carolina's Research Triangle is home to significant expertise in both copyright law and librarianship. This expertise is embodied in a strong cohort of scholarly communication librarians and in programs for in-depth professional development such as Duke's Scholarly Communication Institute and NC State's Data Science and Visualization Institute for Librarians. Cross and Gilliland also teach a semi-annual Legal Issues for Librarians course at the UNC School of Information and Library Science. Hansen has taught at UNC School of Law on copyright and technology issues and has developed and taught a two-week intensive "Copyright for Librarians" course for Duke librarians. Gilliland also co-developed the popular Copyright for Educators MOOC, has developed and taught copyright classes for librarians at UNC-Chapel Hill, and teaches a "Copyright for Health Sciences Librarians" class that she developed for the Medical Library Association. Cross is the Presenter Coordinator for the ACRL Scholarly Communication Roadshow. With support from IMLS, this expertise can serve as a foundation that supports invited experts from across North America working to develop and pilot a three-day curriculum that will prepare a cohort of participants to understand copyright in their profession and lead copyright efforts at their own institutions. A successful prototype will also lead to the creation of a sustainable ongoing Institute to be offered annually at cost for a national audience and the tools to replicate it at other institutions across North America.

2. PROJECT DESIGN

2.1 Goals and Outcomes

The four co-PIs will work with experts in the field to develop a three-day curriculum that offers an immersive grounding in copyright fundamentals and develop competencies in copyright limitations and exceptions such as fair use, as well as copyright's application to librarianship. They will also prepare a set of daylong capstone trainings for specific communities within the profession such as Special Collections & Archives, Instruction & Public Service, and Administration & Policy Development. The two main goals of this

planning and workshop are: 1) to successfully train an initial cohort of librarians through the workshop itself, and to initiate the development of a regional community of library copyright experts; and 2) develop a model for future Institutes, including a portable curriculum and workshop guide so that the Library Copyright Institute can be hosted in other regions, accessible to librarians at under-resourced institutions in those areas.

While they will provide much of the instruction, the PIs will invite other leaders in library copyright to teach sessions where their expertise and diverse perspectives will be most valuable. Recognized experts such as Brandon Butler (UVA), Sandra Enimil (Ohio State), Ana Enriquez (University of Michigan), Molly Keener (Wake Forest), Melissa Levine (University of Michigan), Lisa Macklin (Emory), Nancy Sims (University of Minnesota) and Kevin Smith (University of Kansas) have already indicated their willingness to participate, contingent on availability. We have included their letters of support in this packet as "Supporting Document 2". Logistics will be finalized in the spring of 2019 and applications will be accepted for a summer 2019 pilot, to be hosted in the James B. Hunt, Jr. Library in Raleigh, NC. Evaluations and assessment of the pilot will be used to develop a final report that shares lessons learned, as well as a toolkit that other institutions can use to develop their own training.

Phase 1: Planning and Preparation

This work will begin with an environmental scan and formal gap analysis that builds on and updates the work has already been done on the need for more complete copyright education for librarians. In consultation with the expert presenters we have identified, we will conduct a national survey and follow up interviews with stakeholders about current resources and needs. Informed by this research, as well as our own experience, we will then develop materials for the Institute, including slides, handouts, worksheets, and lesson plans.[1] All of these materials will be openly-licensed and shared after the

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[1] We plan to create these materials by building upon curriculum resources already available. This includes, among many other resources, the following:
- Course slides, lesson plans and handouts from Hansen's two-week intensive Copyright for Librarians course, https://duke.box.com/v/dukecopyrightconsultants;

first pilot Institute. We will also use this research to refine our list of expert presenters, adding new names that emerge, with a particular eye to elevating underrepresented voices. We will also begin developing publicity materials and soliciting participation in the Institute.

Phase 2: Hosting the Institute

With a full slate of presenters and materials, we will host the Institute in summer of 2019. Instructors will gather prior to the Institute to finalize the event and harmonize materials. The Institute will be held over three days, with the first two days devoted to an overview of copyright law for librarians. Sessions throughout each day will be led by a diverse set of presenters to provide different perspectives and distribute workload. The third day will devoted to individual capstone training for Special Collections & Archives, Instruction & Public Service, and Administration & Policy Development. Each of these capstones will be led by one of the PIs, with support from other expert presenters. A preliminary agenda is included as "Supporting Document 1."

Phase 3: Evaluation, Reporting, and Identifying A Sustainable Path Forward

Evaluation of the Institute will be informed by participant feedback and a meeting where instructors will gather at the end of the Institute to assess their own sessions and those led by fellow instructors. Taken together, these materials will be used to evaluate what aspects of the Institute were most successful and what aspects need to be revised. A final report will be generated that presents these findings along with an overview of the Institute itself and a full report of findings from the surveys and interviews. Upon completion of the Institute and the follow-up report, it will openly-licensed along with the

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- Course materials creatred for Gilliland's "Copyright for Educators and Librarians" Coursera MOOC, https://www.coursera.org/learn/copyright-for-education;
- Kevin L. Smith, Owning and Using Scholarship: An IP Handbook for Teachers and Researchers (ACRL 2014), http://www.ala.org/acrl/sites/ala.org.acrl/files/content/publications/booksanddigitalresources/digital/9780838987483_copyright_OA.pdf;
- Berkman-Klein Center for Internet and Society-EIFL, Copyright for Librarians Project (n.d.), http://cyber.harvard.edu/copyrightforlibrarians/Main_Page

slides and lesson plans, and shared publicly so others can review and build on this work by hosting their own event. The co-PIs will also begin developing a sustainable path for offering the Institute in the Research Triangle and at other locations across the United States. Preliminary conversations have identified models based on regional hubs of expertise that host local events as well as a Roadshow model similar to the ACRL's ongoing suite of Roadshows covering topics such as scholarly communication, information literacy, and research data management.

2.2 Project Resources: Personnel, Time, Budget
Key Personnel/ Project Leads:

Will Cross (Principal Investigator) is the Director of the Copyright & Digital Scholarship Center in the NCSU Libraries and an instructor in the UNC SILS. Trained as a lawyer and librarian, he guides policy, speaks, and writes on open culture and navigating legal uncertainty. As presenter coordinator for the ACRL Scholarly Communication Roadshow, Will has developed training materials and workshops for international audiences from Ontario to Abu Dhabi. He has served as co-PI on successful IMLS grants for supporting OER adoption (LG-72-17-0051-17) and teaching scholarly communication to LIS students (LG-72-17-0132-17) and is currently developing educational materials on legal issues for SPARC, the Open Textbook Network, and Creative Commons USA.

Anne Gilliland (Principal Investigator) is the Scholarly Communication Officer at the University of North Carolina at Chapel Hill Libraries. She holds an M.S.L.I.S. from the University of Tennessee and a J.D. from Capital University. She has worked in copyright and scholarly communication for academic libraries for ten years and in the library profession for over thirty years. She was one of the developers and teachers for two popular massive open online courses available on the Coursera platform: Copyright for Educators and Libraries and Copyright for Multimedia. She has presented workshops

and taught classes on copyright to a wide variety of audiences, from schoolchildren to anesthesiologists.

Dave Hansen (Principal Investigator and Project Director) is the Associate University Librarian for Research, Collections & Scholarly Communications at Duke University Libraries. He has worked extensively on research and instruction projects that focus on the intersection of copyright and information policy and libraries. The theme of those projects has been to increase understanding of copyright law with the goal of enabling broader, more equitable access to information. He holds an M.S.L.S from the University of North Carolina at Chapel Hill, as well as a J.D. from the University of North Carolina School of Law.

Patrick Roughen (Principal Investigator) is Assistant Professor and Interim Director, MLS Program, at the School of Library and Information Sciences at North Carolina Central University in Durham, North Carolina. He holds a law degree from the University of Georgia and a Ph.D. in Library and Information Science from the University of South Carolina, where he was awarded a Laura Bush 21st Century Librarian Teaching and Research Fellowship through the Institute of Museum and Library Services. He received a B.S. Chemistry degree from Armstrong State University and obtained an MLIS from Valdosta State University. He is admitted to practice before the United State Patent and Trademark Office and is a member of the State Bar of Georgia.

Budget: Total funding requested for this project is $49,876. The bulk of the budget is for funding the planning and hosting of the Institute event itself. The proposed budget for this project includes salaries and fringe benefits for the Duke (the organizing institution) Principal Investigator for 4% of his time over the course of the project year (total of $5,562 salary and $1,392 for benefits) as well as funding for a graduate student to support planning and delivery of the Institute ($2,228 salary and $540 for benefits). The proposed budget also includes funds for the Institute event itself, including $5,280 for

food and $6,750 to support attendance by six expert presenters. We aim to include 30 Institute participants, who will not be charged for attendance. Because the workshop will involve overnight stay, to encourage the first cohort of participants to attend we have budgeted lodging expenses for their attendance ($15,750). The indirect costs of Duke are assessed against the total direct costs of the project at 33%, totaling $12,375.

In addition to the project budgeted here, the participating institutions expect to expend resources to cause both the initial Institute and future versions of this Institute be a success. Although not a formal cost-share, we fully expect to support this project to maturity. For example, NCSU Libraries expects to commit substantial space resources by physically hosting the Institute at its James B. Hunt Library at no charge. And all four institutions plan to promote the project through staff travel at national and regional conferences, and to devote staff time beyond that budgeted here to plan, host, and develop follow-up plans for the Institute.

Timeline: The project will be conducted from December 1, 2018 through November 30, 2019, in the following three phases: (1) a planning and preparation phase; (2) hosting the Institute; and (3) evaluation, reporting, and identifying a sustainable path forward Details for the project phases are provided earlier in the project design section and broken out in the Schedule of Completion document.

3. DIVERSITY STATEMENT

Diversity and inclusion are the main motivators for this project. Our goal is to ensure that librarians serving a broad and diverse set of researchers have the tools they need to most effectively handle the copyright issues they encounter. Librarians at all institutions (and their users) should be able to confidently apply fair use, understand their licenses, and assess public domain status. Inequality of resources should not mean that the beneficial rights granted by copyright law are unavailable to librarians, researchers, teachers and students at those institutions.

As we develop the project, the project team will ensure a broad diversity of participant samples for the survey within the limits of the target population of and the amount of information available about the demographic characteristics of potential participants. We want to make sure the Institute will be most useful to the participants we set out to serve. We will also be deliberate about identifying and showcasing expertise from a diverse set of instructors. The four PIs reflect the diversity of TRLN, which is itself made of up a diverse set of institutions, including a public state flagship university, a public land grant institute, an "Ivy plus" private institution, and an historically black university.

For Institute participants, the Institute is designed to fill a need for libraries that do not have full-time copyright expertise and is offered at no cost to participants in order to reduce barriers to participation. In this spirit, we will give priority to registrants who come from underrepresented or disadvantaged institutions. Because we plan to host the Library Copyright Institute in North Carolina, which has a significant number of historically black colleges, we plan to specifically encourage their library staff to participate. Should the Library Copyright Institute be repeated in other regions in the future, similar strategies for identifying groups of librarians at institutions with populations of historically disadvantaged users could be done.

3. BROAD IMPACT

The success of this project will be determined by the results of the pilot, as measured in course evaluations and the follow up work done using the toolkit. If successful, the Institute will be offered on a recurring basis and provide certification for librarians seeking a copyright credential for their professional development. All planning and implementation will be done with an eye to building long term infrastructure and toward a sustainable system of delivering copyright education to staff at poorly-resourced institutions. The forms for this ongoing delivery and infrastructure are likely to include ongoing regional events and a roadshow model for instruction, with the idea that a

sustainable financial model is to have a few expert instructors travel to an Institute hosted regionally, rather than the traditional conference to which many attendees are expected to pay to travel to the experts to participate. By design, the immersive three-day experience is meant to encourage the development of a regional community of practice that itself can contribute to the ongoing sustainability of the Institute. We also believe such a network will contribute to national involvement, to help meet common continued needs of the Institute (e.g., updated curriculum as the law changes) over time.

Participants will be encouraged to document their experience through blogs and social media throughout the planning and pilot, and to share their ongoing activities at their own campuses. The co-PIs will share methods and lessons learned in peer-reviewed journal article, national conferences, and other less formal mechanisms, such as social media.

Long term, the effect of the symposium would be to provide staff at under resourced libraries with a cohort to turn to when they have questions; a channel for learning about changes in the law, court cases, and changes in practice; packaged resources that are updated for their use; and identification of and access to experts. The PIs will work with regional entities, such as state library systems, and regional library organizations and associations to publicize the copyright educational opportunities and identify people and institutions that would benefit from training.

Tasks (Start October 1, 2018)	December	January	February	March	April	May	June	July	August	September	October	November	Phases
Environmental scan and survey development													1 - Preparation & Planning
Conduct survey													
Analyze survey													Hosting Institute
Conduct follow-up interviews													Reporting, and
Finalize expert presenter team													
Publicize and register participants													
Develop learning outcomes, lesson plans, and slides													
Hold Copyright Institute													
Review evaluations and hold meeting of instructors to assess the Institute													
Begin disseminating project findings													
Write and disseminate final report													

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.

Rights in all digital products created for this project will vest with their individual or joint creator, which will then be licensed for free reuse under a Creative Commons Attribution 4.0-ShareAlike International License or another less restrictive Creative Commons license. Because the contributions to digital products (e.g., course materials) will be produced by a variety of contributions subject to different institutional IP ownership rules, each contributor will be required to sign an agreement acknowledging this IP owernship arrangement and openly licensing their contributions for free reuse under the CC-BY-SA 4.0 International License or another less restrictive CC license.

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.

Duke policy states that intellectual property ownership in works supported by grants shall be determined by the terms of the grant. As stated above, for this grant, rights remain with individual creators, which will be shared openly online for the benefit for the community at large. We will impose no conditions on access and use beyond those in the Creative Commons Attribution-ShareAlike 4.0 International License under which we will license the project content.

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 do not anticipate creating any products that raise privacy concerns or cultural sensitivities. Because we anticipate creating course materials that may be reused, our instructions to course instructors will be clear that any use of third-party materials must either include permission or otherwise be appropriate for reuse online under U.S. law, including fair use.

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.

The primary digital content we anticipate creating is a Course Materials Package for others who would seek to recreate the Library Copyright Institute locally for librarians in their area. For each segment of the Institute we will have written lesson plans, reusable presentation, handouts, and instructor notes. For some segments, when appropriate, we will also have "flipped classroom" videos for participant viewing. For overall institute planning, we would also provide a logistical planning package of textual information (e.g., budgeting information, a list of experts who have indicated willingness to participate, outreach and advertising forms). We also envision creating a small website to collect and communicate these materials to the community.

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.

All course material content will be created on and compatible with standard office productivity tools--Microsoft Office, Google Docs, OpenOffice.

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).

.txt, .pdf, .csv, .wav, .mp4, .docx, .html

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).

Quality of the course materials and other products produced by expert instructors will involve a review and comment process with key project staff to ensure that the content complies with our stated learning objectives for participants, is sufficiently explained for future users of the content, and that it adequately states and teaches copyright law in the given content. After completion of the Institute, the full package of course materials will be compiled, edited, and sent to the expert instructors for their review and feedback. For workflow management, key project staff will hold bi-weekly check-ins on course development and will also develop a more detailed course materials time line that aligns with the overall Schedule of Completion for this project.

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).

Digital course materials files and final reports (our primary outputs from the project) will be preserved through the Duke Digital Repository, https://library.duke.edu/ddr/, which is a service of Duke University Libraries that supports the activities of the University's faculty, researchers, students, and library staff by preserving, securing, and providing access to digital resources.

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).

For our course materials package and final report, upon ingest into the Duke Digital Repository materials will be assigned Dublin Core descriptive metadata in consultation with the Duke Repository staff.

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

Metadata created with the deposited course materials will be preserved and maintained according to Duke Digital Repository policies.

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).

Because our materials are designed for use by other experts who seek to organize and host their own local Library Copyright Institute, our primary strategy to facilitate discovery will be communication to the relatively small community of library-library copyright experts through a community, ARL-managed listserv and associated conferences. Although we believe discovery of course content will be primarily by personal outreach and communication, because this content will be preserved and shared via the Duke Digital Repository, metadata will be openly exposed to a variety of aggregators of repository content (e.g., Google, Google Scholar).

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).

The Course Materials Package will be available openly online, accessible via standard web browsers. Core course content and the final report will be preserved and stored on the Duke Digital Repository, and a lightweight website hosted on Duke Servers will communicate that content and include other explanatory materials.

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.

Duke-hosted website: https://sites.duke.edu/copyrightconsultants
Duke Scholarship Repository: https://dukespace.lib.duke.edu/dspace/
Duke Digital Collections: https://library.duke.edu/ddr/library-collections

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.
N/A

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.
N/A

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.
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) and URL(s) for examples of any previous software your organization has created.

N/A

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.

N/A

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

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

N/A
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.

N/A

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?

N/A

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).

N/A

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.

N/A

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).

N/A

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?

N/A

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

N/A

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

N/A

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

N/A