

University of North Carolina at Chapel Hill

Primary Sources Teaching Fellowship Program: Building Primary Source Literacy by Training the Next Generation of Instruction Librarians and Archivists, University of North Carolina at Chapel Hill Libraries

Wilson Special Collections Library (Wilson Library) with the University of North Carolina (UNC) at Chapel Hill Libraries (University Libraries), as lead applicant, in partnership with the Teaching with Primary Sources (TPS) Collective, requests a three-year Project Grant of \$264,580 to support the development and implementation of an online summer fellowship program in primary source pedagogy designed to 1) build primary source literacy in diverse communities at a national level through North Carolina's five MLIS programs; 2) fill gaps in current MLIS curricula by training new librarians and archivists in primary source pedagogy and critical librarianship; and 3) build capacity within academic libraries and archives across the country to meet the rising demand for in-person and digital education with primary source collections including archives, manuscripts, rare books, ephemera, born digital materials, and digitized collections. Wilson Library is working with the support of five academic programs that offer master's degrees library science within the University of North Carolina System: Appalachian State University's Department of Leadership and Educational Studies, North Carolina Central University's School of Library and Information Sciences, East Carolina University's College of Education, the University of North Carolina at Chapel Hill's School of Information and Library Science, and the University of North Carolina at Greensboro's Department of Library and Information Science.

Statement of Broad Need: Primary sources can create a rich opportunity for engaging with questions of historical equity. They play a vital role as evidence of historical events and people that are otherwise unrecorded by history and national myth-making. They help us reckon with the past; help correct erroneous beliefs that persist in national, local, and personal narratives; and help envision our futures. Educators at all levels, from K-12 to higher education, rely on librarians and archivists to help them and their students understand and contextualize primary sources. Many of these sources reveal histories of violence, hate, and oppression. There is a broad need within the library profession for librarians and archivists trained in primary source pedagogy that works to dismantle white supremacy and other unequal power structures that persist in our educational institutions. There is widespread recognition in the profession that many special collections that preserve primary sources have also been built to support and sustain white supremacy, patriarchal power structures, and archival silences. The profession needs librarians and archivists trained in how to teach others to analyze and interpret primary source objects—and the institutions that collect them—using anti-racist and feminist pedagogical approaches. We define anti-racist pedagogy as an approach to teaching that educates students from across the academic disciplines about the history of race, that helps students identify and articulate racism in the historical record, and that works to dismantle white supremacy through education. We define feminist pedagogy as an approach to teaching that values and affirms all gender identities and their intersections with other cultural identities, that centers the embodied experiences of students, and that is based in an ethics of care. To meet the need for these approaches in library instruction, the profession needs more teaching librarians and archivists from identities and backgrounds that are currently underrepresented. It also needs primary source literacy and education training across the library profession, including special collections, academic libraries, K-12 libraries, and public libraries. Finally, it needs a foundational pedagogy that interrogates and rejects the concept of institutional and cultural neutrality.

This training program would build on existing pedagogical training supported by MLIS programs, professional societies, and independent learning centers. MLIS programs across the country provide students with coursework in library pedagogy. However, these courses often focus on general library instruction rather than making primary source instruction central. A 2018 study of graduate library and information sciences (LIS) curricula found that there are “few opportunities for future archivists to gain any pedagogical training, especially skills in teaching with

primary sources.”¹ Primary source instruction presents a unique set of challenges, as the *Guidelines for Primary Source Literacy* (2018) attest: “Primary sources can ... be challenging to those who use them. The formats of primary sources may be unique and unfamiliar. They require critical analysis due to their creators’ intents and biases; the variety of contexts in which they have been created, preserved, and made accessible; and the gaps, absences, and silences that may exist in the materials.”² Librarians entering their careers with little to no pedagogical training with primary source instruction theory and practice often find the work of teaching new users how to think critically about primary sources challenging.

Programs outside of MILS education have worked to fill the gap in primary source pedagogical training. For example, Dartmouth’s *Librarians Active Learning Institute* has a week-long course focused on archives and special collections, and the University of Virginia’s Rare Book School has a week-long course called “*Teaching the History of the Book*.” However, neither of these curricula incorporate feminist or anti-racist theory as core pedagogical tenets, nor do they articulate a challenge to normative power structures within archives, special collections, and higher education more broadly. These programs are also highly selective, expensive, and require a full week of unfunded travel for most attendees.

Special collections professional societies, namely the Rare Books and Manuscripts Section (RBMS) of the Association of College and Research Libraries (ACRL) and the Society of American Archivists (SAA), have also provided some programming to address this gap in pedagogical training. At the *2019 annual RBMS conference*, the RBMS Instruction and Outreach Committee and RBMS Diversity Committee co-hosted a seminar titled “Ethical Outreach with Culturally Sensitive Content.” The *2020 RBMS annual conference*, which was canceled due to COVID-19, would have featured a seminar titled, “Critical Race Pedagogy in the Primary Source Classroom,” co-hosted again by the RBMS Instruction and Outreach Committee and RBMS Diversity Committee. At the *2019 annual SAA meeting*, there was a presentation on “Teaching about Sexuality from the Archives: Creating Student-Centered Instruction with Archival Materials around Gender and Sexuality.” Attending these conferences comes with a considerable expense, especially for MLIS students who lack institutional support, and while SAA offers recordings of its conference programming to its members, RBMS does not. Therefore, much of this programming is ephemeral and inaccessible to under-resourced students.

UNC’s University Libraries’ partner in this grant, the Teaching with Primary Sources (TPS) Collective, has begun work toward more equitable primary source instruction, toward dismantling white supremacy, and toward challenging neutrality within the library profession. The TPS Collective is an independent group that supports teachers of primary sources at all levels and institutions, especially young professionals and professionals who are Black, Indigenous, and People of Color (BIPOC) in the library and archival field. TPS is built upon a non-hierarchical peer mentorship structure and works in close collaboration and alignment with the Instruction and Outreach Committee of the Rare Books and Manuscripts Section (RBMS) of the Association of College and Research Libraries (ACRL) and the Teaching with Primary Sources Committee of the Society of American Archivists (SAA). The *2020 TPS Unconference* featured two sessions titled “Teaching sensitive and difficult topics,” including one for attendees who are BIPOC. In addition, their *toolkits webpage* also has a forthcoming section on “Teaching with Culturally-Sensitive Content.” UNC’s goal in partnering with TPS is to provide future content and programming that expands topics such as these and makes social justice as well as anti-racist and feminist pedagogy central to teaching with primary sources.

¹ Anderberg, Lindsay, Robin M. Katz, Shaun Hayes, Alison Stankrauff, Morgen MacIntosh Hodgetts, Josué Hurtado, Abigail Nye, and Ashley Todd-Diaz. 2018. “Teaching the Teacher: Primary Source Instruction in American and Canadian Archives Graduate Programs.” *The American Archivist* 81 (1): 188–215. <https://doi.org/10.17723/0360-9081-81.1.188>.

² Page 1.

UNC's Wilson Special Collections Library is uniquely suited to oversee this proposed fellowship program. Wilson Library is the largest special collections at an academic library in the southeast, and it has dedicated significant resources to teaching, including two special collections classrooms and five instruction librarians. Each year, Wilson's teaching librarians and archivists train MLIS students enrolled in UNC Chapel Hill's School of Library and Information Science (SILS) program who are employed by the Library in teaching with special collections. Our teaching librarians and archivists are also involved in the Libraries' Reckoning Initiative, a Library-wide program that helps staff interrogate library systems and understand how they can fail to advance equity and justice. With the support of our university librarian, our librarians and archivists have received training from the Racial Equity Institute; developed Library-wide projects that support inclusion, diversity, equity, and access; and regularly apply critical race and feminist pedagogies in their own instructional work. Because of these rich resources, Wilson Library has the professional expertise to support this program and guide its fellows. Before the pandemic, we had seen a 20% increase in the demand for instruction over the previous five years, and since COVID-19 we have shifted to teaching online. In both contexts, our librarians collaborate with faculty and teachers on designing curricula and research projects often around the topics of the history of race and injustice in America and beyond. For example, our teaching librarians have developed primary source research projects for multiple courses in UNC's "Reckoning: Race, Memory and Reimagining the Public University" curriculum. The University Libraries has also recently assessed Wilson's instruction program through research conducted for an ITHAKA S+R report, *Teaching With Primary Sources at the University of North Carolina at Chapel Hill*. This report underscores the complexity of teaching with primary sources, the need for collaborative teaching skills, and the benefit of primary sources to student learning and engagement. Finally, Wilson Library houses large and diverse collections focused on primary sources from the American South across multiple formats as well as a robust digitization program to support the needs of this fellowship program.

The Primary Sources Teaching Fellowship Program will provide MLIS students with a grounding in critical librarianship, anti-racist and feminist pedagogy, and tested methodologies for teaching with primary sources online and in person. This program will not only provide graduate students with the skills necessary to lead primary source interactions, it will also provide resources and guidance on how to teach in a way that does not ignore the power dynamics and difficult materials one often encounters when doing so.

Project Design:

We propose an online summer fellowship program that will fill the curricular gap in primary source pedagogy in current MLIS education while building a network of support for new professionals from backgrounds underrepresented in the profession who are interested in the field of library instruction. Our target community for this project is masters students in information and library science programs who are Black, Indigenous, and People of Color interested in library instruction generally and teaching with primary sources specifically, as well as the future user communities whom they will teach.

Modeled on a summer semester, the fellowship will last six weeks, with five weeks of twice-a-week online meetings followed by a three-day in-person workshop at UNC during the sixth week. To ensure the national impact of this program, we will share our resources, products, and contacts with the TPS Collective to provide content for their website, which draws librarians and archivists from around the U.S. interested in the topic of teaching with primary sources. In addition to sharing our syllabus of readings and topics in the summer of 2022, we will also share video recordings of our invited speakers who will lend their expertise to the program. These recordings may be made available on the TPS website during the grant period. By sharing our curriculum and the success of our program, we hope to inspire other libraries to create their own reading and discussion groups based on our curriculum and to incorporate a more critical approach to teaching with primary sources. We also hope that LIS programs in higher education institutions will bring the subject of teaching with primary sources through an anti-racist and feminist lens

into their curricula. At the end of three years, we will assess the success and future support for our program and determine whether to translate it to the national level for future cohorts.

The goals of this fellowship will be to seed the next generation of teaching librarians and archivists with new professionals who are trained in primary source pedagogy and critical theories and who strive to teach historical materials with culturally sensitive methods and serve the information needs of diverse user communities. The program will provide training on teaching with primary sources, critical race theory, feminist and anti-racist pedagogy, and critical librarianship while also building community connections for these students within the special collections profession.

The fellowship program will be offered in summer 2022, summer 2023, and summer 2024. This online program will be based on a training program piloted during the 2019-2020 academic year at Wilson Library to train graduate student staff in primary source pedagogy. The pilot project, led by research and instruction librarian Dr. Emily Kader, had a cohort of six LIS students enrolled at UNC Chapel Hill who met weekly for guided discussions of readings, to hear guest speakers, and to take part in hands-on workshops. Topics included primary source literacy, learner-centered teaching, creating inclusive learning environments, critical pedagogy, lesson planning, faculty engagement, job market preparation, object-based learning, backwards design, assessment, and teaching online. The online fellowship program we propose will modify the pilot to make it more accessible and inclusive for LIS students enrolled in programs across the state of North Carolina, regardless of state residency. The University of North Carolina System serves a rich and diverse community of LIS students with five public masters programs, including one at an HBCU. Serving a cohort of up to ten students a year for three years, the program will bring together fellows from our partner institutions at North Carolina's five public LIS masters programs, housed at Appalachian State University, East Carolina University, North Carolina Central University, the University of North Carolina at Chapel Hill, and the University of North Carolina at Greensboro.

Our goal will be to build a diverse cohort of fellows with a special focus on students from underrepresented groups in the library profession. To help achieve this goal, we will collaborate with an advisory board and an application review panel. The advisory board will consist of faculty and administrators from the five schools, members of TPS, and the University Libraries' librarian for inclusive excellence. To date we have confirmed the following advisory board members:

- Anne Bahde, Rare Books and History of Science Librarian, Oregon State University Libraries Special Collections and Archives Research Center/Member of the Teaching with Primary Sources Collective (TPS)
- Kim Becnel, Program Director and Associate Professor, Library Science, Appalachian State University
- Monica Figueroa, Librarian for Inclusive Excellence, University of North Carolina at Chapel Hill Libraries
- Aisha M. Johnson, Assistant Professor and MLS Program Director, North Carolina Central University
- Barbara Marson, MLS Program Coordinator, Library Science Program, East Carolina University
- Lisa G. O'Connor, Chair and Associate Professor, Department of Library and Information Science, University of North Carolina at Greensboro
- Brian Sturm, Associate Dean for Academic Affairs, School of Information and Library Science, University of North Carolina at Chapel Hill

This board will help us identify potential applicants, promote the fellowship to LIS programs, and review the call for papers and curriculum. Members of the advisory board will be invited to review applications along with a diverse group of librarians and archivists from the University Libraries staff with expertise in the areas of primary source literacy, library instruction, diversity equity and inclusion, and the needs of today's graduate students.

The proposed project will run for three years beginning in September 2021 and ending in August 2024. Below is a timeline of major tasks and events for year one. Years two and three of the project will follow a similar timeline with possible adjustments made after our end-of-year assessment and report.

- September 1-October 1, 2021: Writing call for applications and curriculum
- September 1, 2021-January 15, 2022: Outreach to TPS, advisory board, LIS programs, graduate student groups to identify potential applicants; outreach to potential applicants either directly or through these contacts
- October 1-31, 2021: Provide advisory board and TPS with draft of call for applications and curriculum; meet with TPS and advisory board; begin planning list of potential guest speakers
- November 1-November 30, 2021: Revise call for applications based on feedback; determine review panels
- December 1, 2021: Applications open for electronic submissions via Interfolio
- January 31, 2022: All application materials must be received by this date; team begins outreach to potential guest speakers
- February 10, 2022: Access to the applications is granted to both review panels
- February 28, 2022: Reviews due
- March 14, 2022: Deadline to decide awards
- March 31, 2022: All successful applicants are notified with all paperwork
- April 15, 2022: All paperwork and acceptances are due
- April 29, 2022: Accepting applicants must return all required documentation by this date
- May 29-June 30, 2022: Twice weekly online SCIT meetings with fellows
- July 5-7, 2022: In-person workshops at UNC
- June 12-July 30, 2022: Assessment of program

The core work of the project will be done by a team of three librarians who are full time employees of UNC's Wilson Library.

Emily Kader, the Principal Investigator of this grant, will serve as Project Director and Co-Lead Instructor and will give 20% of her time to the project. Dr. Kader brings 10 years of experience teaching with primary sources in a special collections and university setting, both online and in person. She has taught graduate, undergraduate, K-12, and community groups. She has completed graduate coursework in Black feminist political thought, women's and gender studies, and postcolonial theory, and she has training from the [Racial Equity Institute](#) and UNC's [LGBTQ Center](#). She is completing her second term as on the RBMS Instruction and Outreach Committee, where she has chaired the Teaching the Teacher Subcommittee. As Project Director, she will oversee the team's shared work, including regular meetings, drafting and posting the call for applicants, communicating and coordinating meetings with the advisory board and TPS, researching potential applicants and guest speakers, outreach to LIS programs and library institutions, communicating with the review panel members, and curriculum development. In addition to regular communication, Dr. Kader will use regular communication with the team along with Microsoft Planner and other team tools to ensure the team meets deadlines and stays on track.

Sarah Carrier will serve as Co-Lead Instructor and will contribute 15% of her time to the project. Ms. Carrier brings five years of experience teaching with primary sources in a special collections and university setting, both online and in person. She has taught graduate, undergraduate, K-12, and community groups. Carrier regularly teaches about the history of race in North Carolina, and she is slated to present at the [2021 RBMS annual meeting](#) in a seminar titled "Critical Race Theory in the Primary Source Classroom." Carrier will co-design and co-teach the fellowship's

curriculum in addition to overseeing outreach to potential speakers, scheduling their guest visits, and aiding in communication with review panel members.

Dr. Kader and Ms. Carrier will both be Co-Lead Instructors and will share the work of teaching the curriculum and supporting each other's work with the fellows. As they are most central to the planning and implementation of the project, Dr. Kader and Ms. Carrier will reduce their regular teaching and reference desk time to account for this new work.

Nadia Clifton will serve as Communications Lead and contribute 5% of her time to this project. Ms. Clifton is an alumna of the ARL/SAA Mosaic Fellowship program, where she served as a Graduate Intern at Wilson Special Collections Library's Rare Book Collection. She also has three years of instruction experience with special collections, including online teaching, teaching for disability, and media literacy. As our community and communications expert, she will help the team refine their call for applicants, distribute information about the fellowship, and coordinate logistics for the in-person workshop.

With funding provided by the University Libraries, we will hire a half-time graduate student who will serve as a Project Assistant and will contribute 10 hours a week to help with scheduling, organizing, communication, and logistics. The Project Assistant will also be invited to take part in the fellowship program.

While not a member of the team, Eileen Lewis, Wilson Library's Business Services Coordinator, will support the project by helping to provide administrative support relating to fellowship stipends, honoraria, travel, and other costs relating to the in-person workshop.

To ensure the success and broad impact of the fellowship, we will work with our advisory board to write our call for applications to ensure the language and application requirements meets the needs of our target communities. We will discuss the fellowship and promote the dissemination of the call for applicants and other outreach to appropriate platforms and individual students with the advisory board. We will also seek recommendations from the American Library Association's Spectrum and Association of Research Libraries/Society of American Archivists' Mosaic scholarship programs.

The fellows will be invited to assess the program both midway through the fellowship and again after it is complete. As part of their assessment, they will be asked how the program can be improved and if there is anything missing from the curriculum. Fellows will also be invited to share relevant readings, professional opportunities, and other resources with the group. Bi-weekly meetings will be seminar-style discussions of readings or conversations with guest speakers where fellows can steer the topic so it is relevant to their information needs. Guest speakers will provide ample question and answer time for the fellows.

Another goal of the fellowship will be to build future capacity for teaching primary source literacy within inclusive classroom settings, both in-person and on digital platforms. Using a learning management system, the select cohort of fellows will meet online twice a week for four weeks to discuss shared readings about current topics in the field, attend presentations by practitioners, and take part in community building events. During the online portion of the fellowship, fellows will be asked to design and present a lesson plan around a digitized primary source or collection of sources for feedback from their peers. The online format will enhance the accessibility of the program and will enable sustained participation from fellows from across the state. The program will conclude with an in-person three-day workshop at UNC Chapel Hill where fellows will participate in hands-on learning and teaching activities, in-person discussions, and speaker events. Students will also demonstrate a lesson plan based on a primary source object in Wilson Library's collections. The three-day in-person workshop will be designed to strengthen ties among the fellows, in-person guest speakers, and the librarians and archivists at UNC. The in-person portion of the fellowship will also be designed to give fellows experiential learning and teaching opportunities with primary sources that align with their own interests.

Should conditions prevent us from hosting the fellows in-person, we would re-allocate those funds toward internships for the fellows at institutions geographically close to them. This would allow the fellows to expand their networks and gain professional experience in the field of teaching with primary sources. We would base this internship model on the professional experience of our graduate assistant, who, in addition to supporting the planning and implementation of the fellowship, will participate as a fellow.

The program will keep in touch with alumni of the fellowship, maintaining contact with them and tracking their career progression. Tracking our fellows and assessing how much value they find in the program will help us measure the success of the project. The core mission of this program is to provide professional development and mentoring opportunities for MLIS students, especially those who are underrepresented in the library and archives profession. Professional development and job market preparation will be built into the program to help fellows prepare for the next stage in their careers. As part of the curriculum, we will devote time to analyzing job descriptions and workshopping resumes and cover letters written for the library instruction positions. Through our partnership with TPS, we will encourage fellows and alumni to participate in or contribute content to the TPS Community. We will forge connections between TPS and the fellows by encouraging participation in the annual TPS Unconference, submission of work to their “[Notes from the Field](#)” essay series and “[Teaching Tools Library](#),” and participation in their [Sandbox Sessions](#) and [Community Calls](#). If the fellows and alumni publish, present, or participate in other professional societies and venues, we will also mark this as a measure of success. At the end of each fellowship year, we will write an annual report to share with our advisory board and TPS. This report will include the data we gather relating to the fellowship program and any changes we will make based on our assessment of that data. The annual report will allow us to report on the following information and help us plan for necessary adjustments:

- **Effectiveness: How well do our outputs and outcomes match our project's indicators of success?** We will assess the effectiveness of our program in three ways. First, we will gather feedback from the fellows midway through the online portion of the fellowship and again at the end of the in-person workshop. We will ask the fellows to assess the inclusiveness of the fellowship and what changes they would make to the curriculum. We will incorporate changes to increase the effectiveness of the program. Second, we will track the fellows’ professional progress by sending out a survey to former fellows at the end of years two and three of the fellowship. We will inquire about job placement, publishing, presenting, and service to the profession. Third, we will evaluate the lesson plans and assignments developed by the fellows, share this feedback with them, and adjust the next year’s curriculum based on any gaps we see the fellows’ understanding of pedagogical concepts.
- **Efficiency: How do our project design and project activities optimize available resources and minimize costs?** We have designed this project to take advantage of the University Libraries’ existing expertise and resources. We will rely on the expertise of our instruction librarians to shape the curriculum and mentor the fellows; our community engagement librarian will help us communicate with our fellows and make both their virtual and on-campus experience welcoming and accommodating; and we will craft our program in collaboration with our librarian for inclusive excellence. We will also use UNC’s available online classroom management tool and project planning software at no cost.
- **Quality: How well does our project meet your target audience’s expectations?** We will assess our fellow’s expectations through our annual assessment of the program. However, we hope our program will also reach a broad audience through our collaboration with TPS and the sharing of our program’s products through the [TPS Collective](#) website. We will communicate regularly with TPS through advisory board

meetings, annual reports, and less formal communication to ensure that our products are meeting our national audience's expectations.

- **Timeliness: Is each project task/activity being completed correctly and on time?** Regular team meetings and communication will ensure that each stage of the project is completed on time. We will follow our schedule of completion and use our annual report to make necessary changes to this timeline, if necessary. Online project planning tools and clear deadlines will help the team keep on track.

Diversity Plan: Diversity, equity, and inclusion are core to the mission of this fellowship program. The desired outcome of this fellowship is a rising generation of new librarians and archivists who themselves diversify the field and who have training in teaching with culturally sustaining methods for diverse user populations. The program will reserve at least 40-60% of the available fellowship slots for students from underrepresented groups. To ensure that the project's design creates a learning community that is inclusive, open, and equitable, we will consult with UNC's University Libraries Inclusion, Diversity, Equity, and Accessibility (IDEA) Council on our curricular design. Using our network of connections at LIS programs, libraries, and other cultural institutions across the state to promote the program, we will recruit fellows from underrepresented groups in the library profession. Our advisory board, consisting of LIS faculty from each of the five North Carolina schools, the TPS Collective, and members of our IDEA Council will help us identify candidates. The syllabus of guest speakers and readings will include numerous authors and professionals in the field who are Black, Indigenous and People of Color and people from different types of institutions and geographic locations. A central goal of the fellowship is to provide a diverse cohort of fellows with a network of professional contacts that reflects a range of cultural and professional perspectives. We plan to offer fellows the opportunity to assess our curriculum and classroom community so that they can help us define challenges and opportunities within the program.

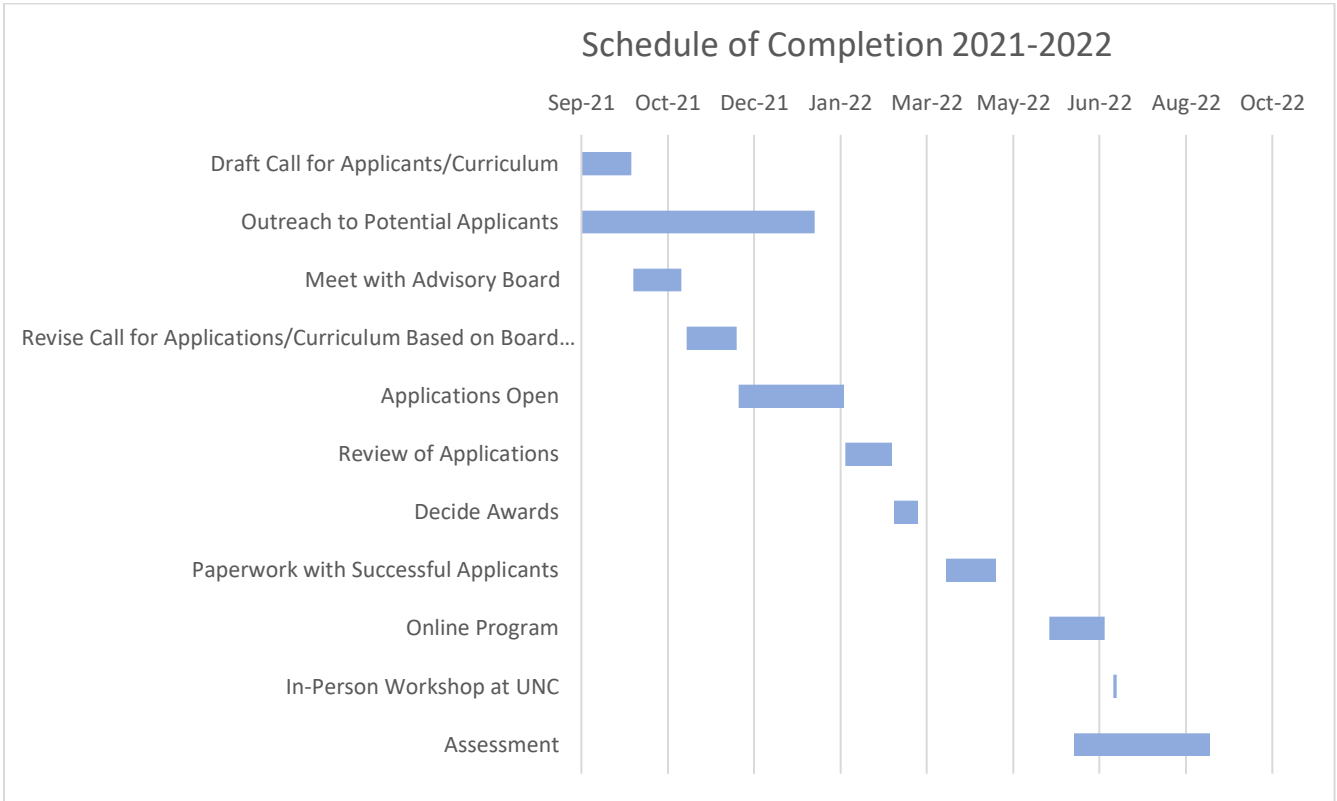
Broad Impact: Our training program aims to have a broad effect on libraries and archives and their ability to hire and retain diverse staff, to serve many different communities, and to educate their publics through K-12, college, university, and community educational programming. Our focus on North Carolina helps us scale up after the success of our pilot program with UNC Chapel Hill's MLIS students. Ultimately our goal is to develop a program that can be implemented regionally or nationally. Toward this effort, we will share our curriculum on the TPS Collective website, at national conferences, and in other professional venues. Through our partnership with TPS, we will encourage our fellows and alumni to submit content for publication on the TPS website and to share their professional experience at TPS events. By promoting our program's curriculum, and through the impact of the fellows themselves on the profession, we hope to lead to systemic change in how librarians and archivists are trained to teach with primary sources and, ultimately, how the profession teaches with primary sources. By involving faculty and administrators at LIS programs and demonstrating our success to them, we hope to influence LIS programs to integrate both teaching with primary sources and teaching through an anti-racist and feminist lens with these materials into their curricula.

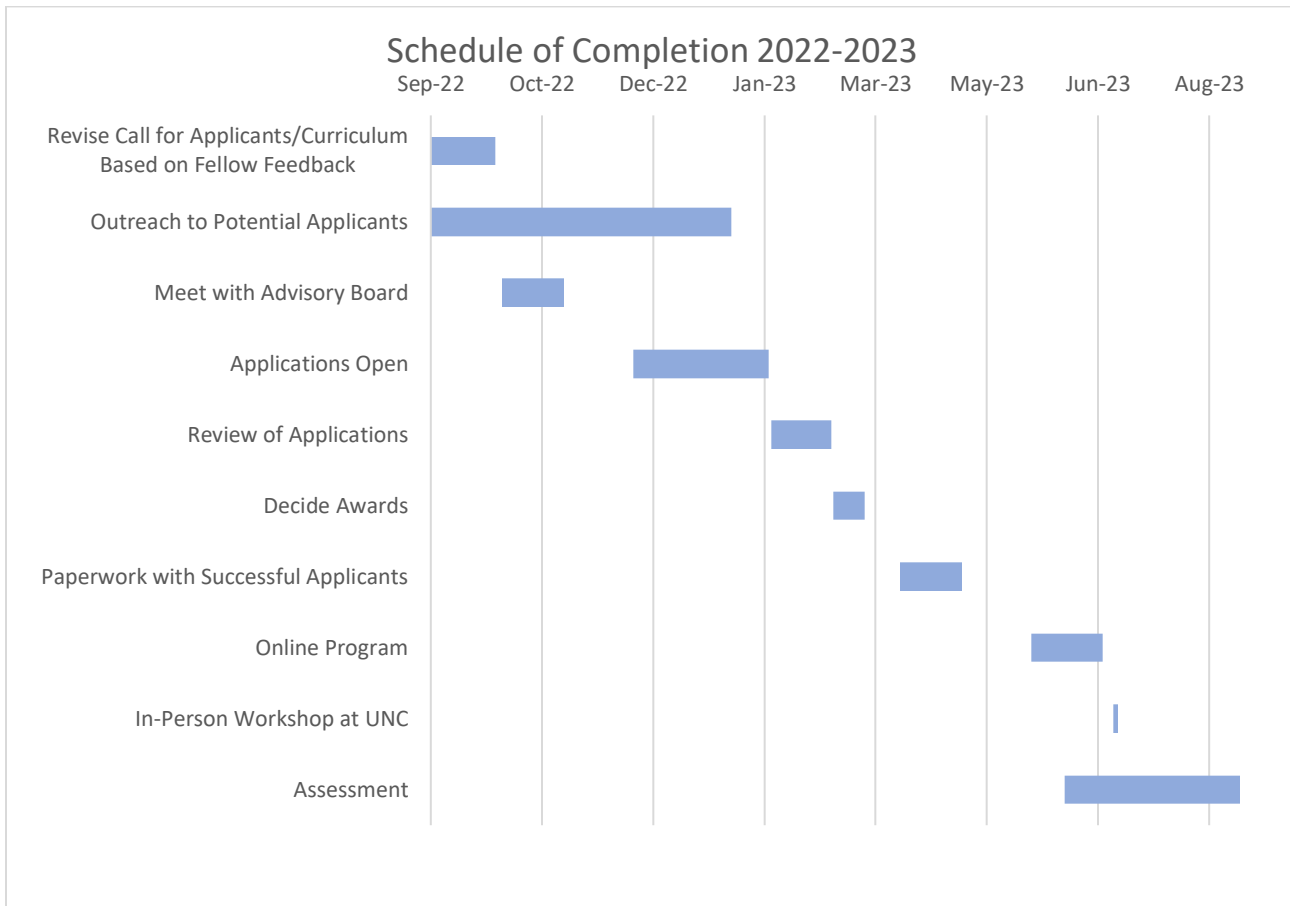
Through conscious design, the program will be readily adaptable and usable by other institutions. A syllabus of topics and readings, designed to inspire discussion of critical questions in the field, will be made available on the TPS website and will make the program accessible to library departments and LIS programs. The goal of sharing this part of the program will be to provide a template for departments and programs to design their own training programs, syllabi, and curricula. We will forge ties between the fellows and TPS so that they have opportunities to share their experiences with the broader professional community, thus making the project and its outcomes widely available. We will also record our visiting speakers and make these available to share online through the TPS Collective website.

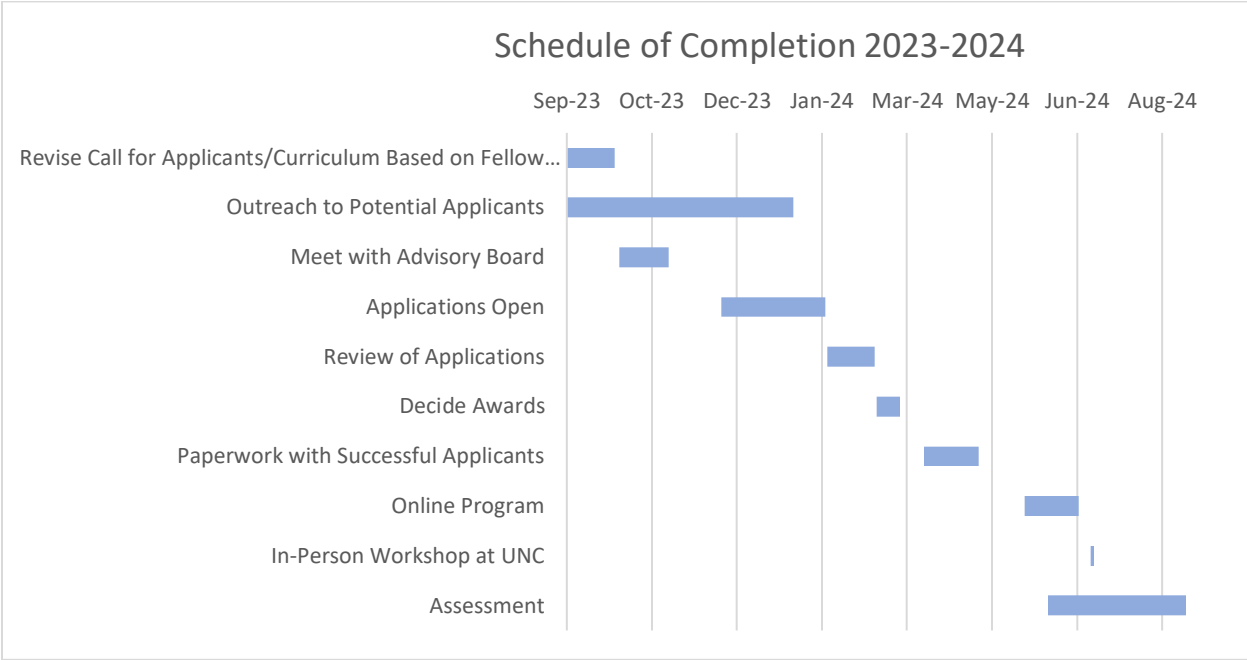
At the end of each fellowship year, we will disseminate our curriculum, assessment findings, and any other products of the program to TPS and our advisory board through an annual report. Any planned modifications to the

program as a result of our assessment will also be included in the report. As the project progresses, the report will include any data gathered about fellowship alumni, including news of job placement, publications, presentations, or professional service. In addition, we will share our findings with the UNC community and the larger academic community through the Libraries website, blogs, and other social media as well as regional and national conference presentation and publishing venues. Should the three-year program be successful, we will consider expanding access to the program at a national level, thereby increasing its impact.

As the program is designed to foster and support future leaders in the field, we hope our alumni will go into their professional careers prepared to train future colleagues, mentees, and student workers in the program's approach to teaching with primary sources. The leadership of our alumni in the profession will be the ultimate measure of our success.









DIGITAL PRODUCT FORM

INTRODUCTION

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

The digital products you create with IMLS funding require effective stewardship to protect and enhance their value, and they should be freely and readily available for use and reuse by libraries, archives, museums, and the public. Because technology is dynamic and because we do not want to inhibit innovation, we do not want to prescribe set standards and practices that could become quickly outdated. Instead, we ask that you answer questions that address specific aspects of creating and managing digital products. Like all components of your IMLS application, your answers will be used by IMLS staff and by expert peer reviewers to evaluate your application, and they will be important in determining whether your project will be funded.

INSTRUCTIONS

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

SECTION II: DIGITAL CONTENT, RESOURCES, OR ASSETS

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

SECTION III: SOFTWARE

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

SECTION IV: RESEARCH DATA

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

SECTION I: INTELLECTUAL PROPERTY RIGHTS AND PERMISSIONS

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

We will create digital content that will include, but will not be limited to: syllabi; reading lists; and video presentations from professionals in the fields of primary source pedagogy, special collections libraries, academic departments, and other relevant areas. We plan to utilize the Attribution-NonCommercial-NoDerivatives 4.0 International (CC BY-NC-ND 4.0) Creative Commons license <https://creativecommons.org/licenses/by-nc-nd/4.0/>. This should enable the appropriate future use in any medium or format of the material for interested individuals by allowing free copy and redistribution, with the appropriate attribution. However, it will prohibit commercial use of the content since we believe that this content should not be behind a paywall. We also believe that a "no-derivatives" clause is appropriate to respect the intellectual creations of multiple contributors.

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.

In line with the Creative Commons license mentioned above, we believe that multiple users should have access to these creations. If used, we would like for the third-parties to alert us of the proposed use and properly attribute the work to UNC Library and any participant. We plan to include the icons and links to explanatory pages on the Creative Commons website on any digital product that is created, including the items mentioned in Section A.1

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.

For any creator, contributor, or other instructional participant (not including fellowship recipients), we will create and provide them with a rights statement and release form based on the Creative Commons license for which we will be applying. Individual fellows will not be shown in any public presentation without their express, written permission, which will be included in any registration packet upon award of the fellowship.

SECTION II: DIGITAL CONTENT, RESOURCES, OR ASSETS

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

We will create reading lists and syllabi that can be shared online through web pages created in HTML through a content management system, such as WordPress. We plan to also record presentations by practitioners and other presenters and share them online through the UNC Library's YouTube channel. We foresee the creation of ten to fifteen video presentations, one syllabus, and one reading list. We will use the Sakai Learning Management software during the fellowship training period, and we will deposit all digital content into UNC's Carolina Digital Repository (CDR), a long-term, open-access digital repository.

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

We will use Sakai, the Learning Management software that is used by UNC to manage its in-person and online courses. Sakai has been used by UNC for several years, and our fellowship instructors are familiar with it through their work with UNC courses and instructors. We will also use both Zoom, an online meeting platform to host remote sessions (if necessary due to the current pandemic or other impediment) and to record that content. If we are able to host the fellows onsite, our Special Collections Learning Center (classroom) has recording capabilities through UNC's Educational Technologies Department.

A.3 List all the digital file formats (e.g., XML, TIFF, MPEG, OBJ, DOC, PDF) you plan to use. If digitizing content, describe the quality standards (e.g., resolution, sampling rate, pixel dimensions) you will use for the files you will create.

HTML, XML, PDF, MP4. Any digitized items will be scanned as PDFs at 300 dpi, color, 100% size. All other files will be born-digital.

Workflow and Asset Maintenance/Preservation

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

Grant staff will work with UNC's Educational Technologies Department for Sakai set up and maintenance and on hardware and software used in our Special Collections Learning Center. Grant staff will review recorded presentations and classroom sessions for content, completeness, clarity, and for accessibility. After upload to YouTube channel and digital repository, staff will recheck to ensure successful transfer from original recording. For web pages that are created, grant staff will edit prior to posting, review content after it is posted, and share with UNC Library accessibility staff for review, including alt-tags for any images and use of a screen reader by fellowship participants or future use.

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

For digital content we create during the fellowship period, our plan is to save the original material in the systems used to create in the applicable cloud storage, but we will also download the content shortly after creation and save it on UNC Library servers. These servers are backed up nightly and are duplicated on servers housed several miles apart. We will also upload the digital assets to UNC's Carolina Digital Repository (CDR), a long-term, open-access digital repository. Deposited materials will be keyword indexed and searchable through the CDR and public search engines. The CDR is designed and operated to ensure the integrity of digital files at a bitstream level. The CDR regularly verifies the integrity of files, maintains a record of preservation-related actions, and employs best practices in the field for persistent storage, including back-up and recovery procedures and geographically dispersed copies.

Metadata

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

The CDR is a Hyrax based repository and uses RDF to store descriptive metadata which is produced on upload. Technical metadata is extracted using FITS and stored in the database. Preservation metadata is also stored in the database and file integrity preservation data is stored in Longleaf preservation tool and the Hyrax database. CDR uses FAST subject headings. Metadata accompanying the data will be submitted by the researcher upon deposit. Deposited materials will also be keyword indexed and searchable through the CDR and public search engines. In the CDR, descriptive metadata is stored as RDF using elements/predicates from a variety of widely used ontologies, including Dublin Core, Schema.org, and the Europeana Data Model. Controlled vocabularies and thesauri in use include ISO 639-2 language terms and codes, DCMI type vocabulary, Geonames, FAST, and RightsStatements.org.

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

The Carolina Digital Repository will ingest and preserve any metadata submitted with the digital content created through this grant.

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

We will upload the digital assets to UNC's Carolina Digital Repository (CDR), a long-term, open-access digital repository. Deposited materials will be keyword indexed and searchable through the CDR and public search engines. CDR content can be harvested via OAI-PMH.

Access and Use

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

We will upload the digital assets to UNC's Carolina Digital Repository (CDR), a long-term, open-access digital repository. CDR is a Hyrax/Fedora based repository with IIIF compliance for image content and the system is optimized to meet web accessibility standards. We will also provide the content on the UNC Library's YouTube channel. Digital content will also be available to our partners, the Teaching with Primary Sources (TPS) collective, at <https://tpscollective.org/> The TPS online hub brings together resources, professional development and support for those who teach with primary sources.

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

Our library has created several guides to highlight special collections resources using Springshare's "LibGuide" software, and an example of this can be seen here: <https://guides.lib.unc.edu/wilson-library-rare-books> In addition, the University Library maintains the Carolina Digital Repository for the long-term storage of born-digital and digitized files. An example of our access system can be viewed at: <https://cdr.lib.unc.edu/concern/multimed5/9w032b68k?locale=en> [This is a Conscious Editing for Racial Equity presentation by one of our staff members.]

SECTION III: SOFTWARE

General Information

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

N/A

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

N/A

Technical Information

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

N/A

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

N/A

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

N/A

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

N/A

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

N/A

Access and Use

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

N/A

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

Name of publicly accessible source code repository:

N/A

URL:

N/A

SECTION IV: RESEARCH DATA

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

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

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

N/A

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

N/A

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

N/A

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

N/A

A.7 Identify where you will deposit the data:

Name of repository:

N/A

URL:

N/A

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

N/A