Intentional Transformation: AMIA Pathways Fellowship

The Association of Moving Image Archivists (AMIA) seeks $249,440 in funding for a 30-month Community Catalyst Project Grant from the IMLS Laura Bush 21st Century Librarian Program. The AMIA Pathways Fellowship (APF) will support paid internships in combination with mentorship and professional development training to forge pathways in the audiovisual preservation field for people from groups historically underrepresented in the profession.

The APF strengthens and expands the 2020 AMIA Diversity and Inclusion Fellowship Pilot Program (ADIFP) which was funded by the National Film Preservation Board (NFPB). Faced with the challenges of the COVID-19 pandemic, AMIA successfully restructured the pilot program, increasing the number of fellows from four to six. These fellows engaged in professional development through webinar training; remote mentorships; office hours with specialists in the field; and three onsite paid internships. All ADIFP fellows will soon participate in an APF alumni program to support ongoing engagement.

This grant from IMLS would expand the program to eight fellows annually, further develop the alumni program, support the contributions of those providing professional development to the fellows, and expand paid internship opportunities to include regional and community-based organizations that house non-traditional media collections and who could not otherwise support paid internships.

Internship hosts Rhode Island Historical Society, California Revealed, and George Blood LLC have expressed their desire to continue as host sites. We are currently recruiting new hosts and have firm commitments from the Smithsonian National Museum of African American History & Culture (NMAAHC), 'Ulu'Ulu: The Henry Ku'ualoha Giugni Moving Image Archive of Hawai'i, the Navajo Nation Museum, and the Texas Archive of the Moving Image.

Statement of Broad Need

In 2019, the NFPB funded a study examining diversity, equity, and inclusion (DEI) in the audiovisual archives field. Qualitative and quantitative data revealed the chronic lack of cultural equity and inclusion in the profession. Among its findings[1], the study determined that those working in audiovisual archives are 17% non-White. For those that identified as Senior Management, only 12.5% are people of color. This lack of diversity has broad and persistent negative impacts on the communities that audiovisual archives serve and are part of, on the collections mandates of both public and private archives and hinders the profession's ability to attract and retain talented new collaborators. While 70% of respondents held a master's degree such as an MLIS or specialized MA in media archiving, and 45% currently work for academic institutions or university libraries, archives, or museums, many reported challenges in receiving adequate training in basic skills related to audiovisual preservation and heritage work. The forthcoming NFPB DEI report to the Library of Congress recommends: advocating for dedicated scholarship funding for students from underrepresented backgrounds; developing a field-wide paid internship program that is inclusive of trainees of different ages, levels of experience and backgrounds; and supporting underrepresented individuals along their career pathways. AMIA's Pathways Fellowship program directly addresses these key recommendations.

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[1] These top level survey results are not yet published but are attached as a supporting document

To address the findings of this study, the NFPB funded a grant through the Council of Library and Information Resources (CLIR) for the AMIA Diversity and Inclusion Fellowship Pilot Program (ADIFP) for six fellows during 2020[2]. The ADIFP was informed by previous experiential and cohort-based learning initiatives[3]; in turn, it informs our plan for the work described in this proposal-- an expanded and ongoing annual program of paid professional opportunities, mentorship, and institutional collaboration aimed at gradually but permanently transforming the landscape of the audiovisual archives field.

Project Design
As aforementioned, this project will expand upon the successful 2020 ADIFP pilot. Though the program experienced unexpected restructuring due to the onset of COVID-19, including previously committed partners Smithsonian NMAAHC and Uluʻulu Henry K. Giugni Moving Image Archive unfortunately needing to withdraw due to the pandemic, it was nevertheless overwhelmingly successful, providing paid fellowship opportunities to three of six early career audiovisual archivists through three internship partners: George Blood LP, Rhode Island Historical Society and California Revealed, while the other three fellows participated in the program remotely. Post-program surveys are currently being performed by Dr. Brian Real, Assistant Professor of Information and Library Science, Southern Connecticut State University. Dr. Real will perform qualitative interviews with each of the first year fellows in which he will ask about the quality of their experiences in the program and whether they believe the activities they took part in served as effective means to prepare them for a career in audiovisual archives and preservation.

The successes of the ADIFP will be leveraged into an expanded model in the APF, featuring a similar programmatic design with a few notable evolutions. While the pilot focused on recruitment of People of Color, the APF program will additionally seek to expand its reach to also prioritize Native and Indigenous applicants, and those that have disabilities and who are neurodivergent. This key development will be supported by efforts already in place at AMIA, spurred by a NFPB focus group devoted to "Visible and Invisible Disabilities", a "Pacific Rim International Conference on Disability & Diversity" panel participated in by APF Project Director Teague Schneiter[4], and the findings of our first-ever salary and demographic survey, which is pending publication indicated that 17% of our 545 respondents are neurodivergent or have another form of disability.[5] Furthermore, because audiovisual collections are not unique to traditional LAM institutions but rather exist in diverse communities and cultural institutions in all areas of the country, the APF will shift into an expanded focus on connecting at least half of the fellows with internships in regional or community archives, but how these often small and understaffed archives cannot support dedicated workers that have audiovisual specialized skills. Finally, the onset of the COVID-19 pandemic forced us to swiftly and nimbly recalibrate many aspects of the program. We did this successfully, allowing us to demonstrate not only the

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[2] For additional detail, see https://amianet.org/about/amia-diversity-and-inclusion-fellowship/
[3] These models include the National Digital Stewardship Residency program (https://ndsr-program.org/), the Academy Gold Program for talent development and inclusion (https://www.oscars.org/learn/academy-gold-program), UCLA's Community Archives Lab (https://communityarchiveslab.ucla.edu/), the ARL/SAA Mosaic Program
[4] https://pacrim.coe.hawaii.edu/events/opportunities-and-obstacles-representations-of-disability-in-film-and-media/
[5] These top level survey results are not yet published but are attached as a supporting document

adaptability of the program but, as we've moved increasingly into a virtually connected world, prove that it may actually be strengthened by the incorporation of remote work and the breakdown of geographic barriers regarding optimal matching of participants with host sites.

The APF identifies sixteen committed individuals, over two cohorts, from underrepresented groups and provides paid internships (30hrs/week for 10 weeks) to support them financially as they expand their field knowledge and fosters their career networks at a pivotal stage of professional development. Fellows will receive hands-on training with analog and digital audiovisual materials, encompassing core competencies such as format identification, cataloging, digital asset management, digital preservation, and access. APF supports the fellows and the host sites through one-on-one mentorship, weekly webinars on specific skill sets, cohort-building activities, and the support of a larger network of specialists from the AMIA community. APF directly and positively impacts the fellows and the host sites, creating working partnerships that will endure long beyond the term of this project.

Fellowship Projects and Activities
During the fellowship period, APF fellows will participate in weekly webinars, alternating skill-building topics in core and specialized technical competencies with broader, more conversational presentations from professionals working across the field. Instructors of webinars will be paid for their time and for development of curriculum materials for use in continuing professional education. This project component intentionally supports broader engagement with the community of audiovisual archives and archivists—an outcome cited as missing, but highly desirable, by participants in some of our model programs. It will enable fellows to hear from practitioners who are at different stages of their careers, and who are involved in many different kinds of media preservation work. Moreover, it will allow input from practitioners whose experiences and knowledge can be invaluable to the fellows, but who may be unable to commit uncompensated time to serve as project mentors or hosts. Including a lightweight evaluation and feedback framework in the weekly webinars will enable collection of qualitative data on fellows' learning, and support a nimble response to articulated or observed needs within the fellowship cohort. Specific webinar topics will revolve around issues of cultural competency, leadership and management, cataloging, web accessibility, anit-racist practices, and disability awareness. At least four of these webinars will be Equity, Diversity and Inclusion (EDI) specific.

The project advisory board will work with prospective sites to help scope fellows' primary projects, identify competency-based learning objectives, and develop appropriate frameworks for feedback and evaluation. Fellowship projects and activities might include, but not be limited to,

- Conducting surveys to identify and describe audiovisual holdings in collections throughout a larger institution
- Preparing media collections for digitization
- Inspecting, cleaning, rehousing, and doing basic cataloging or collections processing
- Developing or updating cataloging standards for audiovisual materials
- Conducting research
- Creating audiovisual preservation and digitization workspaces, or building out capacity in existing workspaces
- Drafting documentation and developing project workflows

- Planning virtual or physical exhibitions based on audiovisual collections, or other programming and access activities

In addition to work on their primary projects, fellows will devote a portion of their weekly hours to participating in skill-building webinars and "Open Format Sessions" conversations with experts from across the field. They will also be encouraged to set up dedicated ways and regular times to communicate with one another as a cohort. Whether these communications occur through private Slack channels, in-person meetups, or virtual hangouts, alumni of NDSR and other model programs report significant benefits from having safe spaces to talk through issues with their peers as they arise in the workplace. Program alumni also cite their supportive cohort relationships as among the most valuable takeaways from their fellowship experiences.

Recruitment of Host Sites, Fellows, and Mentors
In the initial phase of each annual recruitment cycle, host sites are invited to apply and publicize their fellowship opportunities through the program. Sites will be solicited through a range of outreach efforts:
- Ongoing, open call for inquiries/expressions of interest posted on the AMIA web site, listserv and social media accounts, with requests for signal-boosting from sister organizations and strategic partners
- Targeted outreach to a range of partner sites, including members of Association of Tribal Archives, Libraries, and Museums (ATALM) and those who expressed early interest in the ADIFP pilot program, but lacked internal funding to support a paid position in 2020
- Direct communication with community-based archives projects, such as those with funding from the Mellon Foundation's Support for Community-Based Archives initiative, which may have recently identified need for specialized assistance with audiovisual materials in their collections

Host sites must demonstrate commitment to project goals, and must prioritize interns' learning and professional advancement. Additionally, all host institutions will participate in a forum on inclusive hiring practices to ensure sites are in alignment prior to applications being posted. Participating sites and internship supervisors will be directed to the best practices information and guidelines developed by the model programs previously cited, and will be encouraged to reflect on the ways in which their local practices and workplace culture might become more inclusive.

While the funding available is based on an anticipated eight fellows per cohort, the total number of fellows may be larger if sites with existing paid internship programs apply to be included in the program. We anticipate limiting the total number of fellows per cohort to approximately 8-10, however, to ensure adequate coverage with mentors and individualized support, and to support peer mentoring and bonding within the fellowship group.

Once host sites are selected, their project opportunities will be listed on the AMIA site and fellows will be invited to apply for the openings. As with past NDSR programs, applicants will be asked to specify up to three ranked preferences among the available opportunities. In addition to promotion by the host sites themselves and by AMIA through the channels described above, recruitment of fellows will include such activities as:

- Broad outreach to graduate and professional degree programs, undergraduate programs, community colleges, HBCUs, Tribal Colleges. Collaboration with ATALM will assist with the identification of priority tribal/indigenous archives and collections most in need of help, while partnerships with HBCU's including Spelman College and the Atlanta University Center Art History + Curatorial Studies Collective, the latter of which was established with the purpose of preparing the next generation of undergraduate students at the nation's largest HBCU network for careers in the museum and arts industry, will assist with outreach to these communities
- Initiatives such as the iSchool Inclusion Institute (i3) to encourage awareness of and participation in the fellowship program
- Outreach to professional organizations in other disciplines (such as the media production guilds and trade unions, public and oral historians, media studies, etc.) where teachers or supervisors may be able to help us connect with interested applicants not otherwise connected with the audiovisual archives community

Following the model established by the NDSR programs, applicants will be asked to rank up to three preferred sites, and to indicate if there are factors that might make only one or a few of the opportunities accessible to them (which should weigh in evaluation of the applications by host sites, in consultation with project advisory board members).

Just as the participating sites and projects inform the recruitment of each cohort of fellows, the needs of each cohort—and the individuals that make up that cohort—will inform the process of mentor recruitment and ongoing support for program participants. For the ADIFP pilot project, initial outreach to potential host sites and recruitment of applicants for the fellowships has yielded a number of people interested in participating in the project as mentors, teachers, or in other supportive roles. APF announcements at all stages will include solicitation for potential mentors to be in contact ("If you are interested in supporting the AMIA Pathways Fellowship program as a mentor for emerging professionals from underrepresented backgrounds, please visit…"). The member networks of AMIA, its APF project partners and collaborators, and regional archives associations in the areas where host sites are located will all be leveraged for outreach to potential mentors. Calls for participation may highlight qualities and qualifications which are of particular relevance for the current cohort.

Potential mentors will be invited to provide additional information about their professional background, personal characteristics, or areas of interest and ability in the field to support matching them with fellows as early as possible in the process. Mentors will be compensated for their time, and both mentors and fellows will be provided with guidelines and suggested practices for getting the most out of their support networks during and after the fellowship period.

Mentorship is not a one-way street; while mentees report a range of benefits from supportive relationships with senior colleagues, mentors also value the opportunities these relationships afford for staying current with a rising generation of colleagues, and for reflecting on their own practices and experiences in the field. Reporting and feedback from project mentors on the impact and value of their mentoring experience with the fellows will inform recruitment for the

second round of fellowships, and will be included in final project reporting. Additionally, a key deliverable from the Mentorship portion of the APF will be an expanded version of the "Mentorship Handbook"[6] initially developed during the ADIFP. This handbook, designed as an easily adaptable tool, has already been distributed to partners throughout the field with whom we are in active dialogue, and is being used to develop a broader AMIA mentorship program.

Beyond the Fellowship
Fellows will be funded to attend the AMIA conference in the fall following their internship experience, at which time they will present at the conference in panel sessions or poster presentations, meet with mentors in person, further broaden their networks, and share outcomes while presenting at the conference. Additional professional development funds will be allocated for each fellow to be used at their discretion, with their mentors assisting them in identifying learning opportunities and setting priorities for use of their funds. Fellows will be asked to provide brief justifications for their professional development spending, and to report within their cohort on outcomes and benefits of their experiences, as is typical in professional settings. Reporting on outcomes for this project will include description and qualitative analysis of the impact of the guaranteed funding and guidance for professional development.

Particular effort will be devoted to sharing information about the committee structure and leadership models of AMIA and other professional organizations. Fellows will hear from mentors and guest speakers how their service work on projects, committees, task forces, etc. contributes to the field, and learn about how such work builds resumes and broadens professional networks. Committees and interest groups such as AMIA's Advocacy, Independent Media, International Outreach, LGBT, Oral History, and Regional Audiovisual Archives Committees, in addition to an APF alumni program, will serve as continuing sources of camaraderie, mentorship, and support as APF fellows continue establishing their careers in the field. Furthermore, these are among the capacities in which fellows might explore alternative approaches to leadership roles, and can have a direct and meaningful impact on the field through the work of the organization and its members.

Along with other members of the audiovisual preservation and cultural heritage communities, we will work to develop opportunities for fellows to apply their skills in longer-term/permanent or project-based placements in community-based archives where there is significant need for the skills cultivated among the APF fellows. These placements might include work with a designated consulting partner, where fellows could be fairly paid for consulting work while receiving additional mentoring and supervision from a senior consultant on inventories, needs assessments, digital archiving initiatives, or other projects where archival skill sets can be applied in entrepreneurial ways. We are exploring options for collaboration in this way with one or more consulting partners.

Additionally, the APF is poised to benefit from potential partnership with the WGBH Media Library & Archives Public Broadcasting Preservation Fellowship (PBPF) program which, if also funded by IMLS, will collaborate on several initiatives during our tandem projects, including the creation of a shared Slack/Discord channel for fellows in both fellowships, roundtables and

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[6]https://amianet.org/about/amia-diversity-and-inclusion-fellowship/mentorship/

events with alumni from both programs designed to share experiences and lessons learned, co-submission of applications for conference presentations and collaborative publications.

WGBH has been a heavily involved institutional member of AMIA for nearly three decades, with robust cross collaboration between the two organizations even extending to the scholarly publication field.[7] Most notably, key members of the PBPF have recently sat on the ADIFP Task Force. The APF and PBPF partnership would build on this established relationship and programmatic similarities, but would also find strength in its disparities, as the PBPF not only follows a universal curriculum (unlike the APF) but focuses specifically on public media and will attract a diverse cohort of participants working with a different scope of audiovisual materials. This potential collaboration would provide opportunities for fellows across various programs intended to increase equity in the field to connect with each other and build a broader cohort and community, and contribute to our overall goal of intentional transformation of the broader field through collaborative effort.

Evaluation
As previously mentioned, post-program survey results from the ADIFP are currently pending. However, these same metrics will be administered to APF participants and leveraged to gather specific data on the four IMLS performance measures as indicated below:

Effectiveness	Four surveys will be administered to key stakeholder groups--including fellows, host sites, advisory board members and mentors-- throughout the duration of the program: at the outset, following the curriculum individual webinars, at the end of the program, and six months-post cohort. These surveys will gauge program successes and needs for improvement at several different stages of the program, allowing for continuous refinement as the program evolves. Additionally, Dr. Brian Real plans to disseminate survey results through a peer reviewed article based on his findings.
Efficiency	Stakeholders will continually refine processes and workflow in project meetings, measuring key performance indicators (KPI's) to make project improvements. Quarterly meetings will assess best practices in development and key findings of ongoing surveys in order to refine program efficiencies.
Quality	The post-program survey administered to the departing cohort six months post-program will ask questions about how the alumni program has worked for them, whether or not their mentorship has continued, and, with foresight, any improvements they suggest. This will not only allow us to continue improving upon the quality of the program but give us an opportunity to track important program metrics regarding how the APF experience continues impacting participants careers after the program has ended.
Timeliness	The pre-program survey administered to both fellows and mentors prior to the program will at the outset gauge the needs of all participants regarding

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[7] https://www.tandfonline.com/doi/full/10.1080/15332748.2020.1769995

	mentorship relationships, individual knowledge gaps, and curriculum. The findings of this particular survey will directly impact program design, ensuring that individual needs of fellows, mentors and host sites are met from program outset.

Project Team
In order to effectively design and carry out the program, the APF team will consist of a Project Manager (PM), Mentorship Program Coordinator (MPC), Curriculum Coordinator (CC) and a five-member Advisory Board, led by the Advisory Board Chair (ABC). The Advisory Board will be formed by the ABC and will represent a broad range of constituencies. The Advisory Board will ensure inclusive selection criteria for the fellows and host sites, provide outreach, and guide the implementation of the APF program objectives.

The PM will ensure that the APF achieves its strategic objectives while staying on time and within budget and manage the fellows recruitment and selection process, including targeted outreach to Tribal Universities, HBCUs, community colleges, and schools with diverse student bodies. The MPC will work under the direction of the PM to engage a group of mentors who have shared intersectional cultural affinities with the selected fellows. The MPC will help to further develop the Mentorship Handbook, provide leadership, training, and guidance for the program's mentors and mentees, and lead the development of an alumni program. Finally, the CC will develop the webinar schedule, and organize pre-fellowship training for mentors and host sites on topics such as effective mentorship, inclusive leadership, hiring practices, and cultural competency.

Diversity Plan
Our proposal is driven by the crucially important goal of growing diversity at all levels of the media archiving profession and expanding the profession's impact to underserved communities. Our Advisory Board will guide our selection criteria for fellows, mentors and instructors, ensuring we remain focused on our objective.

The 2019 NFPB DEI study that informs this project, which has been submitted to the Librarian of Congress and is pending publication, examined a broad range of diversity factors. They include (but are not limited to):
- *Educational background* – As specialized graduate degree programs in media archiving and preservation have emerged and contributed to the professionalization of the field, so have concerns about the barriers to entry created when the minimum qualification for an entry-level job is a master's degree. Graduate programs require a commitment of time and money that is prohibitive for many. This can disproportionately affect people of color and those with Indigenous backgrounds.
- *Geographic location*—The map of ALA-accredited LIS degree programs shows heavy concentration in coastal areas; New York and Los Angeles have for over a decade been the opposing poles of specialized education in audiovisual preservation. High-quality paid internship opportunities also tend to be concentrated in major metropolitan areas. These opportunities are prohibitively difficult for students from more remote and rural areas to access.

- *Intersectional identities and representation across the field*: 60% of the NFPB DEI survey respondents who identified as senior management were female, nearly equal to the percentage of women in the field overall, yet only 12.5% of senior managers were people of color (versus 17% non-white representation in the field overall), indicating that advancement into leadership roles is an intersectional issue.
- *Caregiving responsibilities*: Child, elder, or other dependent care responsibilities are a further barrier to career advancement for many. Offsetting costs of care and reducing the expectation that early-career qualifications will be gained through uncompensated internships or volunteer experience outside of school and working hours is essential to including caregivers in the ranks of those who care for collections, too.

The relative weight and value of the aforementioned factors are criteria that continue to inform the decision making process of the APF Advisory Group, and we expect to return to them frequently as a community of practitioners throughout the course of this project. Furthermore, the creation of a diverse Advisory Board, coordination with AMIA committees and external partners, and ongoing review of diversity and recruitment efforts across the cultural heritage field will continue to inform our efforts. However, the APF application will follow the model of the ADIFP in that it did not define "underrepresented" community, but rather asked applicants to seek AMIA's Statement on Diversity, Equity and Inclusion[8] in crafting their application, purposely leaving that interpretation open ended to provide applicants the opportunity to themselves determine the ongoing diversity needs of the audiovisual preservation field.

Broad Impact
The 2020 ADIFP pilot year insights are significant: engaging a diverse cohort of fellows not only jumpstarts careers and establishes a long term career pipeline for participants but brings new voices and perspectives to the field. The relatively small size of the audiovisual preservation field means that a small pool of professionals has the power to vastly increase cultural equity and representation, establishing not only career success for the participating fellows but fundamental long-term transformation of the landscape of the field. By extending the project over multiple years, increasing the cohort size, and developing an alumni program, we can leverage the confidence gained from a successful pilot to spark significant long-term change by empowering a diverse new generation of audiovisual preservationists and heritage professionals, in turn empowering the communities for which their work will advocate. If funded, by 2024, this program will have graduated 22 fellows, establishing significant pathways into eventual leadership positions in the audiovisual archives community.

Why This Project
The urgency of the media loss crisis is well understood throughout the audiovisual preservation field, even now extending to magnetic media, as the "Deadline 2025: Collections at Risk" report released in 2015 by the National Film and Sound Archive of Australia warns that "There is now consensus among audiovisual archives internationally that… tape that is not digitized by 2025 will in most cases be lost forever."[9] However, the APF seeks to respond to this urgency specifically by addressing how, to what end, and by whom our fragile and time-sensitive audiovisual collections are preserved.

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[8] https://amianet.org/wp-content/uploads/AMIA-Statement-on-DiversityDUPE-1.pdf
[9] https://www.nfsa.gov.au/corporate-information/publications/deadline-2025

While media loss is widespread and universal, the crisis is particularly urgent in smaller, community based archives who typically have fewer resources and contain collections from underrepresented communities. While the APF emphasizes the urgency of preserving these rapidly deteriorating collections at this moment in time, it also takes the position that members of underrepresented communities should be empowered to steward, preserve, take ownership of and tell their own stories. This is particularly true in indigenous and tribal communities worldwide, who have been taking steps to reaffirm control over the images and sounds of their communities, but facing the challenge that their materials often remain in archives, museums, and libraries outside of tribal communities and in the care of non-tribal archivists.[10] The APF seeks to create pathways for students from these underrepresented communities, particularly those who do not have formal audiovisual archives training in their curriculum and, through a pipeline program that gradually shifts the field in terms of cultural competency, embolden a diverse new generation of audiovisual preservationists prepared to tackle these challenges.

As with the ADIFP, the findings and deliverables of this program are intended to be shared, and materials and guides developed for the project will be disseminated throughout the field, on the AMIA website, and among the other fellowship institutions. Additionally, key project findings will be published in The Moving Image[11] by various stakeholders, including an article on the field-wide development of inclusive hiring practices.The materials developed for the ADIFP are already serving as a model for other organizations building mentorship programs, and the ADIFP Interim Report has been used to begin conversations and advocate for paid internship programs. It is our hope that by continuing this model and sharing the findings and resources of the APF, we will broaden this impact, encouraging other organizations to develop their own internship, mentorship or fellowship programs.
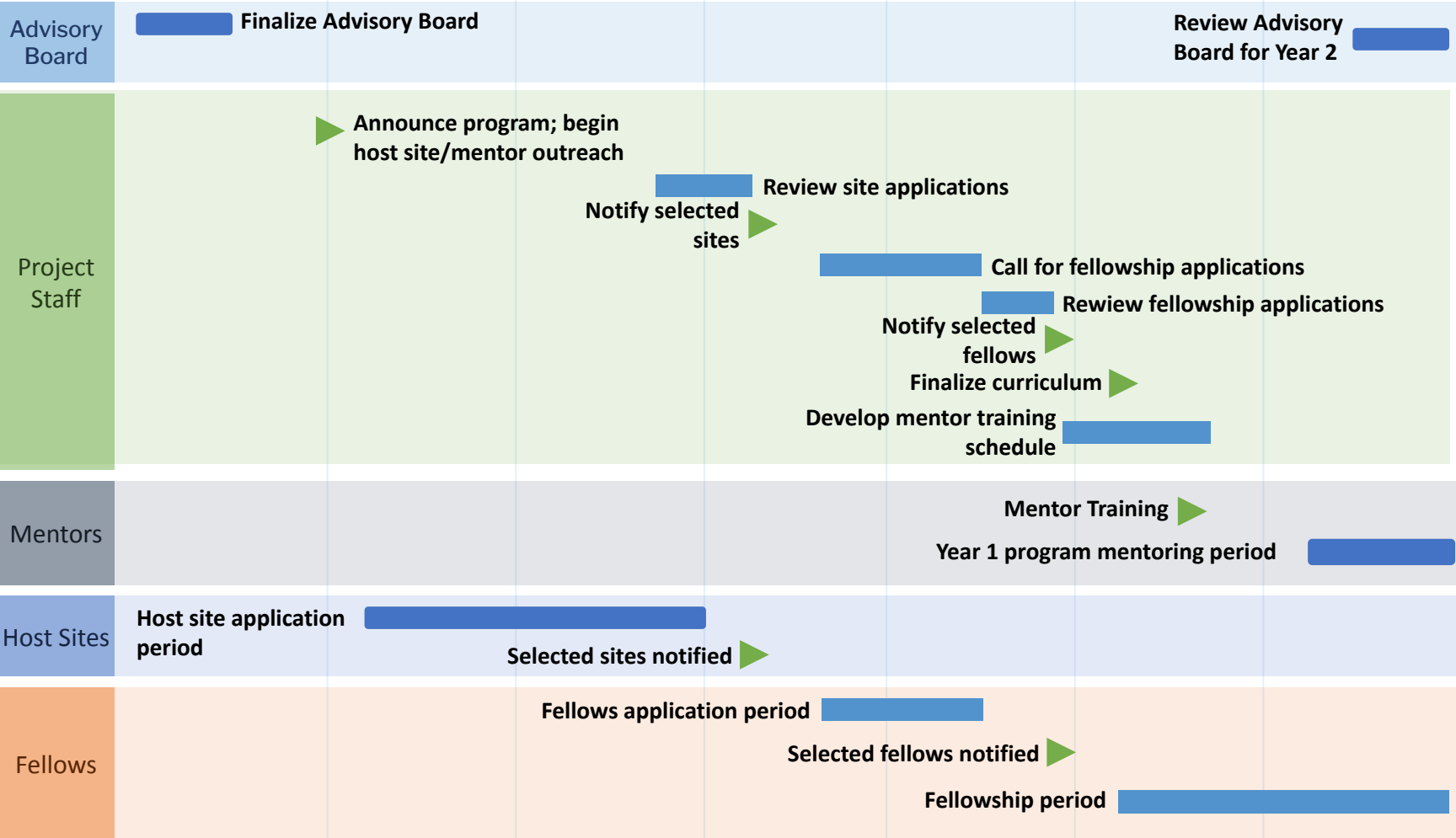
Conclusion
The APF boldly asks what emerging professionals can contribute to the work of established and non-traditional media collections when they have generous funding for professional development early in their careers, supportive mentors and a framework for continuous learning, active recruitment in their chosen career, and the long-standing barriers to their entry and advancement are systematically addressed. Ultimately, grant funding from IMLS will enable AMIA to evolve our developing fellowship initiative into a sustainable model that has lasting effects on the profession and the collections we steward. APF will be pivotal in establishing a more diverse and more societally representative workforce of audiovisual heritage professionals prepared to steward our collective media heritage.

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[10] https://digitalcommons.usu.edu/cgi/viewcontent.cgi?article=1051&context=westernarchives
[11] https://amianet.org/resources/moving-image-journal/

Program Year 1: Sep. 1, 2021-Aug. 31, 2022

Notification of funding award
Jul 1

Project start date
Sep 1

2021 AMIA Annual Conference
Nov 11

2021

2021

Jul	Sep	Nov	Jan	Mar	May	Jul

Advisory Board

Finalize Advisory Board

Review Advisory Board for Year 2

Project Staff

Announce program; begin host site/mentor outreach

Review site applications

Notify selected sites

Call for fellowship applications

Rewiew fellowship applications

Notify selected fellows

Finalize curriculum

Develop mentor training schedule

Mentors

Mentor Training

Year 1 program mentoring period

Host Sites

Host site application period

Selected sites notified

Fellows

Fellows application period

Selected fellows notified

Fellowship period

Program year start date
Sep 1

2022 AMIA Annual Conference

AMIA – RE-248919-OLS

Program Year 2: Sep. 1, 2022-Aug. 31, 2023

2022   2023

Aug | Oct | Dec | Feb | Apr | Jun | Aug

Advisory Board
- Contribute year 1 assessment/outcomes data

Project Manager
- Contribute year 1 assessment/outcomes data
- Announce Year 2; begin host site/mentor outreach
- Review site applications
- Notify selected sites
- Call for fellowship applications
- Rewiew fellowship applications
- Notify selected fellows
- Finalize mentor matching
- Develop Year 2 webinar schedule

Mentors
- Year 1 mentoring period
- Contribute year 1 assessment/outcomes data
- Year 2 program mentoring period
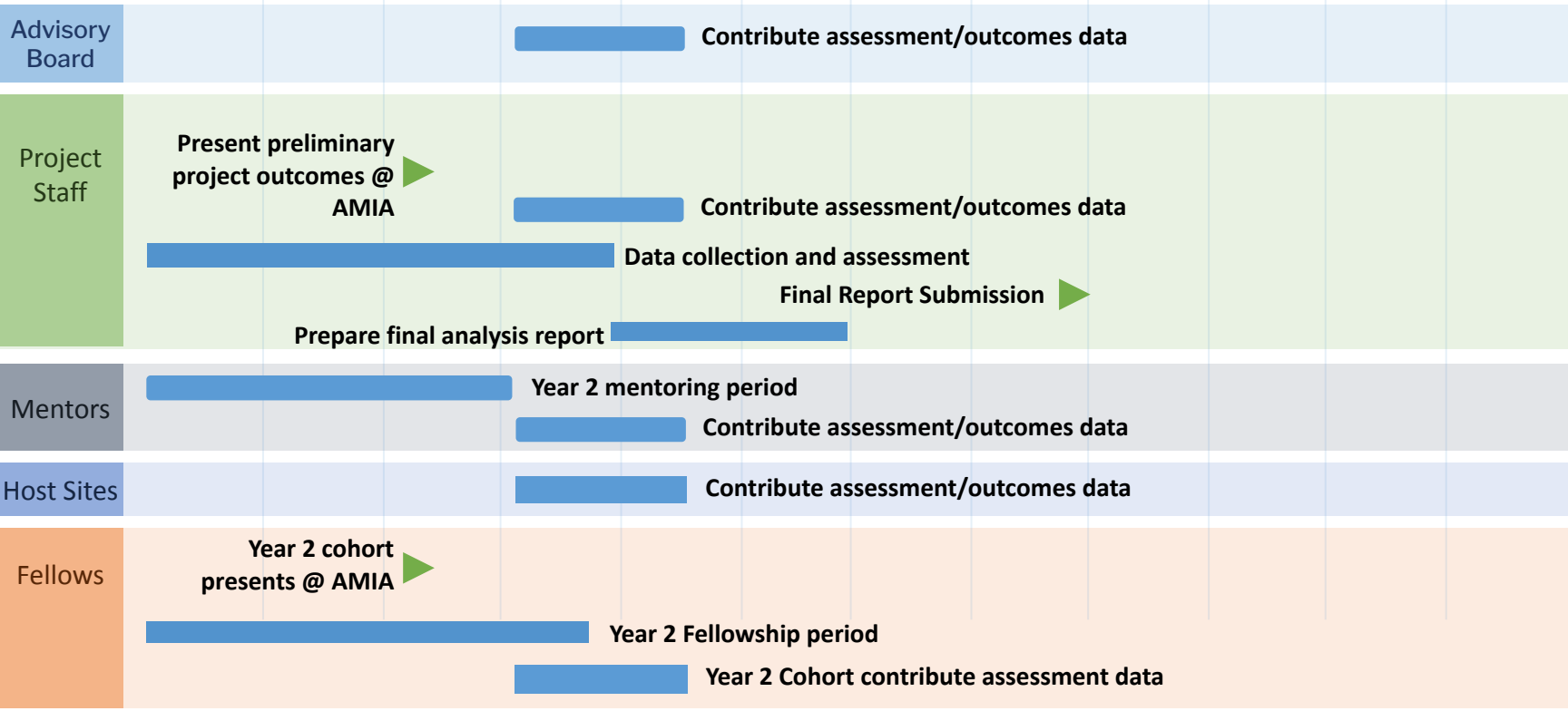- Year 2 Mentor Training

Host Sites
- Application period
- Year 2 selected sites notified

Fellows
- Year 2 Fellows application period
- Year 1 cohort presents @ AMIA
- Selected year 2 fellows notified
- Year 1 Fellowship period
- Year 2 Fellowship period
- Year 1 Cohort contribute assessment data

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.

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

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

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.

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.

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.

Workflow and Asset Maintenance/Preservation

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

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).

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).

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

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

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).

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.

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.

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.

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.

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

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

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

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

Access and Use

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

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

Name of publicly accessible source code repository:

URL:

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.

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

A.3 Will you collect any 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.

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

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?

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

A.7 Identify where you will deposit the data:

Name of repository:

URL:

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