

EXCITE Transformation for Libraries

Abstract

ALA's "Libraries Transform" public awareness campaign implies both that libraries transform the lives of patrons and that libraries are transforming as organizations with new services and ideas. For this to happen, librarians must transform themselves by learning new skills and developing a mindset that encourages innovation and experimentation at their libraries.

In order to cultivate the next generation of library leaders and to improve northeastern librarians' skills in leadership and community engagement, the Connecticut State Library (CSL) requests \$387,250 in grant funding, matched by \$401,584 from CSL, partners, and participants, to lead a two-year (October 2017 – September 2019) team-based experiential learning program with partners Innovation Builders (IB) and TechInPedagogy. CSL will offer multiple progressive, in-person training and coaching sessions for as many as 96 participants from up to 18 public, academic, and special libraries.

EXCITE Transformation for Libraries will help build library leaders who are true collaborative innovators, result in new grant funded programs and services that uncover and respond to community motivations and needs, bring more community members to the library to connect and collaborate, lead to cultural change at libraries, and sustain project impact through extended training.

In the EXCITE Core Program, participants will complete three multi-day in-person training sessions – Bootcamp, Design and Transform, and Program Implementation – with two months of fieldwork between each session and six months afterward for implementation of a new program or service developed during the sessions. Throughout, IB will provide additional coaching and mentoring. CSL will offer scholarships and seed grants to help teams attend and help them implement their new programs.

Teams from all types of libraries (urban and rural public, academic, and special) with participants at all career levels may apply through a competitive process. Through this training program, participants will

- Engage their communities in exploratory conversations and activities that allow them to gain deep insight into their patrons' motivations and underlying needs.
- Collaborate with their colleagues and partners to generate new, innovative, and transformational ideas that can address those community needs.
- With their communities, iteratively design programs, services, and spaces that "bring community members together at their libraries to connect and collaborate in a meaningful and enjoyable way."
- Develop business plans that consider factors crucial to successful implementation and enact their programs at their libraries.

To extend the project benefits and to reinforce the impact on the libraries' culture of collaboration and innovation, IB will offer two additional training opportunities. Standalone EXCITE Bootcamps will be offered for participants from libraries that have already sent teams to the Core Program. Also, IB will offer intensive EXCITE Facilitator Certification training for 6-8 participants who have already completed the Core Program. They will learn to facilitate a fueled ideation cycle within libraries in order to create additional transformative programs. The training will create a pool of librarians in the northeast library community who can replicate these ideation practices elsewhere.

Outcome 1: 100% of participants will indicate an increase in skills and indicate confidence that they will apply what they learned. *Outcome 2:* Organizational culture at 90% of participating libraries will change, as shown through cross-department collaboration and the use of newly learned techniques in everyday settings. *Outcome 3:* 100% of new programs and services will improve partnerships, patron participation, and patron benefits.

EXCITE Transformation for Libraries

INTRODUCTION

In order to cultivate the next generation of library leaders and to improve northeastern librarians' skills in leadership and community engagement, the Connecticut State Library (CSL) requests \$387,250 in grant funding, matched by \$401,584 from CSL, partners, and participants, to lead a two-year (October 2017 – September 2019) team-based experiential learning program with partners Innovation Builders (IB) and TechInPedagogy. The program, EXCITE Transformation for Libraries (EXCITE), will help build library leaders who are true collaborative innovators, result in new grant funded programs and services that uncover and respond to community motivations and needs, bring more community members to the library to connect and collaborate, lead to cultural change at libraries, and sustain project impact through extended training. The curriculum was developed based on lessons learned and feedback from a successful full-scale pilot, funded by LSTA, with teams from seven Connecticut public libraries from October 2016 – Summer 2017.

1. STATEMENT OF NEED

ALA's "Libraries Transform" public awareness campaign implies both that libraries transform the lives of patrons and that libraries are transforming as organizations with new services and ideas. For this to happen, librarians must transform themselves by learning new skills and developing a mindset that encourages innovation and experimentation at their libraries. This project from CSL is well-suited to the IMLS Community Anchors grant category as it will fill this skills gap by teaching librarians from across the northeast, at all professional levels and types of libraries, practical tools for how to collaborate, how to engage with and develop a deeper understanding of their communities' needs, and how to design programs to meet those needs. As one pilot participant noted, "The EXCITE program puts the community and our patrons front and center."

CSL has identified the need for this project through conversations with other COSLINE members (Council of State Library Agencies in the Northeast), observations by CSL staff of library director searches in Connecticut, requests for leadership skills training from Connecticut librarians, observations by project staff of pilot participants and their professional growth as a result of the pilot (see video at <https://youtu.be/3IAXeopLKO4>), results of surveys from the pilot participants (<https://goo.gl/xKd6kv>), and comparisons and gap analysis of other library leadership programs.

As reported in surveys, 100% of pilot participants believe more libraries should have access to this training. Additional pilot feedback indicated that the majority of the participants felt the language, skills, and tools taught in the EXCITE program were essential to helping libraries transform and be relevant in the 21st century, that the skills learned had a positive impact on teambuilding, and that this training helped to create a stronger culture of collaboration and innovation in and between the participating libraries. Many of the librarians noted that there was little opportunity elsewhere to learn these skills in such an applied way. [See supporting documents for detailed evaluation results from pilot.]

This intensive, long-term, team program focuses on sustainable results, which are difficult to gain from more traditional short-term, individually-focused library leadership workshops led by the New England Library Association, ACRL New England Chapter, and PLA.

EXCITE elaborates on the concepts in IDEO's Design Thinking for Libraries Toolkit by bringing those tools – and more – to life and applying them to real world programs and services through active learning with live instruction and in-field coaching from an experienced trainer. This project also adds skills in developing the language and mindset for ongoing true collaboration and adds the entrepreneurship skills of how to make ideas real, motivate through storytelling, fail forward and iterate to keep programs relevant, and use business modeling tools to fully plan a successful implementation.

Project activities will expand upon the design of the ILEAD program by encouraging team building and team design. However, a crucial difference between EXCITE and ILEAD is that EXCITE teams will involve their

communities in the design of programs throughout the training period instead of bringing pre-conceived programs to their first session. Also, the ongoing EXCITE coaching is unique as it immediately helps teams apply the skills to a real-world program, service, or space and assists teams with integrating the tools into everyday practice.

Importantly, the program aligns with the work of the Aspen Institute by giving library employees the tools to activate many of the concepts in the Institute's Action Guide around people, place, and platform.

EXCITE also builds on training from the Harwood Institute by strengthening the interaction with community members in order to create empathy and a fuller understanding of underlying motivations, and then using this understanding to collaborate with the community to iteratively design services to keep them relevant. Pilot participants who had also gone through the Harwood program felt that the experiences were complementary and reinforced each other.

2. PROJECT DESIGN

EXCITE Transformation for Libraries is an immersive experiential learning opportunity in which teams of librarians will gain and practice 21st-century skills and apply them directly to real-world innovations in their own libraries. EXCITE teaches librarians how to:

- Transform themselves by adopting the language, character, and mindset of truly collaborative innovators.
- Engage their communities in exploratory conversations and activities that allow them to gain deep insight into their patrons' motivations and underlying needs.
- Collaborate with their colleagues and partners to generate new, innovative, and transformational ideas that can address those community needs.
- With their communities, iteratively co-design and refine programs, services, and spaces with the task and objective of "bringing community members together at their libraries to connect and collaborate in a meaningful and enjoyable way."
- Develop business plans that consider factors crucial to successful implementation and enact their programs at their libraries, motivating the community to attend by using storytelling techniques.

CSL led a successful full-scale pilot project from October 2016 – Summer 2017 with teams from seven libraries in which the instructor and project staff tested the project design. A video featuring interviews from almost all pilot participants is available at <https://youtu.be/3IAXeopLKQ4>, and survey information is at <https://goo.gl/xKd6ky>. As a result of this input, the project staff have modified the design for greater success by identifying an ideal team size and number of libraries, emphasizing the importance of including the library director in the team, reconfiguring the timing and length of the in-person sessions and fieldwork, adjusting the curriculum and specific learning activities, and enhancing the coaching aspect of the project. Building on this proof of concept, funded through Connecticut's LSTA allotment, CSL now wants to extend the training opportunity to a broader and more diverse range of library teams.

Goals, Objectives, Outcomes:

Goal 1: Improve northeastern librarians' skills in 21st-century leadership, true collaboration, innovation, community engagement and understanding, and project management.

Goal 2: Enable teams to activate a space, program, or service for community members to come together at the library to collaborate in a meaningful and enjoyable way.

Objective 1: Offer a training program in which librarians learn how to innovate and collaborate as teams working on a new program or service to address a community need.

Objective 2: Provide funding to and support for participating teams to enact the new program or service at their library or in their community.

Outcome 1: 100% of participants will indicate an increase in skills and indicate confidence that they will apply what they learned.

Outcome 2: Organizational culture at 90% of participating libraries will change, as shown through cross-department collaboration and the use of newly learned techniques in everyday settings.

Outcome 3: 100% of new programs and services will improve partnerships, patron participation, and patron benefits.

Success Statements: For Core Program cohorts, the majority of teams will complete the training and apply what they have learned to implement a new program, service, or space that brings the community to the library to collaborate in a meaningful and enjoyable way. For Standalone Bootcamps, coworkers of previous participants will understand and employ the same language, tools, and techniques, and will report broader organizational impact and change. For Facilitator Certification, participants will complete the training and be able to confidently facilitate their colleagues and their stakeholders, partners, and community members through a session to generate ideas and develop those ideas into concepts. All participants will integrate Everyday Innovation techniques into their workflows.

Project Activities:

CSL will offer multiple progressive, in-person training and coaching sessions involving as many as 96 participants from up to 18 public, academic, and special libraries. The techniques and skills that are taught will be applicable to all of these types of libraries. The teams' focus will be on their individual community needs, in whichever way they choose to define "community."

CSL will contract the training to Jeanine Esposito from Innovation Builders (IB), an organization with experience guiding companies such as PepsiCo and United Health to innovate new products and services and transform ways of doing business. Because of her thorough knowledge of the subject and her teaching experience, Ms. Esposito can adapt the training activities each day to accommodate the information needs of the teams. If certain practice activities take longer than scheduled, as participants take the time they need in order to learn the skills fully, then Ms. Esposito can revise her timeline for the rest of the training session. Her responsiveness to the participants' needs was well-proven in the pilot. In addition, project staff will reassess the schedule and curriculum midway through the project to incorporate changes suggested by participants.

There are three components of the EXCITE Transformation for Libraries project:

- I. **The EXCITE Core Program** is the heart of the project and is modeled on the initial full-scale pilot. The Core Program will be offered twice, with each cohort consisting of four-person teams from six libraries, for a total of 48 participants and 12 libraries over the two cohorts. IB expanded the timeline of the Core Program based on advice from pilot participants so that each cohort spans a full year, with ample time for training, design, and development of community programs as well as implementation and refinement of the programs. Cohort 1 will run from January-November 2018 with reports due on December 28, 2018, and Cohort 2 from September 2018-August 2019 with reports due on September 6, 2019.
- II. **Standalone EXCITE Bootcamps:** The three-day Bootcamp, a repeat of the Core Program's Bootcamp, will be offered twice (July 2018 and April 2019) for a total of 48 participants from libraries that have already sent teams to the pilot project or Core Program (a total of 18 libraries). IB developed this additional component based on requests from pilot participants. Bootcamps will expand the nucleus of staff in each library that have a basic understanding of the EXCITE tools, helping to reinforce the impact on the libraries' culture of collaboration and innovation.
- III. **EXCITE Facilitator Certification:** IB will offer one cohort (June-December 2018) of this intensive certification for between 6 and 8 participants who have already completed the Core Program. This will create a team of innovation facilitators within the northeast library community and help sustain the project's benefits and impact.

[See supporting documents for specific training dates, detailed training curriculum, and digital badge criteria.]

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Core Program Cohort 1 and Standalone Bootcamp 1 will be held at CSL's facility in Middletown, CT, with ample meeting space and support services. Based on strong interest from Rhode Island libraries and the RI Office of Library and Information Services, CSL will explore locations in RI for hosting Cohort 2 and possibly also Standalone Bootcamp 2. The CT facility can be reached more easily by teams from the western part of the region, and a location in RI will be more convenient for potential teams from eastern New England.

I. The EXCITE Core Program has three units: Learn and Apply (Bootcamp), Design and Transform, and Program Implementation. Each unit will consist of a three-day in-person training session, with two months of fieldwork in between units and six months afterward for implementation.

Unit 1. Learn and Apply: Bootcamp

Following a progressive learning approach, teams will first learn and apply the foundational language, behavior, tools, and process for transformation. One pilot participant noted, "The idea that collaboration is a skill and a tool and something that can be learned is really a powerful idea." Using a non-library Case Study, IB will teach participants how and when to collaborate as a team, how to facilitate and engage the community through human-centered research for deeper insight, how to use design-thinking tools to design transformative programs and services in response to community needs, and how to make those programs and services real. Teams must develop insights, ideas, designs, prototypes, and final solutions. Throughout the program, teams will provide feedback to other participants to refine their programs, and all teams will make a final presentation to the group. After the Case Study, participants will work across library teams to use the tools they have learned to address an area of real-world "Everyday Innovation" in their libraries, again making presentations to the larger group. On the third day, IB will assign the teams this task for their real-world program, service, or space: "Activate a space/program/ service for community members to come together at the library to collaborate in a meaningful and enjoyable way." Teams will then prepare for their first fieldwork session.

Badges & Certifications: IB and CSL will award participants with a Collaborative Innovator Digital Badge issued through Credly's digital credentialing platform, which is also used by ALA's Center for the Future of Libraries (<http://www.ala.org/transforminglibraries/future/digitalbadges>).

Fieldwork 1

In the two months between Bootcamp and the Design and Transform unit, teams will return to their home libraries to conduct exploratory conversations with 24-32 community members and with 20+ potential community partners, stakeholders, and staff to uncover emotional and functional needs and motivations associated with the assigned task. IB will provide scripts, discussion guides, and role playing examples to support the fieldwork, as well as coaching calls and virtual site visits via Skype or Facetime to help teams develop their ideas into practicable projects. Also as part of their homework, participants will blog about their work and reflect on their experiences.

Unit 2. Design and Transform: Insights, Ideation and Iterative Design

IB will facilitate the participants through a synthesis of their insights from the field and the development of core motivations and drivers. These will be used to drive an immersive ideation session from which teams will choose the theme for their program concept. Teams must then fully develop their concept combining the design-thinking tools of iterative design with feedback from other teams and fail forward techniques, ending with a final presentation of their program that clearly expresses value and integrates storytelling. One pilot participant said of this process: "We would get to this point where we were really proud of what we had done, and then the next day we came back, and we kind of had to tear it all down. But then we got to put it back together, and it was even stronger."

Fieldwork 2

In the two months between the Design and Transform unit and Program Implementation, teams will once again conduct conversations with 32-50 community members and with potential community partners, stakeholders and staff, with the intent of getting responses to refine the program into something that is desired, needed, and relevant to the community. Teams will also refine their Business Model Canvas and begin to outline their implementation plans and gain internal support for their programs. IB will provide tools, discussion guides, and role playing examples to support the fieldwork and will also conduct coaching calls with the group. As in the first Fieldwork period, participants will continue to blog about their work.

Unit 3. Design and Transform: Make It Real (Program Implementation)

In the concluding unit of training, teams will finalize their program details and implementation plans through feedback from IB and other participants and will end by pitching their projects to a funding panel. In a short "pitch deck" of presentation slides, teams will develop a cohesive story that illustrates the value of their program and includes a description of the identified community need, the team's plan to address the need, a summary of their insights from community, partners and stakeholders, support they have internally and from partners, a timeline of project activities, and a project budget. As with the pilot, the panel of judges will feature entrepreneurs, marketing experts, and librarians. The panel will score the presentations, offer guidance to the teams, and award seed grants of up to \$3,000 to be spent on program supplies, contractors, staff, and other project expenses. [See supporting documents for a pilot pitch presentation and letters of support from judges.]

Full Implementation: 6 months

After completing their in-person training sessions and receiving their seed funding, each team will have six months to enact their new program/service and a month to report on it. By applying their new skills to a practical task at a local level, participants will cement their knowledge and begin to transform their libraries to meet a community need. Executing their programs will also require them to practice project management skills, including planning, financial reporting, timeline adherence, communication, and people management. During this period, IB will continue to provide coaching calls, progress check-ins, and on-site mentoring as teams carry out the programs they developed, ensuring greater chances of success. As part of the calls, teams will discuss options for fail forward – identifying why an initiative was unsuccessful and adapting their programs in response. One participant said of the fail forward process: "We're used to doing our programs, and if they don't work after a couple months, we'll just kind of abandon it. We'll just try something else, and we leave it, instead of giving ourselves permission to take what works from the program and what doesn't work."

IB's site visits will focus on the library's use of Everyday Innovations, reinforcing the integration of these skills and techniques into the library's everyday practices. During a final conference call near the end of their projects, the teams will share their results with the rest of the cohort and receive additional guidance on completing their reports. The Core Program mentoring sessions are more numerous and robust as a result of requests from pilot participants. They also provide a means of accountability to keep teams on schedule. In their final report forms, teams will document their expenditures of grant funds and provide details about project activities and outputs/outcomes. [See supporting documents for sample report forms.]

Badges & Certifications: Once the projects are launched, IB and CSL will award participants with an Innovation Designer Certification and Digital Badge.

II. Standalone EXCITE Bootcamps

In order to sustain program benefits and ensure organizational culture change, IB will repeat the three-day Bootcamp training (detailed in the Core Program above) for individual employees from libraries that have already sent teams to the pilot project or Core Program. This addition to the program was requested by 80% of pilot participants. Library directors can choose to send as many employees as they wish, and project staff will make accommodations to ensure that all eligible libraries have an opportunity to participate. The Bootcamp will be offered twice, in July 2018 and April 2019, for a maximum of 24 library employees per session. In total, the additional Bootcamps will accommodate 48 participants over the two sessions. This component will help to expand the impact of the training, strengthen an organizational culture of collaboration and innovation, and increase the probability of sustainable change at participating libraries.

Badges & Certifications: As with the Core Program, Bootcamp participants will also earn a Collaborative Innovator Digital Badge.

III. EXCITE Facilitator Certification

CSL will help to further sustain ongoing project activities by recruiting between 6 and 8 experienced participants who completed either the pilot or the first Core Program cohort for IB's advanced Facilitator Certification. In this intensive program, they will learn to facilitate a fueled ideation cycle within libraries in order to create additional transformative programs. Facilitator training will kick off with four days in June 2018, followed by additional training days throughout the next seven months. Participants will gain experience by working closely with IB and helping to co-facilitate selected Core Program sessions for Cohort 2 as well as the first standalone Bootcamp. As a final test in order to earn their certification, facilitators will independently conduct ideation sessions with volunteer "client" organizations – either their own libraries or another library – with the understanding that the resulting ideas will be used in a real-world context. This training will create a pool of librarians who can replicate these ideation practices elsewhere. 75% of pilot participants were interested in this next step. [See supporting documents for detailed training curriculum, digital badge criteria, and specific training dates.]

Badges & Certifications: Upon successful completion, participants will earn an Innovation Facilitator Digital Badge.

Evaluation:

A continuous evaluation of the project will be led by evaluator Joshua Elliott from TechInPedagogy, who will conduct surveys, observations, and interviews of each cohort and training group. He will also analyze comments from the funding panel and confirm that participants have met the criteria for earning digital badges and certifications. Assessment of Core Program participants will occur at the conclusion of each training session and at the conclusion of the implementation period. Assessment of Bootcamp participants will occur at the end of the training. Assessment of Facilitator trainees will occur at the conclusion of their first training session, at the end of their co-facilitation period, and at the end of the certification process. As with the pilot, feedback from early cohorts will be integrated into the project design for later participants. Project staff will discuss potential changes and refinements during Summer 2018. [See supporting documents for Evaluation Plan and samples.]

In terms of performance measurements, Mr. Elliott will assess participants' adoption of the characteristics of a Collaborative Innovator, participants' gains in the 21st century skills taught in the program, the impact of the training on library programs and services, and the impact of the training on library culture. For Facilitator trainees, he will assess their confidence in facilitating ideation sessions, their ability to manage diverse groups and draw out the best input, and their effect on improving the ideation process. He will also report on the specific Performance Measures required by IMLS, as described below in Section 4. National Impact.

Recruitment, Application, and Selection:

Starting in Fall 2017 and continuing through June 2018, CSL will recruit library teams in northeast states (New England, NY, NJ, MD, DE, PA) through the following methods:

- Presentations and information sessions at library association conferences – CLA (May 2017), RILA (May 2017), NELA (October 2017)
- 2017 COSLINE Futures conference (September 2017)
- Requests to SLAAs and their Library Development departments to spread the word among their library contacts and conferences
- Posts to state and national library association email lists
- CSL social media and press releases
- EXCITE Transformation for Libraries web page (<https://goo.gl/aMfsZS>)
- Project staff members' and pilot participants' personal network contacts

For the Core Program, teams from all types of libraries (urban and rural public, academic, and special) with participants at all career levels may apply through a competitive process. Participants are not required to have an MLS degree. Based on reports from pilot libraries, teams will have a better chance of achieving long-term organizational change at their home libraries if the library director is part of the team. Likewise, the team should include other influencers and decision-makers from within the organization. Although recruitment efforts will be targeted on northeast states, teams from outside the region may apply, as long as they can commit to attending all training sessions. A needs assessment of school librarians in Connecticut showed that the training would be logistically difficult to offer for this group and even harder in an extended geographic region.

For the Bootcamps, recruitment efforts will focus on prior Core Program and pilot libraries, with the goal of having participants from as many of the libraries as possible.

CSL will request informal video applications of less than five minutes from Core Program teams and Bootcamp individuals. Applicants should each state their name, title, current work responsibilities, why they want to participate, and what they hope to do as a result of the training. Team members must all sign an agreement committing to attendance on all the training dates and to conducting fieldwork and additional homework in between training sessions. [See supporting documents for recruitment and application materials.]

	Applications Due	Notification Date	Training Dates
Core Program Cohort 1	11/1/2017	11/15/2017	Jan.-Nov. 2018
Core Program Cohort 2	6/14/2018	6/28/2018	Sept. 2018-Aug. 2019
Standalone Bootcamp 1	5/3/2018	5/17/2018	July 2018
Standalone Bootcamp 2	1/17/2019	1/31/2019	April 2019

CSL will select participants based on the following criteria:

- Commitment to attending all training dates and conducting field work
- Responses that align with the curriculum and program
- Personalities exhibited in applications – looking for energy and interest in collaboration
- Geographic distribution
- Diverse types of libraries, librarians, and communities
- Individual applicants for the Standalone Bootcamps must work at a library that has already participated in the pilot or in the full Core Program.

CSL will not set a predefined number of libraries to be accepted from specific states or a predetermined breakdown of public/academic/special libraries in each cohort. The training is flexible enough to accommodate

teams from different types of libraries within the same cohort, as the emphasis of the process is on the local community's need, not the participants' needs.

Individual applicants for the Facilitator Certification must have completed the Core Program, be interested in continuing, and be available to attend all training sessions. IB will have strong input in the selection process, based on applicants' engagement with the Core Program and their learning progress throughout the program. Additional selection factors will include geographic distribution and support from candidates' library directors to conduct facilitations for other organizations.

Dissemination:

CSL expects teams to seek out and learn from library initiatives similar to theirs and likewise to share their design and results with the profession and with their local communities. The following communications and dissemination methods will provide opportunities for participants to reflect on and share their learning:

- Individual library or participant blogs and social media
- Newspaper articles via press releases from CSL and library teams
- Team presentations about their new programs and methodology at their state and regional library association conferences and COSLINE
- Professional journal articles and library association newsletter articles
- CSL social media
- Webinars:
 - IB's Everyday Innovations (or "Innovative Meetings in 10 Steps")
 - Core Program participants talking about their experiences and programs and giving tips

As a culminating event to share the results of the project with a broader library audience, facilitators will conduct a fueled ideation session for attendees at the New England Library Association conference, October 2019, location TBA.

IB will share training templates online but the EXCITE program simply cannot be translated into writing. In this project, learning comes to life through hands-on practice and guidance from a trained instructor. The expertise gained by actually doing the tasks and completing a new program in collaboration with coworkers is crucial to the learning process. It is an experience that cannot be replicated through a written toolkit.

Resources:

All of these training opportunities (Core Program, Bootcamps, and Facilitator Certification) are tuition-free, with just minor fees to cover meals. Participants in the Core Program will pay \$100 each (\$400 per team) for lunches during the training sessions; Bootcamp participants will pay \$30 each; and Facilitator participants will pay \$130 each. Participants are responsible for their own travel and lodging as well as additional meals.

In order to take part, participants will need significant resources from their home libraries, including administrative support, approved time away from work, and possible financial support. To help overcome this hurdle, CSL will offer non-competitive scholarships of up to \$2000 per team and \$1000 per facilitator trainee to offset costs for travel, lodging, and staff coverage while teams are away. Libraries can submit their receipts for reimbursement up to this total amount.

This project design assumes that library staff will be interested in participating in this kind of experiential learning opportunity and that the staff and directors will be able to dedicate the time and funding necessary to complete the training and implement a new program or service at their libraries. The project staff have included design elements to avoid potential logistical risks around recruiting, retention, and scheduling. Smaller libraries will be invited to include significant board members, volunteers, or friends of the library to fill out their teams of four. The program has been bolstered with additional coaching to ensure that real-world programs will be

successfully launched and refined going forward. Scheduling of in-person sessions is designed to minimize the impact of weather, using mid-week dates that can be shifted as needed. Scholarships for travel and staffing costs will help teams make a commitment to attendance, and seed grants will help libraries enact their new programs and services. At the Rhode Island Library Association Conference in May 2017, directors from approximately 10-12 libraries expressed a desire to send teams, indicating that there is already sufficient interest in the region to support two full cohorts.

Project Staff:

Dawn La Valle, Director, CSL Division of Library Development, will serve as project director with assistance from Gail Hurley and Maria Bernier, Library Development Consultants at CSL. All three have experience in managing multi-year projects funded by federal agencies and private foundations as well as managing the successful pilot project. Ms. La Valle will be responsible for the overall administration including fiscal, procurement, contract oversight, and reporting, and will liaise with library agencies and associations in other states. Ms. Hurley and Ms. Bernier will assist IB with all training activities, track matching costs from participants, instruct participants in management and reporting of their seed grants, and issue project communications. The entire team will work on recruitment and selection of participants as well as dissemination of project results.

Instructor Jeanine Esposito of Innovation Builders partnered with The Westport Library on several aspects of the 2013 IMLS grant "Makerspace 2.0: Retinkering Libraries." She led the successful pilot of EXCITE Transformation for Libraries with CSL will lead all the training and coaching sessions throughout this project. Ms. Esposito and IB are uniquely qualified to translate their corporate experience to the library field.

Evaluator Joshua Elliott of TechInPedagogy is an Assistant Professor of Practice and Director of Educational Technology at Fairfield University in Connecticut. He has experience in student assessment as well as instructional design for both universities and secondary schools. He will compile and analyze data from surveys and the funding panel's scoring sheets, and he will observe and interview participants throughout the program.

3. DIVERSITY PLAN

In the context of this project, "communities" are both the participating library employees (the direct audience for the project) and their service communities (indirect audience), whether those are public library patrons or college students. Through the recruitment and selection process, project staff will include diverse types of libraries (public, academic, special) that represent diverse geographic and patron communities (urban, suburban, rural; local residents, students, researchers; possible racial and ethnic diversity among the patrons). There may be racial, ethnic, gender, and age diversity among the participants as well, and while this is desirable and can be enhanced through the selection process, it is not predictable. Also, participants can be from any department, any professional level (MLS not required), and any length of experience. Through these various means, the project staff will work toward serving diverse audiences.

Experiential learning programs such as this accommodate different types of learning styles and are strengthened through the diverse experiences and worldviews of participants. This is active, hands-on professional development that encourages learning by doing rather than by reading and writing.

The new programs and services developed through the program will be in direct response to the needs and motivations of the libraries' communities. Core Program teams will collect community input twice in the training program: once to gather ideas and later to get reactions to the proposed new program. They will continue to engage their communities as they work through iterations of the program plan.

4. NATIONAL IMPACT

With reference to the Performance Measures required by IMLS, evaluator Joshua Elliott will collect survey data from participants throughout their training sessions. CSL will report the resulting data to IMLS, add it to the

EXCITE project website, and include it in dissemination materials from CSL such as press releases, articles, and social media.

Outcomes are expected to be similar to the pilot, in which 100% of participants agreed/strongly agreed that they learned something by participating in the project, they were likely to apply what they learned, and applying what they learned would help improve their libraries' services to the public. The targets for this project are for 100% of participants to agree or strongly agree with each of the following Performance Measures from IMLS:

1. My understanding has increased as a result of this program/training.
2. My interest in this subject has increased as a result of this program/training.
3. I am confident I can apply what I learned in this program/training.

The benefits of this program will be sustained in several ways, as illustrated by statements from pilot participants (<https://goo.gl/xKd6kv>). First, EXCITE is designed to cultivate the next generation of library leaders. Individual participants will continue to apply their new skills and techniques at their home libraries and will carry those skills to future roles and new libraries with promotions and career advancement, further propagating the effects of the training program. Second, team members will bolster each other in the continued use of skills and techniques at their libraries, with support from additional coworkers who attend the Bootcamps. Third, benefits will be sustained over the long term through organizational change at participating libraries. When a library director and multiple library employees have been through the Core Program or Bootcamps, they will have the collective ability to reshape their library's organizational culture with positive results. They will continue to employ their new skills and techniques and integrate them into planning efforts and meetings until design thinking becomes embedded in the organization. One pilot participant, a library director, said of her team's experience: "Our staff learned so much from it, and they felt that they had grown, bonded with their coworkers, learned skills that help them in their job, that help them as future library leaders."

Participants in the Facilitator Certification provide long-term value in sustaining the benefits of the program, as they utilize their skills to facilitate ideation sessions for other libraries and community nonprofits. This training has application to many areas of library planning, staff development, and community needs assessment.

All participants will take their skills back to their home states, spreading the program benefits over a dispersed geographic area. As their careers progress over time, they will spread these skills even more widely.

Because the training program develops teams of coworkers, there is a greater chance that the team's work will lead to successful and sustainable change in each participating library. The team gives each library a nucleus from which to build a culture of collaboration and innovation as they use their new techniques and skills in everyday settings. One pilot participant said, "I've gone to a lot of workshops, and I've taken a lot of webinars, and you learn little bits of information, and it's cool and you get excited about it, but when you come back to your library, you kind of forget about it. But with EXCITE, you're accountable to all the members of your group, you're accountable to everyone in your library, to all the other librarians from other libraries. So this extra accountability really forces you to actually implement everything that you've learned."

EXCITE will also indirectly benefit multiple patron communities throughout the northeast through newly-realized programs or services. However, these programs and services will not necessarily be immediately translatable to other institutions, as they will have been developed in direct response to specific needs and interests in the teams' local communities.

IB's training curriculum can be revised midstream because of the instructor's ability to recognize when change is needed and adjust accordingly. The curriculum has already been adapted from the realm of commercial product development in order to work within the library field. The training course content will remain the intellectual property of Innovation Builders under their copyright. IB will share copyrighted templates and suggestions for Everyday Innovations on CSL's website.

Schedule of Completion

	Grant Year 1											
	Oct-17	Nov-17	Dec-17	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18
Recruit and select participating teams												
Core Program: Cohort 1 training												
Cohort 1 new program/service implementation												
Core Program: Cohort 2 training												
Facilitator training												
Bootcamp 1												
Evaluation / Performance measures												
Presentations at library conferences												

	Grant Year 2												
	Oct-18	Nov-18	Dec-18	Jan-19	Feb-19	Mar-19	Apr-19	May-19	Jun-19	Jul-19	Aug-19	Sep-19	
Cohort 1 new program/service implementation													
Cohort 1 reporting													
Core Program: Cohort 2 training													
Cohort 2 new program/service implementation													
Cohort 2 reporting													
Facilitator training													
Bootcamp 2													
Evaluation / Performance measures													
Presentations at library conferences													

DIGITAL PRODUCT FORM

Introduction

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

Instructions

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

PART I: Intellectual Property Rights and Permissions

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

The training course will remain the intellectual property of Innovation Builders (IB) under their copyright. IB will share copyrighted templates and suggestions for Everyday Innovations on the CT State Library's (CSL) Website. Any materials produced by CSL staff will be freely accessible through the CSL Website.

CSL's intellectual property policy is found at: <https://ctstatelibrary.org/about/policies/intellectual-property-policy-2/>

CSL disclaimers and permissions are found at: <https://ctstatelibrary.org/about/policies/disclaimers-and-permissions/>

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.

All project products will be freely accessible with use limited by IB copyright terms. Information indicating copyright status will be included with the copyrighted products in question on CSL's Website.

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

We do not believe any content created will raise any concerns.

CSL's privacy policy is found at: <https://ctstatelibrary.org/about/policies/website-privacy-policy/>

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

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

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

The EXCITE Transformation for Libraries Website will be in the format of a Libguide. CSL has a subscription
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to Springshare's Libguide content management software. Springshare is a cloud software vendor. The EXCITE Libguide address is: <http://libguides.ctstatelibrary.org/dld/EXCITE>. It currently contains information from our full-blown pilot project as well as links to related projects.

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

Staff computers, Springshare Libguide software and maintenance of the Website are supplied by CSL.

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

Digital file formats that are used for this project include .pdf, .doc or .docx, .ppt or .pptx, and .jpg. Video created by IB use YouTube format with the Standard YouTube license.

The Libguide uses HTML coding.

CSL will follow the appropriate standards and use the best resolution available for the images posted on the site.

B. Workflow and Asset Maintenance/Preservation

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

CSL and IB project staff will maintain a shared drop-box area as in the EXCITE pilot phase to house working drafts of documents and other materials.

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

Project documents and related materials created by CSL staff will be maintained on a CSL network server.

C. Metadata

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

N/A

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

N/A

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).

N/A

D. Access and Use

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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).

All items created by CSL staff will be openly available online on the CSL Website with use of standard browsers.

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

EXCITE Transformation of Libraries Libguide at <http://libguides.ctstatelibrary.org/dld/EXCITE>
Connecticut State Library Website at <https://ctstatelibrary.org/>

Part III. Projects Developing Software

A. General Information

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

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

B. Technical Information

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

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

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

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

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

C. Access and Use

C.1 We expect applicants seeking federal funds for software to develop and release these products under open-source

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

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

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

Name of publicly accessible source code repository:

URL:

Part IV: Projects Creating Datasets

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

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

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

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

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

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

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

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

Name of repository:

URL:

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