Preservation of Electronic Government Information National Forums Project

IMLS NLG Proposal

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ABSTRACT

The University of North Texas (lead applicant), in collaboration with the University of North Carolina at Greensboro, the University of California at Santa Barbara, the University of Missouri, the University of Pennsylvania, Stanford University, Yale University, the Center for Research Libraries (CRL), the Educopia Institute, and the Scholarly Publishing and Academic Resources Coalition (SPARC) propose a one year project to hold national forums in 2018 to address national concerns regarding the preservation of electronic government information (PEGI) by cultural memory organizations for long term access by the citizens of the United States. The PEGI National Forums project proposal has been informed by apprehensions highlighted in a series of meetings from 2016-2017 between university librarians, information professionals, and representatives of federal agencies, including the Government Publishing Office (GPO) and the National Archives and Records Administration (NARA).

By convening the proposed series of qualified groups of experts and key stakeholders (including those from fields adjacent to that of librarians, such as subject domain researchers) we will identify and surface a broadly shared national consensus and agenda on specific future steps needed to preserve and provide long term access to electronic government information in the United States. Forum activities will include facilitated discussions that will document the relevant knowledge, skills, attitudes, and behavior needed to advance this agenda, and engage disparate stakeholders in planning for aligned activities in the future. Beyond the forums held, a key project outcome will be a published report articulating the shared national consensus and agenda on these issues.

This project will take the form of a one year National Forum Grant in the IMLS category of curating collections. The amount of IMLS funds requested for this project is $87,000. This project will take place during a twelve-month period from 12/1/17 to 11/30/18. The project will include collaborating participants from the named partner institutions serving as members of a steering committee, as well as project staff hired specifically for the period of project activity, to serve in the roles of facilitators and analysts. The project partners putting forward this proposal include experts from several university libraries and nonprofit organizations, all of which are deeply concerned about and committed to ensuring the long term preservation and access to electronic government information of a critically important and lasting historical value to the citizens of the United States. The University of North Texas, the project lead applicant, has for years sought to preserve at-risk electronic government information, and regularly participates in the national EOT web archiving effort.

Outcomes

The PEGI National Forums project will result in the following outcomes:

- Six Mini-Forums will be held, each designed to surface knowledge, attitudes, and behavioral perspectives from the relevant stakeholder groups represented in each meeting, and to document points of shared alignment with the other stakeholder groups engaged in the course of the project. Each event will result in a brief report of findings that will be publicly disseminated.
- Two Webinar Forums will be held, designed to broadly engage distributed groups of stakeholders that cannot be physically assembled for in-person events. These will again surface and document stakeholder priorities, perspectives, and points of collaborative alignment going forward.
- A concluding PEGI National Forum will convene a strongly qualified group of experts and key stakeholders to engage with the issues involved in preservation of electronic government information as surfaced in the preparatory forums. The project Steering Committee and National Forum Attendees will write a final project report setting forth a national agenda for collaborative action.
INTRODUCTION

The University of North Texas (lead applicant), in collaboration with the University of North Carolina at Greensboro, the University of California at Santa Barbara, the University of Missouri, the University of Pennsylvania, Stanford University, Yale University, the Center for Research Libraries (CRL), the Educopia Institute, and the Scholarly Publishing and Academic Resources Coalition (SPARC) propose a one year project to hold national forums in 2018 to address national concerns regarding the preservation of electronic government information (PEGI) by cultural memory organizations for long term access by the citizens of the United States. The PEGI National Forums project proposal has been informed by apprehensions highlighted in a series of meetings from 2016-2017 between university librarians, information professionals, and representatives of federal agencies, including the Government Publishing Office (GPO) and the National Archives and Records Administration (NARA).

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STATEMENT OF NATIONAL NEED

There is a growing awareness nationally of the need to mitigate the risks of serious and ongoing loss of government information that is electronic in nature. This issue has loomed larger in recent years, reaching a point of criticality that has driven intense discussions by information management thought leaders from many sectors across the United States, as well as the general public.

This project proposal builds on a broad range of preparatory activities undertaken by the project participants to assess national needs in this area as well as opportunities for improving the current situation. This range of activities and preparatory projects have comprised what the participants term the PEGI Initiative, a loosely coupled effort that has been building to this grant application. The following is a brief recap of the PEGI Initiative to date, how it has connected with other synergistic efforts, and how these activities have informed this application.

Beginning in 2015, the project co-PIs (Sittel and Halbert) began noting the many ways that long-term preservation of electronic government information could be improved through broader discussion between community members. Many activities to preserve electronic government information benefit from multi-
institutional collaboration. An example is the End of Term (EOT) Web Archive efforts, which are undertaken by coordinating work between several large institutions with a particular interest in preserving government web pages. Informal conversations with government information specialists at other institutions demonstrated that there was a shared sense of anxiety and urgency in the community concerning persistent access to electronic forms of government information. Consequently, two meetings were held in April and December of 2016, seeking to better understand and explore ways of addressing what was increasingly being articulated among members of the community as urgently needed cross-sector activities to preserve and provide access to electronic government information. These two meetings further built on extensive prior discussions of these issues that had been conducted at CRL’s 2014 Global Resources Collections Forum, which ultimately resulted in the Leviathan Report summarizing serious threats to the long-term integrity and accessibility of electronic government information. This proposal will not attempt to recapitulate the details of these various prior studies, which we feel extensively document the national need for preservation of electronic government information. But the core problem discussed in these reports and addressed in this project can be summarized as follows:

The relatively well-understood workflow of the pre-digital era of government information production, dissemination, and preservation has been disrupted in fundamental ways by the rapidly changing landscape of digital information. Previously, federal agencies created content and when that content was ready to be disseminated or archived, appropriate print material was sent to NARA, GPO, and the institutions that make up the Federal Depository Library Program (FDLP). The workflows of these three entities were effective in the print era. However, today, most government information is produced and disseminated digitally. Digital workflows are neither as predictable nor systematic as print workflows; further, the amount of digital information has exploded. Also, there are now grave concerns that federal agencies may be either defunded or discouraged from taking effective steps for long term preservation and access to the information they produce. While NARA, GPO, and FDLP institutions continue to perform their received functions, their limitations in funding, mandates, and historical origins and orientation to print (rather than digital) information workflows all contribute to constraining their abilities to respond to the current scale of demand for preservation and access services for electronic government information. There is an urgent need to hold national forums that will bring together the three historical partners (NARA, GPO, and FDLP) with many additional new stakeholders to develop a shared consensus that can better address these issues.

**Scope of Electronic Government Information and Threats**

The PEGI Initiative has embraced a broad, inclusive, and evolving understanding of what constitutes electronic government information. Throughout PEGI discussions (as well as this proposal) the adjectives “digital” and “electronic” have been applied interchangeably to government information in an attempt to expand our thinking about what is at stake. The following is a brief discussion concerning PEGI scope.

There are many descriptions and interpretations of what can potentially constitute government information, whether print or digital in form. We believe that the most authoritative (and most inclusive) statements come from the 2016 revision of OMB Circular A-130 (in turn cited by GPO policy) which provides the following basic definitions:

- ‘Information’ means any communication or representation of knowledge such as facts, data, or opinions in any medium or form, including textual, numerical, graphic, cartographic, narrative, electronic, or audiovisual forms.
- ‘Federal information’ means information created, collected, processed, maintained, disseminated, disclosed, or disposed of by or for the Federal Government, in any medium or form.
- ‘Information dissemination product’ means any recorded information, regardless of physical form or characteristics, disseminated by an agency, or contractor thereof, to the public.
We are focusing in this project on federal (government) information that is electronic in form, rather than print, because of the findings from the many preparatory project activities described above. Having said this, electronic government information obviously includes an enormous and relatively amorphous mass of content. Identifying the range of stakeholder perspectives on this vast and loosely associated body of information, as well as the range of threats that it is vulnerable to, is a challenging task that will be addressed in the course of this project. While there is now a robust literature on general threats to successful preservation of digital content, there are many contexts and threats that are particular to electronic government information. During the project forums we intend to query various stakeholder groups about their perceptions of priorities and the relevant categories whereby they conceptualize electronic government information, and associated issues of preservation and access. For example, one categorical lens through which several federal agencies understand electronic government information is that of legislative categories: the Federal Records Act of 1950 and Presidential Records Act of 1978 each establish distinct legal contexts, mandates, and expectations for managing different types of electronic government information. These and other laws also determine responsibilities, obligations, and ultimately funding for different entities regarding such information. Different forms of media through which electronic information is transmitted or recorded is another type of categorical lens through which information can be sorted and (because of vulnerabilities associated with persistence of different media types) prioritized in terms of preservation.

While our preparatory meetings and reports have identified some of the threats to long term preservation and access to electronic government information, we have not identified all such threats. The project final report will include a discussion of relevant categories and taxonomies by which the vast range of electronic government information, as well as threats and opportunities for preservation and access, can be understood.

Stakeholder Groups

National needs regarding electronic government information may best be understood in terms of differentiated needs associated with various stakeholders. The preparatory activities and meetings undertaken by members of the PEGI Initiative have established a basic and over-arching need for this National Forum project, we intend to more specifically and analytically engage with stakeholder groups as follows.

We will engage with various stakeholders through PEGI Mini-Forums (see section on Project Design below) held in conjunction with relevant professional meetings. These Mini-Forums will each represent both a mechanism for gathering information from the relevant stakeholder group directly, as well as an opportunity to recruit individuals to attend the primary PEGI National Forum as experts representing the perspective of their stakeholder group. While all citizens of the United States are ultimately stakeholders in the electronic information provided by their government, the PEGI National Forums project will seek to engage several targeted categories of stakeholders, especially in fields adjacent to (and sometimes overlapping with) librarianship, as follows:

- **Disciplinary Researchers:** Scholars that use government information in their research efforts are of particular interest to us. There are too many particular disciplines to connect with all of them in this limited project, so we have chosen one particular discipline to focus on (History) and several cross-sectional groups of scientists, including: the American Association for the Advancement of Science (AAAS), the Committee on Data for Science and Technology (CODATA), and the International Council for Science World Data System (ICSU WDS) alliance. Each of these groups hold annual professional meetings at which we will host PEGI Mini-Forums.

- **Archivists:** While archives and libraries are often closely affiliated, we believe that archivists have particular priorities, perspectives, and disciplinary skills that should be identified in this context. The PEGI Mini-Forum at SAA will be targeted at engaging archivists in this topic.
• **Repository and Digital Preservation Professionals:** This cross-sector stakeholder group includes a wide range of professionals that maintain various kinds of subject domain and genre focused repositories. Examples include repositories for groups such as the National Oceanic and Atmospheric Administration (NOAA), Inter-university Consortium for Political and Social Research (ICPSR), the International Virtual Observatory Alliance (IVOA), and the data professionals of administrative agencies like NARA. All of these groups and their component organizations maintain corpora of digital information created, produced, or maintained by the government or government funded programs. These groups tend to be very diverse in their orientation and backgrounds, ranging from faculty researchers to digital librarians; these professionals have uniquely strong practical observations about acquiring and maintaining electronic government information. PEGI Mini-Forums will be held at several cross-sector events in order to engage a variety of these professional perspectives.

• **Public Scholars and Citizens:** Government information is utilized in countless ways by private citizens. The enormously varying interests of citizens in preserving electronic government information has been evident for institutions that have hosted DataRescue events, which have noted the wide variety in backgrounds of private citizens that show up in demonstrably direct support of the need to preserve electronic government information. Because concerned citizens are diffuse and widely distributed, PEGI Webinar Forums will be held to engage this category of stakeholders.

• **Federal Agency Professionals:** Another overlapping stakeholder group, professionals employed in government agencies are obviously also centrally concerned with this topic and need to be engaged in the course of PEGI discussions. The PEGI Initiative has to date sought to actively and directly engage professionals from various federal agencies in consultation, advisory, and planning capacities, especially from GPO, NARA, and LC. These individuals have been circumspect in their participation to date so as to not overstep their roles as public servants. However, individuals from these and other specific federal agencies that either administer or produce electronic government information will continue to be engaged in this effort, especially in the course of any PEGI forums that are held in Washington, D.C.

• **Elected Officials and their Staff:** Elected officials of the government are another stakeholder group that is obviously important in this discussion. We do not anticipate being able to attract such officials to our forums, but we do hope to engage them through their staffers, who will be contacted.

• **Aligned Nonprofit Organizations:** There are many nonprofit organizations with missions that align them with the broad purposes of this project. We have included several representatives of such organizations on the project Steering Committee, with an expectation that they will assist in reaching out to and engaging as many similarly aligned nonprofits as possible in the Mini-Forums.

• **Librarians:** Finally, librarians are themselves a stakeholder group, although it should be noted that librarians who are strongly motivated and active in preserving electronic government information are a subset of all librarians. This subset of librarians have roots in both the FDLP community and the overlapping community of digital librarians that engage in Web archiving activities, especially the EOT crawl project. The PEGI Mini-Forum held at ALA Annual 2018 will seek to broadly engage librarians from a wider range of backgrounds in this discussion.

The preparatory meetings and reports that led to this project have identified many threats to the long-term persistence of electronic government information. We believe that further progress in addressing such threats must directly engage the wide range of stakeholders concerned with this issue.
PROJECT DESIGN

The PEGI National Forums project will collaboratively identify and articulate the shared elements of a national action agenda and plan for distributed preservation and access to government information. To this end, the PEGI project will convene a series of national planning forums to identify aligned priorities by stakeholders with relevant capabilities and an interest in preserving and ensuring access to electronic government information. This series of public forums will be held in conjunction with relevant national meetings throughout the project period to analyze, develop, vet, and ultimately set forth a plan for aligned collaborative work to implement this goal. These planning forums will be facilitated by project staff hired to collate community input, write up results of discussions, publish and disseminate report outs.

The planning forums will have several goals: 1) to broadly engage with the different stakeholder groups identified previously, 2) to examine and document strategies for better orchestration of digital collection, preservation, and access mechanisms by collaborating organizations, identifying priorities, opportunities, and barriers, 3) to identify alignment between stakeholder priorities, collaborative possibilities, and effective capabilities for cooperation on aims furthering the preservation and access of electronic government information, 4) to inform the final project report that will propose aligned national actions by cooperating institutions. Consideration of strategies for cooperative action will be informed by successful examples to date of such collaborative efforts such as the EOT Web Archive, although many other digital preservation technologies beyond web archiving will also be considered.

Framework for Collaborative Action

The conceptual framework that will be used for examining collaborative possibilities in this project is the Collective Impact model for coordination of nonprofit social organizations first documented by Kania and Kramer and now generally recognized by many philanthropic agencies as one of the most successful strategies for mobilizing disparate organizations around targeted socially beneficial efforts. The Collective Impact Framework and its application to multi-stakeholder group collaborative efforts has been extensively documented and we will utilize this framework in developing the final project report proposing aligned national actions by cooperating institutions (see section below on final project report).

Steering Committee Project Meetings

The project will be coordinated through periodic meetings of the Steering Committee members (these meetings will also be attended by project staff members). There will be a minimum of four scheduled full SC Project Meetings with all project participants, although we anticipate holding a number of additional meetings with subsets of the project participants during each month of the project. These meetings will be held via videoconference as follows, with the following specified meeting outcomes:

- **December 2017:** Project kickoff meeting, initial mini-forum and webinar scoping and design, as well as other preparations. Key outcomes of this meeting will include plans for the first quarter 2018 Mini-Forums, and SC assignments for work on the webinar forums.
- **February 2018:** Preparations for all remaining mini-forums and webinars, as well as PR, recruiting, and communication efforts in preparation for primary PEGI National Forum in October. Key outcomes of this meeting will include plans and SC assignments for conducting the remaining Mini-Forums and both Webinars.
- **July 2018:** Discussion and analysis of findings from webinars and initial project mini-forums, together with initial outlining and writing assignments for project final report.
- **November 2018:** Completion and review of all remaining editing of project report, publication of report, and preparations for project wrap-up activities.
Mini-Forums

To reach the broadest possible variety of potential collaborators and stakeholders, a progression of small public forums will be held in conjunction with several professional conferences. Each of these meetings, while national in scope, will constitute a “Mini-Forum” designed to gather information from the relevant stakeholder groups represented in the meeting, and to document points of shared alignment with the other stakeholder groups engaged in the course of the project. The project team does not envision these mini-forums as a mechanism for driving the development of an over-arching PEGI agenda among these extremely diverse groups; rather, our expectation is that there are in fact many shared points of alignment between these different stakeholder groups that can be surfaced through such mini-forums.

Because of its success in hosting the two preparatory PEGI meetings in 2016, the Educopia Institute will be responsible for managing logistics and organizing travel for the Mini-Forums. Each Mini-Forum will be facilitated on site by at least two members of the project Steering Committee, who will produce a brief report summarizing findings which will be reviewed and discussed by the entire SC, and then shared publicly in the project website. In facilitating the Mini-Forums the two SC member teams will work closely with Educopia on preparations for the meeting, including tasks such as identifying space at the conference venue, conducting preparatory PR, recruiting and confirming commitments of participants for the meeting, facilitating and conducting the mini-forum itself, and then documenting the findings. Mini-Forums will likely take the form of working lunches or dinners so as to not conflict with other conference events. All feedback from participants in Mini-Forums will be recorded anonymously. If individuals who attend the Mini-Forums choose to participate in the PEGI National Forum they will be listed as contributing authors of the final project report. A set of consistent facilitation materials to use at the Mini-Forums will be developed by the Educopia Institute in consultation with the full project Steering Committee at the December 2017 meeting. These facilitation materials will be designed to elicit feedback useful for a) understanding the particular perspectives of the relevant stakeholder groups and b) informing the different sections of the project final report.

The following is a list of the professional meetings at which we will aim to host PEGI mini-forums and a summary of the relevant stakeholder groups and rationale for reaching out to these groups for purposes of the PEGI project:

1. *American Historical Association Annual Meeting* from January 4-7, 2018 in Washington, D.C. Co-PI Halbert is already signed up to present on a conference panel in which he can discuss this project and publicly recruit additional participants in the Mini-Forum. This Mini-Forum will allow us to garner input from historians and ideally identify one or more scholars to participate in the concluding PEGI National Forum in October. Historians constitute both a core category of humanities scholars as well as a core group of stakeholders with long-term research interests in government information.

2. *American Association for the Advancement of Science (AAAS) Annual Meeting* from February 15-19, 2018 in Austin, TX. As one of the largest and most prestigious cross-sector associations of scientists, holding a Mini-Forum in conjunction with the AAAS meeting provides an opportunity to engage a variety of different types of scientific researchers. Wiggin is scheduled to present at this event and will participate in the Mini-Forum.

3. *American Library Association Annual Conference* from June 21-26, 2018 in New Orleans, LA. Several members of the SC will be attending ALA Annual, and will jointly be hosting this Mini-Forum. Librarians are obviously a key stakeholder in this discussion. We will cast a wide net for this Mini-Forum and be inclusive of different types of librarians. Laster is the incoming chair of ALA GODORT, and we may make this Mini-Forum a GODORT event.
4. **Society of American Archivists (SAA) Annual Meeting** from August 12-18, 2018 in Washington, D.C. Archivists, both traditional and digitally oriented, are a key perspective and voice to include.

5. **International Conference on Digital Preservation (iPRES)** from September 24 - 28, 2018 in Boston, MA. The community which attends the iPRES conference is a cross-sector assemblage of different stakeholders (researchers, librarians, technologists) with a particular focus on preservation. We believe that this Mini-Forum should yield useful insights concerning strategies for collaborative preservation efforts.

6. **IDW2 (joint CODATA, RDA, and WDS) Conference**, planned to be held in either September or October 2018 at the time of writing. This is a unique joint conference of several different groups concerned with data management. The Committee on Data for Science and Technology (CODATA) was established decades ago as an interdisciplinary committee of the International Council for Science in order to mobilize scientific consensus on data standards and practices. The Research Data Alliance (RDA) is an international community-driven organization that promotes open sharing of data. Finally, the World Data System (WDS) of the International Council for Science (ICSU) promotes long-term stewardship of, and universal and equitable access to, quality-assured scientific data. All of these organizations not only focus on the issue of preservation and access to scientific government-produced/funded information that is digital, but are also all international in scope. We hope that this Mini-Forum will provide at least one opportunity to garner outlooks from not only the U.S. but also other countries on the issues of the PEGI National Forums project, something we feel is important for perspective on the issue. Because this meeting may be held outside the U.S., we are seeking permission to send two of the project SC members to the conference.

**Webinar Forums**

Two webinars will be held in the course of the project to provide a means of gathering information and informing people which does not require physical travel. Our hope is to reach stakeholder groups that are more dispersed through this mechanism. Members of the project steering committee in conjunction with the project staff will conduct these two Webinar Forums. These Webinar Forums will take place in March and May of 2018. We will use either WebEx or another similar webinar tool for conducting these meetings, allowing dynamic anonymous polling of attendees on particular questions. Because these will be virtual forums, we will make every effort to broaden and maximize the range of attendees through the social media strategies described below. These strategies have been very successful in engaging public scholars and citizens in various DataRescue events, leaving us hopeful that we will realize far-reaching attendance in these events. Findings from these two Webinar Forums will also be documented in brief reports which will be reviewed and discussed by the entire SC, and shared publicly in the project website.

**PEGI National Forum**

The PEGI National Forum will convene a strongly qualified group of experts and key stakeholders to engage with the issues involved in preservation of electronic government information. The Educopia Institute will again provide overall organizational support for the Steering Committee in preparing for this event. The PEGI National Forum will be the largest event held as part of this project, a day-long meeting held in mid-October 2018 in Washington, D.C., close to the date of the 2018 Depository Library Council (DLC) meeting. Between one and two dozen individuals will be recruited to attend the PEGI National Forum from the various stakeholder communities engaged in the Mini-Forums and Webinar Forums. They will be selected on the basis of both their ability to represent the perspectives of their stakeholder groups and their willingness to actively participate in the National Forum. The PEGI National Forum Attendees will include both these stakeholder representative and the members of the project Steering Committee. In the lead-up to the National Forum, a
variety of preparatory information will be shared with the Attendees for review and commentary. The brief reports from all of the Mini-Forums and Webinar Forums will be shared. An outline of the final project report will be developed by the Steering Committee and publicly distributed after the July SC meeting to all Attendees and the wider community through the project website, together with a solicitation for early feedback. The brief reports and early feedback will inform the content of the draft project final report as it is written. Particularly engaged Attendees will be encouraged to assist in writing the draft of the project final report. The draft of the project final report will be made public through the project website and listserv announcements one month in advance of the National Forum. The structure of the draft report and its purposes are described below in the section on the final project report. In the final month before the National Forum, we will encourage as much engagement and debate by the Attendees as possible on the project listserv so that major issues with the recommendations can be surfaced early on.

The PEGI National Forum itself will be comprised of a structured progression of presentations and discussions, culminating in a session to confirm the Collective Impact next steps going forward. The Attendees who are the most articulate concerning the issues and broadly representative of their stakeholder groups will be invited to speak during the first half of the meeting, followed by discussions to resolve any remaining issues in characterizing various stakeholder groups in the final report, and to then explore interconnections and synergies between the different stakeholder groups. At least one session in the day will be devoted to a final review and signoff on the remaining work to be done on the final project report, which will be the blueprint for mobilization and coordination of PEGI efforts in the future.

Forum PR, Outreach, and Marketing

The events of the PEGI National Forums project will be promoted throughout the year of the project, especially by means of a variety of social media tools. The PEGI Initiative and the aligned projects it has worked with (such as DataRescue) have successfully used social media tools to build awareness and reach different constituencies. At the most basic level, the project will have a listserv and project websites for coordinating activities, and these tools will have some utility for outreach efforts. For more specific communications (RSVPs to events, etc.) we will of course use more traditional mechanisms like email and phone calls. However, the majority of outreach, PR, and Marketing for the PEGI National Forums project will be conducted via an integrated social media strategy integrating several subsidiary tools, including Wordpress, Reddit, Twitter, LinkedIn, Instagram, and Facebook. This strategy will be coordinated and implemented using an automated social media dissemination tool; most likely one of the following: 1) Jetpack Publicize, 2) NextScripts Social Networks, or 3) DLVR.IT. All of these are automated tools to distribute coordinated messaging to multiple social media platforms simultaneously. We will select one of these tools at or before the December 2017 SC project kickoff meeting. Our aim in deploying this distributed social media mechanism is to be able to generate interest and awareness of the project by reaching out in a consistent manner to the diverse stakeholder groups we have identified. Members of the Steering Committee will take responsibility for periodic posts using this coordinating strategy and technology. Through this concerted social media push we hope to generate a buzz and broader community awareness of the issues during the year of the PEGI National Forums project.

Steering Committee

These project Steering Committee are all experts in various aspects of electronic government information and/or digital preservation and access (C.V.’s are provided elsewhere in this submission, together with letters of commitment). The Steering Committee will include: Roberta Sittel (UNT, chair, PI), Martin Halbert (Co-PI) and Lynda Kellam (both from UNC Greensboro, Katherine Skinner (Educopia Institute), Bethany Wiggin (Pennsylvania), Heather Joseph (SPARC), Bernard Reilly and Marie Waltz (both from CRL),
James Jacobs (Stanford University), Shari Laster (UC Santa Barbara), Marie Concannon (University of Missouri), and Scott Matheson (Yale University). Members of several relevant federal agencies (GPO, NARA, and the Library of Congress) have been involved in planning efforts, and will attend steering committee meetings as time allows, but will not serve as named SC members.

Project Staff

The project staff will include a part-time graduate researcher at the University of North Texas and a modest commitment of time from Educopia Institute administrative assistants. The graduate assistant will be a Library and Information Science graduate researcher well versed in government information.

Connections with Other Aligned Projects

The PEGI Initiative has many connections with other projects that are aligned in purposes. The core issue that began prompting PEGI Initiative conversations more than a year ago has continued to be highlighted in ever more pressing ways since the 2014-2015 meetings in other discussions that many of the individuals associated with this grant proposal have participated in, notably the Libraries+ Network Meeting that was held May 8-9, 2017 in Washington, D.C.\(^\text{13}\) This meeting further articulated the need to act, and to act in a way that would broaden the discussion beyond the three historical partners to begin to identify a consensus agenda for new ways of collaboratively addressing widely shared national needs for preservation and access to digital government information.

The Steering Committee assembled for this project includes individuals who will serve as liaisons with other projects that are synergistic and aligned in aims. James Jacobs is the co-founder of both the Free Government Information (http://freegovinfo.info) and the LOCKSS-USDOCS preservation network for GPO electronic documents. Bethany Wiggin is one of the principals of the Libraries+ Network. Shari Laster is the Assistant Chair/Chair-Elect for the Government Documents Round Table of the American Library Association, and is a past chair of the Depository Library Council. Bernie Reilly is President of CRL, and oversees all CRL programs, including the TRAIL archive of U.S. government agency technical reports. Katherine Skinner is Executive Director of the Educopia Institute, including the MetaArchive Cooperative for distributed digital preservation. Heather Joseph is the executive director of the Scholarly Publishing and Academic Resources Coalition (SPARC), and regularly engages on these issues with groups at the national level.

Final Project Report

The PEGI National Forums project will produce a number of outputs in the form of brief reports associated with the smaller forums conducted in the course of the project, but the most prominent document produced will be the final project report. The final project report will summarize all findings from the different stakeholders engaged in the project, and use them to articulate an agenda for coordinated national action.

As mentioned, this national agenda will be structured according to best practices in the previously cited Collective Impact model for social sector collaboration. In the social sector, initiatives geared toward system-level transformations are increasingly turning to methodologies that cultivate multi-sector stakeholder alliances in order to create and sustain transformative change (e.g., environmental improvement, reductions in homelessness, lowering teen pregnancy rates). In these approaches, system-wide change is encouraged through the work of cross-stakeholder networks, gathered purposefully to develop a shared vision and to engage in iterative development (with regular check-ins and refinements along the way) over an arc of years to achieve that goal. The Collective Impact Framework\(^\text{14}\) is the distillation of best practices for this approach.

Using the five elements of the Collective Impact Framework, the final project report will include the following sections: a) documentation of the priorities surfaced in the project which comprise a common agenda shared by all stakeholder groups engaged in the project, b) metrics for measuring progress toward achieving this common agenda, c) a plan of collaborative action for stakeholders that will advance the common agenda and
produce mutually reinforcing activities, d) mechanisms for open and continuous communication between the stakeholders to continue to inform, build a common motivation, and advance mutually desirable objectives, and e) identify which entities can serve as backbone organizations to continue coordinating the entire initiative going forward.

The final project report by all experts assembled for this project will set forth the collective recommendations for action to address the key challenges identified in this proposal. We anticipate that this agenda will include a variety of related but discrete subsequent programs that will be well-aligned through the structure of the Collective Impact Framework. The final project report will be published in November 2018 and will be widely disseminated through the project social media strategy.

**National Impact**

The PEGI National Forums project will engage a broad group of experts, institutional leaders, and stakeholders to develop a cooperative national action agenda for preserving and providing access to at-risk government digital information of long term historical significance. By bringing together a wide variety of motivated stakeholders to develop a plan for collaborative action, this project will address the needs identified in the preparatory meetings and reports that led up to this proposal, which we feel have continued to assume a larger and larger shadow of concern in the national consciousness.

The PEGI National Forums project will produce a number of catalytic outcomes. The project will host six Mini-Forums with different stakeholder groups, two Webinar Forums with more distributed stakeholder groups, and a concluding National Forum that assembles motivated experts to directly address this critically important national issue. All of these events will produce individual reports that will be widely disseminated, with the major culminating report synthesizing all findings and setting for a national action agenda for collaboration between stakeholder groups.

Our country is now at serious risk of permanently losing access to a great deal of our shared national information. Holding the PEGI National Forums is a way of actively addressing fears shared by scientists, librarians, and citizens alike now concerned with “the ease with which electronic records can be altered, encrypted, or destroyed.” Ensuring the distributed survival of the official information of the nation in this critical period of increasing information loss should be a major priority for cultural memory organizations as well as citizenry alike. The PEGI National Forums will convene a broad range of stakeholders to respond actively and in a structured manner to this challenge.
APPENDIX A: ENDNOTES


2 Peet, ibid.


9 See http://www.ppehlab.org/datarescue-events/ for a list of DataRescue events that have been held.


15 Reilly, p. 5.
<table>
<thead>
<tr>
<th>ID</th>
<th>Task Name</th>
<th>Start</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>1 Planning and Initial Forums Phase</strong></td>
<td>Fri 12/1/17</td>
</tr>
<tr>
<td>2</td>
<td>1.1 December Project Kickoff SC Meeting</td>
<td>Fri 12/15/17</td>
</tr>
<tr>
<td>3</td>
<td>1.2 AHA Mini-Forum</td>
<td>Sat 1/6/18</td>
</tr>
<tr>
<td>4</td>
<td>1.3 AAAS Mini-Forum</td>
<td>Sat 2/17/18</td>
</tr>
<tr>
<td>5</td>
<td>1.4 March Webinar</td>
<td>Fri 3/2/18</td>
</tr>
<tr>
<td>6</td>
<td>1.5 March SC Meeting</td>
<td>Fri 3/23/18</td>
</tr>
<tr>
<td>7</td>
<td>1.6 May Webinar</td>
<td>Fri 5/18/18</td>
</tr>
<tr>
<td>8</td>
<td>1.7 ALA Mini-Forum</td>
<td>Sat 6/23/18</td>
</tr>
<tr>
<td>9</td>
<td><strong>2 Primary Forum Phase</strong></td>
<td>Mon 7/2/18</td>
</tr>
<tr>
<td>10</td>
<td>2.1 July SC Meeting</td>
<td>Fri 7/20/18</td>
</tr>
<tr>
<td>11</td>
<td>2.2 SAA Mini-Forum</td>
<td>Tue 8/14/18</td>
</tr>
<tr>
<td>12</td>
<td>2.3 iPRES Mini-Forum</td>
<td>Wed 9/26/18</td>
</tr>
<tr>
<td>13</td>
<td>2.4 IDW2 Mini-Forum</td>
<td>Fri 10/12/18</td>
</tr>
<tr>
<td>14</td>
<td>2.5 PEGI National Forum</td>
<td>Sun 10/14/18</td>
</tr>
<tr>
<td>15</td>
<td>2.6 November SC Meeting</td>
<td>Fri 11/16/18</td>
</tr>
</tbody>
</table>

![Gantt Chart](chart.png)
IMLS BUDGET FORM

a. Legal name (5a from SF-424S): University of North Texas

b. Requested Grant Period From: (MM/DD/YYYY) 12/01/2017 Through: (MM/DD/YYYY) 11/30/2019

c. If this is a revised budget, indicate application/grant number:

1. Salaries and Wages

<table>
<thead>
<tr>
<th>Name/Title or Position</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Grant Fund</td>
<td>Cost Share</td>
<td>Grant Fund</td>
<td>Cost Share</td>
</tr>
<tr>
<td>Graduate Assistant</td>
<td>$8,883</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subtotal</td>
<td>$8,883</td>
<td></td>
<td></td>
<td></td>
</tr>
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</table>

2. Fringe Benefits

<table>
<thead>
<tr>
<th>Rate and Base</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Grant Fund</td>
<td>Cost Share</td>
<td>Grant Fund</td>
<td>Cost Share</td>
</tr>
<tr>
<td>8.65% plus insurance premiums</td>
<td>$2,498</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subtotal</td>
<td>$2,498</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
IMLS BUDGET FORM

a. Legal name (5a from SF-424S): University of North Texas

3. Travel

<table>
<thead>
<tr>
<th>From/To and Purpose</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Grant Fund</td>
<td>Cost Share</td>
<td>Grant Fund</td>
<td>Cost Share</td>
</tr>
<tr>
<td>Attend and host 6 project</td>
<td>$7,200</td>
<td></td>
<td>$7,200</td>
<td></td>
</tr>
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</table>

Subtotal: $7,200

4. Supplies, Materials, and Equipment

<table>
<thead>
<tr>
<th>Item</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Grant Fund</td>
<td>Cost Share</td>
<td>Grant Fund</td>
<td>Cost Share</td>
</tr>
</tbody>
</table>

Subtotal

5. Contracts and Subawards

<table>
<thead>
<tr>
<th>Item</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Grant Fund</td>
<td>Cost Share</td>
<td>Grant Fund</td>
<td>Cost Share</td>
</tr>
<tr>
<td>Educo</td>
<td>Subaward</td>
<td>$57,088</td>
<td>$57,088</td>
<td></td>
</tr>
<tr>
<td>Educo</td>
<td>Contract</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Educo</td>
<td>Subaward</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Subtotal: $57,088
a. Legal name (5a from SF-424S): University of North Texas

### 6. Student Support

<table>
<thead>
<tr>
<th>Item</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Grant Fund</td>
<td>Cost Share</td>
<td>Grant Fund</td>
<td>Cost Share</td>
</tr>
<tr>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

Subtotal

### 7. Other Costs

<table>
<thead>
<tr>
<th>Item</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Grant Fund</td>
<td>Cost Share</td>
<td>Grant Fund</td>
<td>Cost Share</td>
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<tr>
<td></td>
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</tr>
</tbody>
</table>

Subtotal

### 8. Total Direct Costs

<table>
<thead>
<tr>
<th>Item</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Grant Fund</td>
<td>Cost Share</td>
<td>Grant Fund</td>
<td>Cost Share</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subtotals (Items 1-7)</td>
<td>$75,669</td>
<td>$75,669</td>
<td>$75,669</td>
<td>$75,669</td>
</tr>
</tbody>
</table>
**9. Indirect Costs** (Read the instructions about Indirect Costs before completing this section.)

- ○ Current indirect cost rate(s) have been negotiated with a federal agency.
  - Name of Agency: DHHS
  - Expiration Date: 08/31/2020
- ○ Indirect cost proposal has been submitted to a federal agency but not yet finalized.
  - Name of Agency: 
  - Proposal Date: 
- ○ Applicant chooses a rate not to exceed 10% of modified total direct costs, and declares it is eligible for the 10% rate.
- ○ Applicant chooses not to include indirect costs.

<table>
<thead>
<tr>
<th>Rate and Base</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Grant Fund</td>
<td>Cost Share</td>
<td>Grant Fund</td>
<td>Cost Share</td>
</tr>
<tr>
<td>26% Off Campus Rate, Modified</td>
<td>$11,331</td>
<td></td>
<td></td>
<td>$11,331</td>
</tr>
<tr>
<td>Indirect Costs Subtotal</td>
<td>$11,331</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**10. Total Project Costs**

<table>
<thead>
<tr>
<th></th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Grant Fund</td>
<td>Cost Share</td>
<td>Grant Fund</td>
<td>Cost Share</td>
</tr>
<tr>
<td>Total Direct &amp; Indirect Costs</td>
<td>$87,000</td>
<td></td>
<td></td>
<td>$87,000</td>
</tr>
<tr>
<td>Total Costs (excluding student support)</td>
<td>$87,000</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Budget Justification

The budget includes $8,883 for a graduate assistant. This figure was produced by UNT Office of Research following guidelines for GRAs. Likewise the fringe benefits for this graduate research assistant.

Travel for two UNT project staff (PI and graduate researcher) was set at $7,200 for 6 trips, at $1,200 per trip, based on federal cost schedules and averages for Washington D.C.

The Educopia Subcontract is documented below.

UNT IDC rates determined the indirect costs allocation.

Additional detail is available for any of these figures, however this budget is fairly straightforward.

Educopia Subcontract Budget Justification:

<table>
<thead>
<tr>
<th>Cost</th>
<th>Amount</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staffing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Skinner</td>
<td>$2,500.00</td>
<td>2.5% for 1 year</td>
</tr>
<tr>
<td>Clerical Staff</td>
<td>$2,187.87</td>
<td>80 hrs</td>
</tr>
<tr>
<td>Total Staffing</td>
<td>$4,687.87</td>
<td></td>
</tr>
<tr>
<td>Travel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mini-Forums</td>
<td>$14,400</td>
<td>6 trips for 2 people per trip, cost per trip at $1,200</td>
</tr>
<tr>
<td>National Forum</td>
<td>$28,000</td>
<td>1 trip for 24 people, cost per trip at $1,200</td>
</tr>
<tr>
<td>Total Travel</td>
<td>$42,400</td>
<td></td>
</tr>
<tr>
<td>Meeting Costs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food</td>
<td>$5,000</td>
<td>Working breakfast/lunch for 5 mini-forums and the Forum</td>
</tr>
<tr>
<td>Sites</td>
<td>$3,000</td>
<td>Anticipated costs for sites</td>
</tr>
<tr>
<td>Technology</td>
<td>$1,000</td>
<td>Anticipated technology costs for sites</td>
</tr>
<tr>
<td>Supplies</td>
<td>$1,000</td>
<td>Anticipated meeting supplies costs</td>
</tr>
<tr>
<td>Total Meetings</td>
<td>$10,000</td>
<td></td>
</tr>
<tr>
<td>Total Budget</td>
<td>$57,087.87</td>
<td></td>
</tr>
</tbody>
</table>

Staffing

Katherine Skinner (Executive Director, Educopia Institute) will devote 2.5% of her time for 1 year to the project as its PI and lead voice at Educopia. In that time, she will provide guidance to
the clerical staff regarding travel and hosting arrangements; she will also provide guidance and feedback to the project team regarding how to plan and facilitate the mini-forums and whom to invite to and how to facilitate the national forum.

Clerical Staff will devote 80 hours to the tasks of booking travel, scheduling meetings, planning events (food, lodging), and handling reimbursements.

Travel
The main line item in this budget is travel, which is budgeted at an average of $1,200/trip for two day/one night trips to 6 conference mini-forums (6 trips for 2 people per trip, or $14,400) and to a National Forum (24 people total for one trip, or $28,000).

Meeting Costs
Meeting costs anticipated at this time include food (working breakfasts/lunches for five mini-forums and for the National Forum); site hosting costs (for five mini-forums and for the National Forum); Technology costs (renting projector/sound for the National forum), and supplies (printing, flash drives for the proceedings). The total meeting costs anticipated are $10,000.
List of Key Project Staff and Consultants

1. Roberta Sittel (UNT)
2. Martin Halbert (UNC Greensboro),
3. Marie Concannon (University of Missouri),
4. James Jacobs (Stanford University),
5. Heather Joseph (SPARC),
6. Lynda Kellam (UNC Greensboro),
7. Shari Laster (UC Santa Barbara),
8. Scott Matheson (Yale University)
9. Bernard Reilly (CRL),
10. Katherine Skinner (Educopia Institute),
11. Bethany Wiggin (Pennsylvania),
12. Marie Waltz (CRL),
Robert Sittel

**Education**

**Masters of Library Science** - May 2005  
*University of North Texas, Denton, Texas*

**Bachelor of Arts, English** - May 2000  
*Texas Woman’s University, Denton, Texas*

**Employment History**

**Government Information Librarian;** June 2014-Present  
Government Information Connection, Eagle Commons Library, University of North Texas, Denton, Texas

- Responsible for the overall activities of the Government Information Connection
- Serves as the primary contact to the Federal Depository Library Program, as administered by the Government Printing Office.
- Maintains collection development of the federal and state documents collections (physical and electronic) as well as the Libraries’ Legal Collection and General Map Collection.
- Coordinates technical services activities in the department, including the establishment of policy and standards, and oversight of workflow procedures and priorities.
- Collaborates with the Head of the Digital Projects Dept. to initiate and manage partnerships with state and federal agencies to provide permanent public access to government information.
- Seeks appropriate outside funding for projects involving government information.
- Fosters collaborative relationships with other institutions to provide public access to the collections and services at the Eagle Commons Library including the Government Information Connection and Funding Information Network.
- Actively promotes the Government Documents and ECL collections and services to the University and outside organizations and community groups through responding to university and community initiatives and requests

**Government Information & Research Librarian;** 2007-2014  
Tulsa City-County Library, Tulsa, Oklahoma

- Serve as Federal, State and Local Publications coordinator
- Member of the main reference/research team, providing reference assistance
- Supervise the Government Documents Clerk by overseeing daily activities, setting annual goals, and writing annual review
- Acting Research Center manager as needed
- Law, Political Science, Military, & Public Administration subject specialist
- Oversee collection maintenance and acquisitions for the 320s, 340s, & 350s
- Develop workshops and programs on own, with fellow librarians and by partnering with outside organizations
- Set priorities for print and electronic collections
- Maintain online ready reference research guides to support and supplement government information, law, political science, and military collections
• Participate in community outreach, including local chamber activities, programming and more
• Maintain a library-sponsored blog to inform the public and library staff of relevant federal, state, and local government goings-on
• Maintain an active presence in the Oklahoma depository community through committee participation, workshops, and meetings
• Build online digital collection of local government documents

Professional Memberships
American Library Association (ALA), 2004-Present
  Government Documents Round Table (GODORT), 2007-Present
  Reference and User Services Association (RUSA), 2014-Present
  Map and Geospatial Information Round Table (MAGIRT), 2014-Present
Texas Library Association (TLA), 2014-Present
  Government Documents Round Table (GODORT), 2014-Present

Professional Service & Leadership
Federal Depository Library Program’s Depository Library Council, 2017-2018
ALA GODORT Publications Committee Incoming Chair, 2017-2019
TLA GODORT Chair, 2016-2017
ALA GODORT Webmaster, 2014-Present
ALA GODORT Notable Documents Selector, 2009-2015

Grants & Awards
Texas State Library & Archives Library Cooperation Grant for FY2017
Dean’s Innovation Grant for FY 2017
Green Light to Greatness Grant for FY 2016

Select Presentations & Publications


Dr. Martin Douglas Halbert
1215 Lakewood Drive, Greensboro, NC 27410
Work Phone: 888-245-0180

EDUCATION

Emory University, Information Science/Interdisciplinary Liberal Arts, Ph.D., 2006.
Rice University, Philosophy, Bachelor of Arts, 1984.

APPOINTMENTS

Dean of University Libraries (7/17 – ) University of North Carolina at Greensboro, Greensboro, NC.
Serves as the chief administrative officer for the University Libraries. Responsible for all programs and unit activities within the Libraries, the Dean leads planning, administration, fundraising, and personnel efforts to further sustain and improve Libraries operations and services. The Dean of University Libraries develops and executes the mission of the Libraries, addressing rapidly changing needs of students and technology. Cultivates service-oriented staff, and manages the Libraries’ fiscal resources. Maximizes the existing physical space and library facilities while developing long-term strategies for space renovation and renewal. Expands library services beyond its physical walls through remote and ‘just in time’ support access to meet the needs of UNCG’s growing body of distance and non-traditional students.

Dean of Libraries and Associate Professor (10/09 – 7/17) University of North Texas, Denton, TX.
The Dean of Libraries is the chief executive officer of the University Libraries and provides leadership and overall management of the libraries. Also serves with a faculty appointment in the College of Information. Responsible for providing strategic, entrepreneurial, organizational adaptation, and visionary leadership for the Libraries; all fiscal and personnel matters; and fostering excellence in teaching, research, and service. Serve as primary advocate for the Libraries within the University and at regional, national, and international levels, actively participating in outreach, marketing, and development. Implemented shared governance practices, cultivated strong collaborative relationships with faculty, and supported distributed learning and innovative information technology implementation. Specific responsibilities include planning, overseeing development and management of all Libraries’ informational resources, budget preparation, resource allocation, development of technological infrastructure and informational resources to support the University’s mission, support of distributed learning in cooperation with information technology administrative units, and management of the relationships of the Libraries with the University and external groups.

Director for Digital Innovations (2/07- 9/09) University Libraries, Emory University, Atlanta, GA. Direct all digital innovations program initiatives for the Emory University Libraries as principal investigator for major sponsored projects. Adjunct professor in the Emory Graduate Institute of the Liberal Arts leading development of campus doctoral certificate in Digital Scholarship and New Media. As principal investigator for research projects totaling $3.1M and president of the MetaArchive Cooperative (http://www.MetaArchive.org), led project staff of 40 librarians, scholarly communication analysts, programmers, and other technical specialists at Emory and other institutions. Principal investigator of Librarians for the Digital Age MLIS program for north Georgia, an IMLS-funded partnership with University of North Texas. Principal investigator for the Transatlantic Slave Trade Voyages and Origins projects offering comprehensive access to primary research datasets covering the four centuries of the Transatlantic Slave Trade (http://www.SlaveVoyages.org).

Director for Digital Programs and Systems (4/96 - 2/07) University Libraries, Emory University, Atlanta, GA. Directed all digital library services and systems functions for the Emory General Libraries. Provided leadership role within the library for computer systems operations, development, planning, and integration. Responsible for researching and leading library information technology initiatives, including all digital scholarly communication projects of the MetaScholar Initiative (http://www.metascholar.org). Supervised 38 staff, including librarians, programmers, graduate research assistants, and other professional staff. Principal investigator for research projects totaling $2.4M. Established the MetaArchive Cooperative (http://www.MetaArchive.org).

ALA Library Fellow (8/94 - 12/94) American Library Association, Chicago, IL. Work performed in Tartu, Estonia. Developed a comprehensive library automation plan for national university library of Estonia, including goals for ILS acquisition, LAN infrastructure development, and service enhancements. Assisted in inauguration of the INGRID OPAC. Developed successful grant proposals for 1) funding for professional conference attendance, and 2) acquisition of approximately $90K of CDROM formats and equipment. Made presentations at conferences and for the Estonian Librarians Association.

Head of Networked Systems (12/92 - 4/96) Fondren Library, Rice University, Houston, TX. Managed library systems department. Supervised all system administrators and student assistants. Worked as member of the university Unix systems and LAN administration group. Responsible for overseeing operations, development, and enhancements of all library LAN and microcomputer systems. Coordinated library computer operations with all library departments as well as other campus computing entities. Provided
leadership role within the library for computer training, planning, and system development and integration. Continued to provide collection development services from previous position.

Automation and Reference Librarian (1/88 - 12/92) Fondren Library, Rice University, Houston, TX. Hired to serve in three areas: Automation: Planned and implemented a variety of library automation projects; examples include CD-ROM networking upgrades, OPAC information screens, and Internet training for library staff. Branch library manager: Designed and implemented branch library. Supervised 4 FTE paraprofessional and student assistant staff at branch library. Created catalog and circulation systems using microcomputer DBMS. Central library reference and collection development: Responsible for $186K annual collection development funds in areas of computer science, electrical engineering, math sciences, and philosophy. Provided reference services, including online searching.

Information Services Consultant (8/87 - 12/87) ROLM Corporation, Austin, TX. Created and managed market research library. Provided reference services. Supervised clerical assistant.


SELECTED PUBLICATIONS


"MetaArchive: A Cooperative Approach to Distributed Digital Preservation," (with Katherine Skinner), Against the Grain v. 21, no. 1 (Feb 2009) p. 36-42.


GRANTS AND CONTRACTS RECEIVED


NDIIPP: 2007 MetaArchive of Southern Digital Culture Project, Phase II ($562K), 2004 MetaArchive of Southern Digital Culture Project, Phase I ($690K)

NEH: 2008 Identifying the Origins of the Transatlantic Slave Trade from Diasporic Communities ($350K), 2006 The Expanded On-Line Trans-Atlantic Slave Trade Database ($325K)

NHPRC: 2007 MetaArchive: A Sustainable Digital Preservation Service for Cultural and Historical Records ($400K)

NSF: 2003 OCKHAM Project ($425K)

EDUCATION
University of Missouri – Columbia, Library & Information Science, MA, 1989
University of Missouri – Columbia, Educational & Counseling Psychology, Bachelor of Educational Studies, 1987

WORK EXPERIENCE
Head, Government Information (03/08 - ) and Government Documents Librarian (08/00 – 02/08) MU Libraries.
As Missouri’s Federal Depository Library Program (FDLP) regional coordinator, I provide leadership, training and statewide conferences for 28 FDLP libraries in Missouri and manage a shared statewide collection development policy. My local responsibilities include document selection, organization, maintenance, bibliographic control, and access policy for tangible and electronic government materials as well as corresponding library instruction and reference service. Since 2002 I have served as MU’s Official Representative to the Inter-university Consortium for Political and Social Research (ICPSR), educating campus affiliates on the availability of data for quantitative research. I assist users in identifying datasets for research projects, troubleshoot technical problems and develop MU Libraries’ local data holdings. I supervise one full time Librarian and several student assistants. Promoted to Librarian III in 09/2005 and to Librarian IV in 09/2015.

Working in the Historical Society’s library, I provided reference and research service and composed research guides. I selected at-risk collections and prepared them for preservation. I represented the Society at genealogical and historical conferences and spoke to local genealogical, historical and museum groups. Webmaster, 1998-2000.
My works published by the State Historical Society of Missouri include:
- *Index to Missouri military pensioners, 1883.* (1997)

PROFESSIONAL SERVICE, NATIONAL AND STATE
  The purpose of the Council is to advise the Public Printer and the Superintendent of Documents on policy involving cataloging and indexing of documents, availability of publications to patrons and the public and general administration of the program.
- Chair, DLC Subcommittee (03/2013 -04/2014) to plan for implementation of the National Academy of Public Administrators’ Recommendation #3 as published in the report *Rebooting the Government Printing Office: Keeping America Informed in the Digital Age* (source). The subcommittee was charged to assist GPO in developing a comprehensive national plan for preserving the complete collection of government documents dating from 1789-present, including cataloging, digitizing, and preserving tangible copies.
- Secretary of the Missouri Library Association, 2005.

PROFESSIONAL SERVICE, LOCAL
- Chair, University of Missouri Student Financial Aid Committee, 2015-2016. Member, 2013-2015. (More info)

Marie Concannon
106-B Ellis Library, University of Missouri-Columbia (MU)
Work Phone: 573-882-0748
**SELECTED PRESENTATIONS**

“Preservation and Access: Framing the *How Many* Question,” presented as part of the Spring FDLP virtual conference “Navigating through Change, the Conversation Continues” with co-presenters: Christopher C. Brown, University of Denver University Libraries; Daniel Cornwall, Alaska State Library; Larry Romans, Vanderbilt University Library. Presented online April 29, 2015. [Recording online.](#)

“Needles in the haystack of history: How to use the WPA Historical Records Survey,” co-presented with Dr. Kristine Stilwell, Government Documents and Business Librarian at Troy University in Alabama, and Sandra McAninch, Head of the Federal Depository Unit & Regional Depository Librarian at the University of Kentucky (Description). Sponsored by ALA GODORT, presented at Annual Conference, Las Vegas, 06/30/2014. [Repeated](#) for the FDLP Academy on 10/21/2014.

- “Streamlining the disposal process: Making it easier for everyone,” co-presented with Hallie Pritchett, Map and Federal Regional Depository Librarian at the University of Georgia Library, Athens.
- “The Comprehensive preservation plan for government documents: A discussion of NAPA Recommendation #3,” panel presentation co-organized with Kate Irwin-Smiler, Reference Librarian and Instructor at the Wake Forest University School of Law Library in Winston-Salem NC, and Stephanie Braunstein, Head of Government Documents and Liaison to Political Science at Louisiana State University Library in Baton Rouge.

“Resolving anticipated barriers to digital access,” presented as part of the FDLP virtual conference “Expanding the Forecast Framework: Engage and Discuss,” held December 11, 2013.


**AWARDS and HONORS**

**ALA GODORT Bernadine Abbott Hoduski Founders Award, 2014**
This award is presented annually by the ALA Government Documents Roundtable to one librarian who makes “significant contributions to the field of state, international, local or federal documents.” [Text online.](#)

Awarded a place in the UM System Academic Leadership Institute’s [Leadership Development Program](#) (2013-2014). The competitive application process was open to faculty and administrative leaders at all UM campuses in the state. The year-long program involved full day retreats and workshops filled with presentations, problem-solving exercises, and a battery of tests designed to enhance knowledge of oneself as a leader.

**SELECTED MEDIA ACKNOWLEDGEMENTS**

- “MU librarian steps up as federal government websites shut down,” *Columbia Missourian*, October 10, 2013.
SYNOPSIS:

**Library Experience** – 24 years of increasing responsibility and professional experience in all aspects of Library Science, including international, CA state and US government information, collection management, statistics and data, reference and instruction, research, access services, information architecture, and digital libraries.

**Technology Expertise** – Highly skilled in the use of library information systems and databases; Web harvesting and archiving; OSX, UNIX, LINUX, and Windows operating systems; open source content management systems, blogs and wikis; Networking; HTML; CSS; XHTML; XML; PHP; MySQL; Web design; digitization workflow.

EDUCATION:

Master of Science in Library and Information Science  
*University of Illinois at Urbana-Champaign*  
Awards: Irwin Library Fellowship and GSLIS Faculty Social Justice Award  
May 2002

High School Teaching Certification  
*State University of New York at Cortland*  
May 1992

Bachelor of Arts, Political Science, Russian Studies, American History  
*State University of New York at Cortland*  
May 1989

PROFESSIONAL EXPERIENCE:

**Federal Government Information Librarian, Depository Library Coordinator**  
*Humanities and Social Sciences Resource Group, Green Library, Stanford University*  
October 2006 ~ Present

- Develop and manage US document collection and coordinate Federal Depository Library Program (84% selective #0051).
- Maintained CA, international, intergovernmental and British government collections including UN, European Union, WTO, OAS, ICAO and IMO depositories.
- Support research across the university via instruction and reference consultations. Collaborate with librarians on Federal documents and data needs and services. Teach workshops on Zotero and bibliographic citation management.
- Build and maintain digital collections. Manage HSSRG Archive-it Web harvesting subscription (6.8TB archived as of May 2017), administer LOCKSS-USDOCS Private LOCKSS Network (lockss-usdocs.stanford.edu), TRAIL, and collect and Integrate digital collections into acquisition and cataloging workflows via Everyday Electronic Materials (EEMs).

**User Services Technology Specialist**  
*Cubberley Education Library, Stanford University*  
March 2006 ~ October 2006

- Developed and managed public computer clusters. Support hardware and software needs of Cubberley Library staff and users including servers, desktop and laptop machines, printers, scanners, handheld devices, and multimedia. Trained staff and users in the use of new technology-assisted services.
- Identified, analyzed, and implemented new technologies. Worked in conjunction with IT staff across the library system to support technology-based user services.
- Maintained Cubberley library’s Web presence.
- Provided reference and public services to the School of Education and the wider Stanford community.
Local, State, and International Government Information Librarian  
October 2002 ~ November 2005  
Social Sciences and Humanities Library (SSHL), University of California, San Diego

- Managed the physical and digital collections in the areas of CA, San Diego, and International government information (including UN, EU, IGOs, NGOs). Provided assistance as needed for Federal documents, data, maps and GIS. Provided lead and project management for government documents stacks manager and acquisitions assistant. Completed the ICPSR workshop, “Providing Social Science Data Services.”
- Carried out collection development and Liaison responsibilities to the departments of Urban Studies and Environmental Studies.
- Provided reference in government information, Social Sciences, and Humanities in person, via email and through the UC-wide chat reference pilot project.
- Participated as a curator for the CA Digital Library’s Web-at-Risk project.

Consultant, Online Authority File Workshop  
May ~ June 2001
Illinois OCLC Users’ Group (IOUG) and the Illinois State Library

- Web Site Designer.
- Researched, developed and organized workshop content in the personal names area of the authority file.
- 2002 LITA/Library Hi Tech Award for Outstanding Communication for Continuing Education in Library and Information Science.

PUBLICATIONS/PRESENTATIONS:

All publications and presentations 2002 – present are freely available online at freegovinfo.info/about/jrjacobs

PROJECTS OF NOTE:

- Preservation of Electronic Government Information (PEGI) project
- LOCKSS-USDOCS network coordinator [lockss.org/lockss/Government_Documents_PLN]
- Member, Congressional Data Coalition [congressionaldata.org]
- Stanford Open Source Lab [oslblog.stanford.edu]. Co-founder
- Question Copyright [questioncopyright.org]. Advisory board member
- Free Government Information [freegovinfo.info]. Co-founder
- Radical Reference [radicalreference.info]. Co-founder
- Regional Workbench Consortium “Regional Planning Chronologies” (2002 – 2005) [regionalworkbench.org (see projects section)]
- Counterpoise Review Journal [www.counterpoise.info/]. Advisory board member.
- Urbana-Champaign Independent Media Center (U-C IMC), Urbana, IL. Co-founder.

HONORS:

- Member, Beta Phi Mu International Library and Information Studies Honor Society
- Mover and Shaker Reference Visionary, Library Journal, 2005  
  [www.libraryjournal.com/article/CA510575.html]

PROFESSIONAL MEMBERSHIPS & COMMITTEES:

- Depository Library Council 2009 – 2012, Chair, 2011-12
- American Library Association (ALA) Government Documents Round Table (GODORT), member
- Association of College and Research Libraries (ACRL), member
- Library Information Technology Association (LITA), member
- GODORT Publications Committee (2008 – 2009), Chair
- Editor, GODORT Occasional Papers (2008 – present)
- GODORT Government Information Technology Committee (GITCO) (2002 – 2006), Chair and Web administrator
- GODORT Web Administrators Committee (2002 – present), member & wiki administrator
- Govdoc-l (2002 – present), Moderator and Web administrator
Professional Experience

**Executive Director, SPARC (Scholarly Publishing and Academic Resources Coalition) (2005 - present)**
Direct all strategic and operational activities of international alliance of academic and research libraries dedicated to promoting the global, cost-effective, digital dissemination of research.

Lead SPARC’s public policy initiative on Open Access. Communicate regularly with policy makers in Congress, Federal Agencies, and Executive Branch. Prepare and deliver written and oral testimony and commentary, and provide regular support to member organizations and partners to do the same.

Direct the Open Access Working Group (OAWG), a coalition of major U.S. national research and advocacy organizations. Define and implement collective national communications and lobbying strategies. Identify, hire and direct professional lobbying and PR firms on behalf of the OAWG.

Develop strategic partnership and coalition relationships to enhance effectiveness of programs. Regularly expand and diversify SPARC’s roster of partners, including library and higher education organizations, major publishers, information and tech companies, advocacy organizations, and international NGO’s.

Oversee SPARC’s international operations in Europe and Asia Pacific; currently responsible for expansion into Latin America and Africa.

Present frequent invited presentations at campus, national and international events. Serve as frequent media contact for commentary on issues relating to scholarly communications.

**President & Chief Operating Officer, BioOne, (2000 – 2005)**
Led the start-up and launch of innovative Library / Publisher partnership-driven of biological science journal publishing enterprise. Directed business, operational, administrative, and strategic development of online aggregation of biological science journals. BioOne is currently a successful, $7m / year non-profit publisher.

Directed electronic and print publishing program for 10,000-member scientific society. Developed and implemented online products. Developed innovative partnerships, including one with the NIH to include flagship journal as publication in PubMed Central open access repository.

Directed operations of organization’s journal program. Oversaw transition of *The Journal of Neuroscience* from print to web publication. Developed new online services, fully electronic publishing processes, from manuscript submission to final publication services.

Managed and developed print and electronic products in Computer Science and Mathematics. Negotiated acquisitions and developed and produced new titles. Developed new electronic publications and research tools.

With Executive Director, established and directed the Society’s Electronic Publishing program. Co-authored plan that outlined vision for conversion of print publishing operation to online. Co-Principal Investigator on NSF grant to build a prototype electronic journal. Successfully demonstrated prototype in January 1995.
Selected Recent Board and Committee Service

**Impact Story**, Board of Directors (2014 – present)
**Public Library of Science,** Board of Directors, (2012 – 2016)
**National Academies of Science Study Committee on Digital Curation,** Member (2011-2013)
**Microsoft Academic Search,** Advisory Board Member (2012-2013)
**PubMed Central National Advisory Committee, NIH,** Board Member (2005-2007)
**Society for Scholarly Publishing,** Board of Directors & President (2002 – 2005)

Education

**MS, Administration, The University of Maryland,** December 1997
**BS, Journalism, The University of Maryland,** and 1989 Minor: Information Systems

Selected Recent Invited Presentations and Publications

Lynda Kellam  
UNCG, Jackson Library,  
PO Box 26170, Greensboro NC 27402-6170  
Imkellam@uncg.edu

Education

- University of North Carolina at Greensboro, Ph.D. in History, 2015-present
- University of North Carolina at Greensboro, Master of Library and Information Studies, 2007
- University of Wisconsin-Madison, Master of Arts in Political Science, 2000
- University of North Carolina at Greensboro, Bachelor of Arts in Political Science, 1997 (summa cum laude)

Library Experience

University Libraries, University of North Carolina at Greensboro  
Data Services and Government Information Librarian  
May 2007-present

- Provide specialized reference consultations and instruction for numeric data and government sources to faculty and students.
- Provide specialized reference consultations and course-integrated library instruction sessions for the Departments of Political Science, History, and Peace and Conflict Studies.
- Provide oversight for the Libraries' Federal Depository Library Program (FDLP) and North Carolina state collections and supervise documents manager.

International & Global Studies Program, University of North Carolina at Greensboro  
Assistant Director  
January 2016-present

- Provide advising to the Affairs & Development students within the International & Global Studies interdisciplinary program.
- Teach the introductory core course (IGS 200) once per academic year.

Selected Publications

BOOKS


BOOK CHAPTERS


ARTICLES

Selected Presentations


Selected Workshops


Professional Affiliations

- *International Association for Social Science Information Service & Technology (IASSIST)*, 2007-present
  - Administrative Committee: USA At-Large Committee Member, 2013-present
- *American Library Association*, 2004-present
  - Association of College and Research Libraries, Law and Political Science Section (now PPIRS): Chair, 2013-2014
  - Government Documents Round Table: Member, Publications Committee, 2016-present
- *North Carolina Library Association*, 2006 – present
  - Government Resources Section: Chair, 2011-2013

Honors and Awards

- *Phi Beta Delta International Honor Society*, elected to Eta Delta Chapter for service to international studies, 2016.
- NewsBank/Readex/GODORT/ALA Catherine J. Reynolds Research Award, received in support of the NCLA GRS “Help! I’m an Accidental Government Information Librarian” webinar series, 2015.
- *UNC-Chapel Hill’s School of Education Early Career Award*. Awarded in April 2013
- *American Library Association’s Emerging Leaders Program*, Selected to participate in the Emerging Leaders class of 2010 with Government Documents Round Table sponsorship.
- Fulbright Student Fellow to study and conduct research in Zagreb, Croatia, January – October 2002.
Curriculum Vitae: June 2017

Shari Laster
Government Information Librarian // Data Services Librarian
University of California, Santa Barbara
Santa Barbara, CA 93106-9010
slaster@ucsb.edu

Education
The University of North Carolina at Chapel Hill (Chapel Hill, NC). M.S.L.S., 2007
Rice University (Houston, TX). B.A., Philosophy and Religious Studies, 2004

Library Experience
Government Information Librarian & Data Services Librarian, Interdisciplinary Research Collaboratory, University Library, University of California, Santa Barbara, 2016–
Government Data & Information Librarian, Reference Services, University Library, University of California, Santa Barbara, 2014–2016
   Associate Librarian, 2014–
   Associate Professor of Bibliography, 2013–2014
   Assistant Professor of Bibliography, 2008–2013

Selected Teaching Experience
Kent State University (Ohio), 2016–
   Government Information Sources & Services (graduate course), Spring 2016, Spring 2017

Selected Bibliography

Articles

Book Chapters
Presentations
Keynote speaker for The University of Akron University Libraries Federal Depository Library Program 50th Anniversary celebration (13 September 2013).

Selected Professional Service and Affiliations
American Library Association (ALA), 2006–
- Government Documents Round Table (GODORT), 2008–
  - Assistant Chair/Chair-Elect, 2016–
  - Rare and Endangered Government Publications Committee, Chair, 2013–2016
  - Legislation Committee, 2010–2012
  - Government Information Technology Committee (GITCO), 2008–2010
    - Chair, 2009–2010
Beyond the Numbers, Conference Planning Committee, 2015–2016
Government Documents Round Table of Ohio (GODORT of Ohio), 2008–2014
- Program Chair/President-Elect, 2013–2014
- Digital Collections Working Group, Chair, 2010–2014
Depository Library Council (DLC) to the Public Printer, 2010–2013
- Chair-Elect, 2011–2012; Chair, 2012–2013
Scott Matheson
60 Ralston Avenue, Hamden, CT 06517 | smatheson@mac.com | 203.288.0944

Education
University of Connecticut, Department of Public Policy, M.P.A. 2014
University of Washington, Information School, M.L.I.S. 2001
University of Washington, School of Law, J.D. 2001
University of Alaska Fairbanks, College of Liberal Arts, B.A., cum laude, 1997

Work Experience
*January 2013–present, Associate Librarian for Technical Services, Yale Law School*
  - Oversee library technical services, including acquisitions, serials control, cataloging and electronic resource management.

*August 2011—July 2013, Librarian for Digital Resources, Yale Law School*
  - Oversee the lifecycle of all electronic resource purchases and subscriptions, from trials to payments, including renewals and cancellations. Troubleshoot all problem reports. Coordinate efficient Law Library and University electronic resource management.

*May 2008—August 2011, Web Manager, Yale University Library*
  - Support the internal and external online communications of a large academic research library. Guide development and use of new tools for discovering and using the university’s cultural collections. Participate in programs that provide direct research and education support to students and faculty.

*April 2006—May 2008, Head of Public Services, University of Colorado Wm. A. Wise Law Library*
  - Provide reference service to library patrons. Manage public services department of five librarians and staff, including interlibrary loan, circulation and stacks maintenance functions. Teach first-year legal research sessions and advanced legal research course. Assist with creation and maintenance of library web pages and brochures. Also appointed Instructor of Law.

*October 2001—December 2003, Visiting Reference Librarian, Yale Law School*
*January 2004—March 2006, Reference & Government Documents Librarian, Yale Law School*
  - Provide reference services to faculty, students, staff and other library patrons. Manage United States government depository collection and staff. Teach first-year and advanced legal research sessions. Assist with creation and maintenance of library web pages and brochures. Faculty-voted appointment as Lecturer in Legal Research.

Teaching Experience
*Spring 2015—, Government Information, University of Illinois Graduate School of Library & Information Science*
  - Teach semester-long course covering all aspects of government information to graduate students. Synchronous distance education course.

*Spring 2015—, Empirical Legal Research, Yale Law School*
  - Co-teach one-credit introduction to methods and sources for empirical legal research.

*Spring 2007—2008, Advanced Legal Research, University of Colorado Law School*
  - Teach semester-long two credit course in advanced legal research methods and sources.

*Fall 2006—2007, Basic Legal Research, University of Colorado Law School*
  - Teach 170 first-year law students the basics of legal research in seven sessions of legal skills course. Podcast available at http://www.colorado.edu/law/lawlib/howto/.

*Spring 2002—Spring 2004, Basic Legal Research & Advanced Legal Research, Yale Law School*
  - Teach small groups of students basic skills, work with other librarians to teach advanced research course.
**Selected Publications**


Scott Matheson, *New Data Mining Technique May Bring Security Concerns to eGov Initiatives*, 34 DTTP: Documents to the People 23 (Spring, 2006).


**Selected Presentations**

Legal Information presentation at Government Information in the 21st Century Train the Trainer Meeting, University of Colorado Boulder (June, 2007)(IMLS grant-funded).


**Selected Professional Activities**
- Government Documents Special Interest Section, chair (2005—2006).
- Annual Meeting Local Arrangements Committee (2013)
- SNELLA Chapter, member (2011—present).

Depository Library Council to the Public Printer of the United States (2014—2017, chair 2017)

BERNARD F. REILLY

PROFESSIONAL HISTORY

2001 - Present   President, Center for Research Libraries / Global Resources Network, Chicago Illinois

- As the chief executive officer, plans and directs all activities, programs and services of the organization, a consortium of academic and independent research libraries in the U.S. and Canada. CRL identifies and preserves critical source materials and documentary evidence from all world regions, to support advanced academic and public policy research. Collections include archives, serials, newspapers, government documents, and other primary source materials, and over fourteen million digital files. CRL also provides venues for member library sharing of information and expertise on digital resources and data, and negotiates terms for access to those resources with publishers and vendors.

1997 - 2001   Director of Research and Access, Chicago History Museum, Chicago, Illinois

- Headed the 25-30 person administrative and curatorial unit responsible for acquisition, public service, cataloging, and electronic dissemination of the Museum’s research holdings of over nineteen million items.
- Integrated the operations and services of five separate curatorial departments: Archives; Photography; Library; Broadcast Archives; and Architecture.
- Planned and directed collection digitization and automation of access to archives, photographs, manuscripts, audio-recordings, films, and architectural drawings.
- Negotiated and managed partnerships with universities, research libraries, broadcast media, and commercial organizations for creation of on-line and broadcast productions such as websites, digital collections, and television and radio programs.
- Managed the licensing of the Museum's collection materials for educational, commercial, and public interest uses.
- Raised funds for digitization and acquisition of collections from private and federal funding sources (Andrew W. Mellon Foundation, Chicago Community Trust, Richard Driehaus Foundation, Joyce Foundation, and the NEH).

- Planned and directed acquisition, preservation, publication, and other curatorial programs and activities relating to the Library’s collections of over fourteen million photographs, prints and drawings, illustrated books, architectural records, and other pictorial holdings.
- Worked with National Digital Library planners to select, digitize and disseminate original art and documentary collections via the Web, and with the Library’s general counsel to address new policy, IP and legal issues arising in connection with those activities.
- Directed the division’s curatorial staff of twelve, who were responsible for acquiring, interpreting, documenting, and disseminating collections in the following areas: Master Prints and Drawings; Architecture, Design and Engineering; Historical Prints and Drawings; Master Photographs; and Documentary Photographs.
- Planned, proposed and secured special congressional funding for preserving the monumental photographic negatives archives of the Farm Security Administration - Office of War Information.
- Negotiated major gifts and purchases of archives of prints, drawings and photographs from private collectors, dealers, artists, and artists’ estates.


- Was responsible for the acquisition, preservation, exhibition and publication of the Library’s historical and documentary prints and drawings collections.
- Solicited donation of private funds and endowments for developing those collections.

**EDUCATION**

*Villanova University*  B.A. Liberal Arts, English and German literature concentration, June 1972

*Bryn Mawr College*  M.A. History of Art, June 1974
Katherine Skinner  
102 Cypress Street, Greensboro, NC 27405  
404 783 2534; katherine@educopia.org

Education
- Ph.D. Emory University, American Studies (Concentration in Sociology), 2005
- B.A. University of North Carolina at Chapel Hill, Psychology, Highest Honors, 1996

Work Experience
Executive Director, Educopia Institute (2006-present)
- Plan, coordinate, and lead the operations of the Educopia Institute; Implement and direct the Educopia Institute’s programs and projects (e.g., MetaArchive Cooperative, Educopia Research, BitCurator Consortium, and the Library Publishing Coalition)

Digital Projects Librarian: Emory University (2007-2009)
Digital Programs Team Leader: Emory University (2006-2007)
Scholarly Communications Analyst: Emory University (2004-2005)
Project Manager: MetaScholar.org, Emory University (2002-2004)
Graduate Fellow: Smithsonian Center for Folklife and Cultural Heritage (2000)

Selected Publications
- “Here Today, Gone Within a Month: The Fleeting Life of Digital News.” (with Martin Halbert, Marc Wilson, and Frederick Zarndt). In IFLA World Library and Information Congress Proceedings, 82nd IFLA General Conference and Assembly, Columbus, Ohio, 2016.
- Matt Schultz, Katherine Skinner, and Nick Krabbenhoeft (Eds.). Guidance Documents for Lifecycle Management of ETDs (Educopia, 2014)
Selected Presentations/Workshops

- Keynote: “Moving the Needle” (Charleston, SC, Charleston Conference, November 2015).
- Keynote: “Moving the Needle: From Innovation to Impact” (Knoxville, TN, JCDL, June 2015).
- Keynote: “Game Change: How little decisions add up to big impact” (Boston, MA, Digital Preservation Management Workshop, June 2015).
- “Dodging the Memory Hole: Taking action in a critical moment” (Charlotte, NC, Dodging the Memory Hole II, May 2015).
- Program Co-Chair (with Cal Lee): BitCurator Users Forum 2015. (Chapel Hill, NC, January 2015).
- Keynote/Closing Session: “Jump In: Taking Action in a Critical Moment.” (Columbia, Missouri, Dodging the Memory Hole, November 2014)
- Keynote: “Critical Moments: Chance, Choice, and Change in the Library Field.” (Springfield, Illinois, ILEAD USA, September 2014)
- “Communities as a Conduit to Content”. IMLS Funding Priorities 2014 (New York, April 2014)
- “Action and Alignment: Using Collaborative Networks to Support Scholarly Communications”. (Chapel Hill, NC, CRADLE, April 2014)

Selected Project Activity

- PI: Identifying Continuing Opportunities for National Collaboration (2012-2013), Library of Congress NDIIPP.
Summary: Marie Waltz is a Librarian with over twenty years of experience in libraries. A versatile, problem solving professional with experience in libraries ranging in size from small private libraries to a medium sized public law library and a national consortium. Specific experience and expertise in the following areas:

- Preservation
- Shared Print Archives
- Serials Cataloging
- Business and legal Research
- Development of taxonomies
- Project Management
- Access Services including Interlibrary Loan
- Writing policies and procedures
- Information literacy education
- Development of taxonomies

Professional Experience
Center for Research Libraries, Special Projects Librarian,
Chicago, IL
Dates: 2002-Current
The Center for Research Libraries is the largest consortium for academic libraries in the United States and Canada. Job duties are related to CRL Preservation activities. These include:
  - Participated in development of ISO 16363 standard
  - Managed auditing and certification of five digital repositories
  - Research and write on digital and print repositories of interest to CRL members
  - Participate in activities related to Cooperative Print Archiving programs at CRL.
  - Plan ALA Print Archive Network (PAN) ALA meetings
  - Other duties as assigned

Concordia University, Reference Librarian,
River Forest, IL
Dates: 2002-2003
Concordia University is a small Lutheran College in the Chicago suburbs.
  - Provided reference assistance to Concordia University students and staff
  - Researched and wrote bibliographies and other handouts for students
  - Created Web pages
  - Led workshops on library resources for Concordia students

Quaker Oats Information Center, Information Analyst
Chicago, IL
Date: 1999-2002
The Quaker Oats Company was a publicly held company focused on the sales of foods and beverages. It was purchase by PepsiCo in 2001. Co-managed a corporate library
  - Utilized a variety of online and print tools for researching information questions
  - Created and maintained Information Center Web pages
  - Planned and taught Internet training classes
  - Produced a bi-weekly new products newsletter
  - Cataloged new books as they came into the library using EOS cataloging system

San Diego County Public Law Library. Head of Access Services,
San Diego, CA
Dates: 1987-1992
The San Diego County Public Law Library serves the general public and legal community of San Diego County. Responsible for all aspects of Circulation, Document Delivery, and ILL
  - Hired, trained and evaluated staff
  - Wrote an annual budget and an annual report of activities in the department
Produced a completed procedures manual and a
Wrote and analyzed a survey of library patrons

Publications:


Education
MLS Library and Information Science, December 1998 Indiana University, Bloomington, IN.
BA Liberal Arts, June 1987 St. Johns College, Santa Fe, NM.
Other Certifications: Certificate Non-Profit Management, December 2013 University of Illinois, Chicago, IL
EMPLOYMENT

Associate Professor and Graduate Chair, Department of Germanic Languages and Literatures; Affiliated Faculty in the Department of English and the Program in Comparative Literature University of Pennsylvania, Philadelphia, Pennsylvania, 2011-present.

Founding Director, Penn Program in the Environmental Humanities, 2014-present.

Topic Director, Penn Humanities Forum, Year on Translation, 2016-2017.

Assistant Professor, Department of Germanic Languages and Literatures, University of Pennsylvania, Philadelphia, Pennsylvania, 2003-2011.

EDUCATION

University of Minnesota, Minneapolis, Minnesota. Ph.D., Germanic Languages and Literatures, December 2002.


FELLOWSHIPS, GRANTS, AND HONORS


University Research Foundation Grant, University of Pennsylvania, spring 2016.

School of Arts and Sciences Grant for Conference Support, University of Pennsylvania, spring 2016.

Fellow, Center for Advanced Studies Fellow, Ludwig Maximilians Universität, Munich, Germany, spring-summer 2015.

Guest Fellow, Rachel Carson Center for the Environment and Society, Deutsches Museum and Ludwig Maximilians Universität, Munich, Germany, spring-summer 2015.

Green Campus Partnership, Start-up Grant for the Program in Environmental Humanities, University of Pennsylvania, summer 2014-.

Center for Teaching and Learning Faculty Seminar for Developing Large Lecture Courses, University of Pennsylvania, fall 2012-spring 2013.

German Academic Exchange Service (DAAD) Matching Grant for Conference Support, fall 2012.

Research Opportunity Grant, University of Pennsylvania, summer 2012.

Faculty Fellow in the Program Integrating Sustainability across the Curriculum (ISAC), University of Pennsylvania, summer 2012.

University Research Foundation Grant, University of Pennsylvania, spring 2012.

School of Arts and Sciences Grant for Conference Support, University of
Pennsylvania, spring 2012.
Conference Grant Ständige Arbeitsgruppe Deutsch als Fremdsprache (StADaF / Standing Committee for German as a Foreign Language), German Academic Exchange Service (DAAD), spring 2011.
University Research Foundation Grant, University of Pennsylvania, spring 2011.
Fritz Thyssen Postdoctoral Fellowship at the Francke Foundations, Halle, Germany, fall 2010.
Gest Fellowship for Study in the Quaker Collection, Haverford College, summer 2010.
Herzog Ernst Postdoctoral Fellowship from the Fritz Thyssen Foundation, Gotha Research Library—University of Erfurt, Germany, summer 2005.
Summer Research Award for Junior Faculty, Trustees’ Council of Penn Women, University of Pennsylvania, 2005.
Doctoral Dissertation Fellowship (Findelstipendium), Herzog August Bibliothek (German National Library, 1500-1800), Wolfenbüttel, Germany, 2002.
Travel Grant, American Friends of the Herzog August Bibliothek, Wolfenbüttel, Germany, 2002.
Summer Research Grant, Department of German, Scandinavian & Dutch, University of Minnesota, Minneapolis, Minnesota, 2002.
Doctoral Dissertation Small Grant, Department of German, Scandinavian & Dutch, University of Minnesota, Minneapolis, Minnesota, 2001.
Doctoral Dissertation Fellowship, Graduate School, University of Minnesota, Minneapolis, Minnesota, 2000-01.
Recognition for Outstanding Teaching, Department of German, Scandinavian & Dutch, University of Minnesota, Minneapolis, Minnesota, 1998 and 1999.
Val Björnsson Memorial Scholarship, University of Iceland, Reykjavik, Iceland, 1996-97.
Elizabeth Folsom Rathert Scholarship, Department of German, Scandinavian & Dutch, University of Minnesota, Minneapolis, Minnesota, 1994-95.

**PUBLICATIONS**

**Book**


**Edited Collection**