I.   Project Justification

San José State University (SJSU) School of Information and Simmons University School of Library Information Science propose **a one-year planning grant entitled iLead: Preparing Tomorrow's Library Leaders**. Our project will address LB21 Goal l, *Recruit, train, develop, and retain a diverse workforce of library and archives professionals,* Objective 1.3, *Develop training for library and archives workforces*. In collaboration with national, state, and local partners, iLead will help inform future LIS leaders by defining a leadership program with an equity, diversity, and inclusion (EDI) focus that identifies required core competencies for workforce development. Harnessing the expertise of library leaders, organizations, and LIS practitioners, iLead will be designed by professional LIS educators, developed by online learning experts and instructional designers, and prepared for future implementation as a free, online professional development opportunity for LIS workers, leaders, and libraries, especially those who do not have or plan to pursue an MLIS degree.

Libraries and information organizations face increasing and rapidly evolving expectations for supporting EDI priorities within their communities, and recent social and health issues ([CBPP](#), 2022) have raised glaring evidence of gaps within accessibility and inclusion. iLead will help fill these gaps by convening a diverse group of practitioners, educators, and training experts to conduct a comprehensive needs assessment and to identify core competencies, gaps in current leadership formation, and appropriate pathways for closing those gaps.

We anticipate iLead will converge on at least two independent and field-tested training and professional development learning opportunities—a free Massive Open Online Course (MOOC) and a graduate certificate offered through the SJSU School of Information, whose courses will also be made available to other MLIS programs and students through the [Web-based Information Science Education (WISE) consortium](#). A third option iLead will explore is a more traditional in-person residency training programs, but this pathway will be independently decided upon by each state and would require no funding through iLead. Ultimately, these planning activities are closely aligned to LB21 Goal 1, Objective 3.1 and will advance the three primary goals of iLead to: 1) Cultivate an accessible, flexible, cost effective, and impactful library leadership program that is informed by LIS-practitioners' and educators' experience; 2) Strengthen equity, diversity, and inclusion in both the LIS workforce and within the communities that workforce supports; and 3) Establish a better-prepared internal pipeline for tomorrow's library leaders. The total funding requested for the iLead planning project is $148,559.00. This planning grant is intended to serve as the analysis and design phase that will provide a well-researched and validated curriculum and plan for a future implementation grant to fully execute iLead.

Need Statement

As the world settles into a post-pandemic future, libraries and library leaders face a host of complex challenges involving new patterns of life, work, and information access. Such evolving dynamics increasingly demand new expectations for libraries and information organizations and staff, especially as one of the central priorities within our rebuilding society is an increased focus on equity, diversity, and inclusion (EDI). For example, the revised 2022 ALA accreditation standards place a significant priority on EDI to ensure a systematic place in LIS professional education. As ALA states, *equity* "takes difference into account to ensure a fair process and, ultimately, a fair outcome" ([ALA](#), 2022); *diversity* is "...recognizing, valuing, and embracing the uniqueness of each individual" ([ALA](#), 2022); and *inclusion* is creating "an environment in which all individuals are treated fairly and respectfully; are valued for their distinctive skills, experiences, and perspectives; have equal access to resources and opportunities; and can contribute fully to the organization's success" ([ALA](#), 2022). Professional associations indeed advocate for EDI training for leaders, and the Medical Library Association's Diversity Equity and Inclusion Committee released a report in 2022 that focused on fostering diverse

> **iLead: Cultivating future LIS professionals empowered with an EDI lens.**
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> By convening a diverse group of practitioners, educators, and training experts to conduct a comprehensive needs assessment and to identify core competencies, gaps in current leadership formation, and appropriate pathways for closing those gaps, we will:
>
> **1)** Cultivate an accessible, flexible, cost effective, and impactful library leadership program that is informed by LIS-practitioner and educator experience
>
> **2)** Strengthen equity, diversity, and inclusion in both the LIS workforce and within the communities that workforce supports
>
> **3)** Establish a better-prepared internal pipeline for tomorrow's library leaders

San José State University School of Information and Simmons University School of Library and Information Science

leadership in libraries[1]. While this report differs from directly fostering EDI within libraries, the committee developed a bibliography and resource lists that promotes equity, diversity, and inclusion in library leadership. Such efforts are valuable, but while it is easy to support the ideals of EDI, it is much more difficult to provide education about and apply these complex constructs, especially within the different personal, educational, socioeconomic, and work contexts coinciding with ethnic and cultural differences and worldviews.

Such discussions illustrate that the need for mindful EDI leadership in libraries exists, but problematically, there are currently *no standardized certificate programs or systematic, long-term training programs* available within the information professions. Among existing LIS programs, those educational and proprietary organizations that do offer EDI leadership certifications hold no common standards. Similarly, there are no EDI certificates evidenced among the ALA-accredited LIS programs that offer continuing education or post-master's certificates in Management and Administration[2]. Some of these programs do offer a DIY specialization for post-master's students, and at least one MLIS program offers a MLIS Track: Information Equity, Diverse Communities, and Critical Librarianship[3]; however, while beneficial for the same target groups as iLead, these programs are offered at the standard tuition rates of the university, which presents a barrier to entry for many among our target audience. Several organizations—such as Library Journal[4]—have provided one-time workshops for equity-centered leadership, but again these trainings are paid for out-of-pocket or by the employer, and these stand-alone workshops do not ensure a systematic pedagogical approach to teach EDI leadership. Accordingly, the iLead Program will address the profession's need for strong leadership with an EDI-lens in a pedagogically sound, virtually accessible, and tuition-free environment.

Target Group & Broader Beneficiaries

There are three target groups for iLead: 1) LIS professionals, 2) MLIS graduate students, and 3) LIS organizations that seek to help nurture their future leaders with the core competencies and the focus on EDI needed to help them flourish. Following a user-centered design (UCD) approach, potential employers and participating state libraries will partner with San Jose State's and Simmons' Schools of Information (iSchools) to identify current needs and core competencies and to design a curriculum that addresses the desired competencies in a systematic, mastery-learning focused way. This process will include close consultation with our national and state advisory committees—detailed in our Work Plan. Briefly, the national advisory committee will be composed of representatives from national professional associations, many of which are NALCo (National Associations of Librarians of Color) professional organizations. The state-level advisory committee will be composed of at least five states, each including their state libraries, library associations, and representatives from one urban and one rural public library. These dual advisory committees have been created to ensure that the proposed competencies and learning outcomes are practitioner-driven and EDI-focused and adequately address the current and future needs of emerging LIS leaders and their organizations.

The ultimate and broader beneficiaries of iLead will be LIS organizations, their respective workforces, and the communities they serve. iLead will build a high-quality, contemporary, and authentic learning experience that is free, and openly accessible to all LIS professionals, thereby removing traditional barriers such as cost, time, and access frequently associated with pursuing the MLIS degree. Those who complete the MOOC will receive a certificate of completion and be empowered with an EDI-focused set of core competencies implementable in their day-to-day work. Such outcomes will spread the impacts of iLead from participants to peers and patrons, all of whom will benefit from increased equity, diversity, and inclusion within LIS institutions.

Innovations and Synergies

Collectively, iLead will stand in contrast to other LIS leadership programs—ALA Leadership Institute, PaLA Academy of Leadership Studies (PALS), the Dominican University Certificate in Executive Library Leadership, and the University of Rhode Island MLIS Track: Information Equity, Diverse Communities, and Critical Leadership—because iLead will be sourced, designed, and developed by professional educators in our national and statewide coalitions to ensure close alignment between what the field needs and what iLead offers. Thus, iLead will enhance ALA CORE's leadership

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[1] https://www.mlanet.org/blog/a-work-in-progress-strategies-to-foster-diverse-leadership-in-libraries

[2] https://www.ala.org/CFApps/lisdir/index.cfm

[3] https://web.uri.edu/online/programs/graduate/master-of-library-and-information-studies/curriculum/mlis-track-information-equity-diverse-communities-and-critical-leadership/

[4] https://www.libraryjournal.com/event/equity-centered-leader-sep-2022

competencies in our post-pandemic, disrupted society and world by infusing concepts and principles of equity, diversity, and inclusion into the free curriculum.

We especially highlight three differentiators of our proposed iLead program:

1) By convening national and statewide coalitions including many NALCo (National Associations of Librarians of Color) professional organizations, state libraries, library employers, global library-skills providers, and LIS educators, iLead will deliver a current, diverse, and systematic approach to the design of a needs-based curriculum;

2) The two iSchools leading this program will ensure iLead possesses the resources to make its professionally designed curriculum a high quality yet free and openly accessible online learning opportunity. Furthermore, through the creation of a post-baccalaureate certificate, iLead will be sustained into the future as part of an established curriculum; and

3) iLead's collaborator network will enable the program to be tested and disseminated widely through a broad network of partners as well as through the existing WISE program—which allows LIS students from other MLIS programs to pursue graduate coursework towards the iLead post bachelor's certificate.

Combined, these features mean iLead will design a well-researched and tested curricular plan and course management system overseen by two of the largest iSchools in the field and poised to deliver an authentic, freely accessible, and far-reaching supplement to enrich existing training programs and deepen LIS professionals' core competencies via an EDI-lens.

II.   Project Work Plan

To deliver on iLead's vision, this planning grant will combine a software-aided skills analysis—performed in part via Skilltype, which aggregates work competencies from existing library positions and job descriptions worldwide—with ALA CORE's 14 foundational competencies to found our initial curriculum development. Next, these competencies will be reviewed and vetted by our advisory committees and participating partners to help further design and plan a holistic and needs-based curriculum that will be packaged and delivered to LIS professionals. Our proposed one-year planning collaboration includes San Jose State's and Simmons University's iSchools; the state libraries of California, Washington, and Nevada (representing the West Coast), Massachusetts and North Carolina (representing the East Coast), and likely Illinois (representing the Midwest; Chicago Public Library has committed); each state's library associations; and one urban and one rural public library partner from each state. iLead's national partners include the American Library Association (ALA) and its Divisions, the Association of College & Research Libraries (ACRL), Core, United for Libraries, and its Office for Diversity, Literacy and Outreach Services (ODLOS), the Association of Rural and Small Libraries (ARSL), the Black Caucus American Library Association (BCALA), REFORMA, the Asian Pacific American Librarians Association (APALA), the Chinese American Library Association (CALA), and California Librarians Black Caucus (CLBC). Such diversity within our team and advisory ranks will provide an essential and authentic foundation by including diverse perspectives, lived experiences, and discussion that are essential to actively cultivating leaders prepared to address the complex issues facing the field today and into the future. Consequently, the curriculum that will be designed will use and be built from an EDI lens and will yield at least two different levels of training and learning opportunities. While we will allow the collaboration to evolve these training formats, we will build a free and openly accessible MOOC and a post-baccalaureate graduate certificate–with an in-person, independently funded training program also under consideration in some states.

Tasks and Activities

As illustrated in Figure 1, the iLead planning grant will be implemented in three phases: Phase 1 will coordinate the effort involved in Phases 2 and 3, which will include an iterative feedback loop to optimize the production of this iLead's curriculum. We have narratively described our activities here, but we will use this logic model to coordinate the activities and monitor completion. Organizationally, the steering committee—who will oversee broad administration and maintain the iLead's momentum—will be led by Co-Directors Drs. Chow and Erdelez, and the day-to-day operations, research, and project and staff oversight will be performed by two seasoned Co-Project Managers, Sue Alman and Martín Gómez. Our Co-Investigators Aguiñaga and Davis will interface between committees, managers, and staff, and will lend their expertise to the instructional designers producing the curriculum. Such a
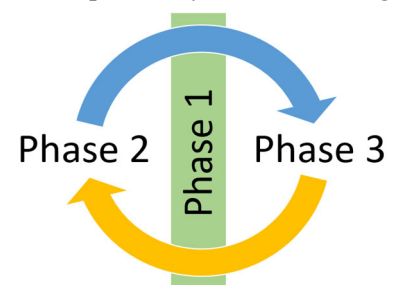
Figure 1: We envision Phase 1's activities will cross-cut Phases 2 and 3, which will occur iteratively as we hone the iLead curriculum and resources.

flexible structure in our funded collaborators enables iLead to monitor project outcomes against concrete metrics while embedding enough flexibility to allow our planning grant to adapt to the needs and activities recommended by our stakeholders.

In terms of stakeholders, as discussed above, iLead will involve two advisory committees, one at the state and one at the national level, and these advisors will iterate with the project and represent their organizations and disciplines by reviewing the core competencies identified and suggesting revisions/additions, as appropriate. Finally, two instructional designers will be hired, one focused on assembling the curriculum and the other on designing the MOOC prototype itself.

Phase 1 - Coordination: Organize and coordinate the project team and stakeholders to represent broad perspectives and to facilitate the efficient accomplishment of the goals of the project.
This phase includes activities that span the whole year, but we present them sequentially to clarify this phase's targets.

Task 1: Convene project steering committee and finalize work plan with stakeholder input. (Monthly)
Initially, the steering committee—our planning and operational team—will meet to finalize all project logistics, including deadlines, workflow, needed inputs and expected outputs. This task will also finalize the steering committee's convening schedule to strengthen our project's progress metrics. Members will include the two iSchools' leaders/iLead's Co-Directors, Drs. Chow and Erdelez; two members of the iSchools' respective faculty/our Co-Investigators, Drs. Aguiñaga and Davis; the two Co-Project Managers, Dr. Alman and Mr. Gomez; and other relevant operational staff, such as a social media coordinator, student assistants, instructional designers, and other invited faculty and guests needed to carry out the project and our effective and efficient operation (see budget and Task 3). We will meet via Zoom weekly and as needed. Both instructional designers will also be hired. San Jose faculty will travel to Simmons for a two-day kick-off and planning meeting (see budget). **Task 2: Finalize state and national advisory committee. (9/23-10/23).** To ensure iLead's broad, diverse perspective and to clarify/define the roles and responsibilities for the state and national advisory committees, this task will confirm and integrate the committee members and representatives from diverse organizations at state and national levels. These stakeholders will serve in an advisory capacity only and most of their work will be asynchronous, including such activities as reviewing core competencies and the curriculum, and providing input based on gaps and recommended resources, activities, and other leadership and EDI perspectives/gaps to be addressed within the MOOC. Both committees are present to ensure expert and broad perspectives from LIS professionals, leaders, organizations, and their constituencies—at both the state and national level—are included in the iLead curriculum.

Phase 2 - Curriculum: Work with broader stakeholders to define program needs and to draft iLead's preliminary curriculum outline.
Library leaders, organizations, and practitioners will work alongside LIS teaching and research faculty as part of the project steering committee and state and national advisory committees. Phase 2 outputs will feed into Phase 3 such that the curriculum design and testing will proceed iteratively.

Task 3: Identify gaps and synergies in existing leadership and EDI programs. (9/23-11/23). To optimize investments in iLead, the project steering committee's Co-Directors, Co-Investigators, and Co-Project Managers will continue researching existing leadership and EDI programs to identify gaps and synergies. This process (facilitated during the meetings described in Task 1) will include: 1) Research and build-in aspects of previous library leadership initiatives, 2) Identify the traits, characteristics of previous library leadership programs, 3) Collaborate and discuss with the field about desired leadership qualities and EDI core competencies and best practices needed in the profession (e.g., interviews, focus groups, surveys, literature reviews, etc.), 4) Build on the CORE competencies to fill in the gaps. We will also learn from the experience of California's Developing Leaders in California Libraries project, which has been supported by the California State Library for the past seven years. **Task 4: Identify leadership and EDI core competencies (10/23-12/23).** ALA CORE has a list of 14 leadership and management competencies that will be used in the development of the curriculum.[5] We will also learn from other North American-based programs, such as the Canadian-based program, LLEAD (libraryleadership.org). Lessons about what went well, what did not go well, and how to build a strong first-draft of the plan will be of especial note. To understand the strengths and opportunities from previous leadership development programs, we will do a comprehensive literature review and environmental scan to trace the history of prior library leadership development programs—e.g., SnowBird, Executive Leadership Institute (Urban Libraries Council), Senior Fellows Program (UCLA), ARL—as well as to research leadership competencies from other industries (museums,

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[5] https://www.ala.org/core/continuing-education/leadership-and-management-competencies

business, social work). Such parallel programs will enable our curriculum to advance from a strong foundation.

Task 5: Convene state advisory committee on Zoom to consult on identified/emerging needs (10/23 & quarterly thereafter). Ideally, at least four organizations will represent each state: the state library, the state library association, an urban public library and a rural public library (with these latter two prioritizing geographical diversity as well). Academic and school libraries may also be added in the future. The text box on the right identifies some of our current partners, with more in discussions at the writing of this proposal—and others being invited during Task 2 (See full list here). The state advisory committee will help review proposed core competencies and the curriculum, identify gaps, provide additional resources and activities, and help recruit participants for interviews, focus groups, and surveys. The State Library of Washington has already verbally pledged to recognize the iLead

> **iLead's Example Participants**
> One differentiator for iLead is our broad and committed stakeholder list. A sample of our confirmed advisors include:
> → American Library Association (ALA)
> → Black Caucus ALA
> → REFORMA
> → Asian Pacific American Library Association
> → ALA's Core
> → ALA's United for Libraries
> → ALA's Office for Diversity, Literacy and Outreach Services (ALA-ODLOS)
> → State Library of California and San Francisco Public Library, CA
> → State Library of Nevada and Las Vegas/Clark County and Lincoln County libraries, NV
> → State Library of Washington and King County and Mid-Columbia libraries, WA
> → State Library Commission of MA (pending) and Boston Public Library, MA
> → State Library of North Carolina and Greensboro Public Library, NC
> → State Library of Illinois (pending) and Chicago Public Library, IL
> → Association of Rural and Small Libraries (ARSL)

certificate once it goes through the appropriate review and approval process and also to offer and fund its own in-person residency as a companion to the iLead MOOC/post-baccalaureate degree. We expect that the iLead MOOC curriculum may require some state-level customization, so our 100% digital MOOC will be able to be copied in its entirety, duplicated, and customized based on the needs of each state. **Task 6: Convene national advisory committee to consult on identified/emerging needs (10/23 & 4/24).** The project will also be guided by a national advisory board composed of representatives from a diverse group of participating national library associations. In addition to the participants listed at the beginning of our work plan, we are also reaching out to the Public Library Association (PLA) and the American Indian Library Association (AILA), with others likely to be added upon the success of this proposal (see Task 2). Similar to the state-level advisory committee, each representative and organization will have a seat at the table to advise iLead on core competencies, curriculum, gaps and opportunities, etc. and also will assist in data collection as applicable. Individual organizations' work will largely be asynchronous, but the full committee will meet twice a year and travel funds will be made available to assist those who may not have the funds to attend either ALA LibLearnX or ALA annual, as iLead will be holding informal meetings and social gathering at both since many of our members attend these events as part of their regular professional activities.

Phase 3 - Production: Design iLead curriculum and MOOC Prototype to prepare for future implementation.
In consultation with iLead's broad coalition, iLead's faculty and two instructional designers will develop and test the preliminary curriculum using a formal instructional design process: Analyze, Design, Develop, Implement, and Evaluate (ADDIE; Instructional Design, 2023). We will situate this effort within a formal user-centered design (UCD) and user experience (UX) process, that places user priorities and user experience at the forefront of all design and development decisions; furthermore, this systematic process follows a rapid prototyping design and development lifecycle that allows for constant feedback, testing, and redesign as the iLead curriculum and MOOC designs evolve. One instructional designer will be responsible for designing the curriculum and another instructional designer will be responsible for designing the MOOC prototype to maximize usability and user experience. Phase 3 will also entail partner- and mentor-engagement and grant planning for a FY24 IMLS LB21 implementation grant.

Task 7: Design curriculum outline with learning outcomes (11/23-2/24). The curricular design process will involve several layers of analysis and refinement, which we formulate as subtasks 7.1 and 7.2 and which will complement the activities of Phase 2. At a high level, the curricular design will start with ALA Core's 14 foundational competencies, and we will supplement and cross-reference these with the output of Phase 2 and with the skills and competencies of existing

LIS jobs–this latter process will leverage the software Skilltype, a tool that aggregates needs and audits skills to help organizations better train employees. As Phase 2 emphasizes defining core competencies relevant to equity, diversity, and inclusion, we will break down the identified and vetted core competencies into measurable learning outcomes, required content to be taught, and the requisite skills and behaviors that collectively make up each competency. iLead's Co-PIs, Co-Is, and Co-Project Managers will help the instructional designers assemble and finalize the curriculum taught in the MOOC through rigorous rapid prototyping; this prototyping involves increasingly tighter design, testing, and refinement cycles that iterate 7.1 and 7.2 (e.g., designs are shown to potential users, users try to accomplish specific tasks using wireframes, IA maps, and storyboards, and feedback is collected, studied, reported, and used to refine the curriculum and MOOC interface, etc.). Outcomes of these activities will feed back to Phase 2 for stakeholder perspectives. **Task 7.1. Design the curriculum**: Building out of Tasks 3 & 4 and using a standard backward-design curriculum development process, one instructional designer will define the end competencies that students/learners of the MOOC should be able to apply at the end of instruction and then map and break these competencies down to student learning outcomes, associated content and activities, and assessments. As much of the needs-identification activities will feed from Phase 2, this designer will augment knowledge via a comprehensive review of existing resources and training programs from Core's 14 foundational competencies and any relevant additional research/data collection. As the curriculum undergoes iterative review via Phase 2, this subtask will yield a comprehensive curriculum and course map that is ready for development and future implementation. Adding to, and refining, the curriculum based on state specific or specific types of library needs will also be available. **Task 7.2. Design the MOOC and instructional technology requirements**: In parallel with 7.1, a second instructional designer will build the user interface and the associated instructional and technical requirements of the MOOC to effectively deliver the curriculum, assessments, and other instructional functionality–i.e., requirements to earn a certificate of completion, etc. This effort will start with the current Research Data Management Academy's (RDMLA) continued education MOOC, sponsored by the RDMLA network and built by Simmons University, to which iLead's second instructional designer will add the foundation and additional processes, systems, and requirements based on the designed curriculum and intended user experience. RDMLA is sponsored by a collaboration between LIS academic programs, academic health sciences and research libraries, and Elsevier and serves as, "a global, free online professional development program for librarians, information professionals, or other professionals who work in a research-intensive environment" (RDMLA website). Outcomes from 7.2 will feed into 7.1, 8, and Phase 2.

Task 8: Develop iLead MOOC wireframe and specifications (1/24-8/24). Using the Simmons-designed and -developed Research Data Management Librarian Academy (RDMLA) MOOC, the overall goals, curriculum, and iLead interface and functional design will be proposed in a design wireframe, along with suggested technical requirements and specifications. The MOOC will be designed using a user-centered design process with an emphasis on gathering the information priorities and user preferences from prospective users starting at the very beginning of the MOOC design and development process. Procedurally, this process means interviews, focus groups, and surveys will be conducted, and the results will be used to develop a user/task matrix that lists information priorities by user group. The next step will be to develop a storyboard and preliminary mockups followed by an initial information architecture and user interface that is documented and shared as a wireframe concept document that will include technical specifications such as MOOC software, authentication and user tracking system, grading, progress documentation, and award of a certificate of completion. While the instructional designer will build the prototypes, the mockups will be designed and cultivated by the entire project team. These designs will be tested by prospective users, and feedback and identified issues will be refined in the overall MOOC design (e.g., wording and position of menu options, etc.). The iLead MOOC will remain in the design and concept phase in preparation for future development and implementation. The curriculum, wireframe, and design specifications for the proposed MOOC will collectively serve as a detailed roadmap ready for future development and implementation.

Task 9: Identify and finalize strategic partners for implementation (2/24-7/24). To transition from this planning grant to a full implementation grant (to be proposed to IMLS LB21 in FY24), we will identify and recruit the final members of the national and state-level advisory committee and strategic partners (e.g., state libraries, specific library branches in each state, and additional LIS networks) for large-scale implementation. By embedding this partner-engagement step in this planning proposal, the validity of our curriculum and MOOC design will be increased, and we will be better able to rapidly implement iLead in the future. San Jose State will host a two-day planning meeting. **Task 10: Identify and finalize potential coaches and mentors for implementation (2/24-7/24).** The Co-Project Managers—in consultation with the rest of the steering committee—will locate individuals working in the library and information profession with expertise in mentorship; the ALA Mentoring Resources list will support these efforts to identify potential coaches and

San José State University School of Information and Simmons University School of Library and Information Science mentors.[6] Mentors from each participating state and various types of libraries will be identified in preparation for submitting an implementation grant. This will be an important output of the iLead planning grant—to identify how many mentors are needed, who they will be, how they will operate, and how much their involvement will cost. **Task 11: Prepare implementation grant proposal (6/24-8/24).** Based on findings from the year of planning, an LB21 implementation grant proposal will be developed by iLead in collaboration with the Co-PIs and the state and national advisory committees to co-design the future implementation of the iLead program as designed, envisioned, and proposed. **Task 12: Submit planning activities findings report (8/24).** Our formal report will be submitted, and current findings will be widely shared through the iLead network, at state and national conferences (e.g., each state's annual association conferences, LibLearnX, ALA annual, PLA, etc.), and through publication.

Management Plan

The LB21 program uses four variables to help determine how successful a project is: effectiveness, efficiency, quality, and timeliness. As illustrated in our Performance Measurement Plan, the project has been organized to ensure all four areas are managed at micro- and macro-levels. This project will include oversight by an experienced and veteran project steering committee (who will initially meet weekly via Zoom and more infrequently in the future, as needed), a state level advisory committee (meeting quarterly on Zoom, as described above), and a national advisory committee (described above and meeting semi-annually); to keep costs down, the national advisory committee's meetings will be scheduled to coincide with meetings at ALA LibLearnX in Baltimore and the annual conference in San Diego. Stakeholder feedback will also be provided by such advisors as the state librarians, library directors, and staff working in our partner libraries, by iSchool faculty and staff, and by practitioners and educators within the general field as well. Such broad welcome will support our EDI goals by tearing down barriers to access that could otherwise self-perpetuate.

Resources

The iLead project involves experts across multiple levels of the planning project: a) two professors each from SJSU (Co-PI Anthony Chow and Co-Investigator José Aguiñaga) and Simmons (Co-PI Sanda Erdelez and Co-Investigator Rebecca Davis); b) an online learning expert and faculty member (Sue Alman) and an academic/public library expert (Martín J. Gómez), who will jointly serve as Co-Project Managers; c) two instructional designers—one focused on assembling the curriculum and one focused on the MOOC prototype; and d) feedback/oversight contributors from a diverse set of LIS professionals (at the project-level, the state-level via state level partners, and the national-level via members representing professional associations). All participating faculty members and Co-PIs/Co-Project Managers are nationally known leaders with decades of experience, expansive professional networks, and memberships to diverse professional organizations.

Co-Project Directors/Co-PIs: **Anthony Chow**, PhD, will serve as Co-Director and Co-PI of iLead. Anthony is a full professor and the Director of San José State University (SJSU)'s School of Information whose doctorate is in instructional design and technology. His areas of expertise include online learning—including MOOC design—instructional design and technology, user experience (UX) and usability, technology integration, EDI research (with a focus on early children's literacy in tribal communities), and leadership and management. He also serves as founder and Project Director for two IMLS funded projects—Reading Nation Waterfall, which is a three-year $1.4 million National Leadership Grant, and Seeking Immortality, which is a digital preservation project with the Northern Cheyenne Tribe of Montana funded by a two-year Native American Enhancement grant. Dr. Chow is also the founder and director of the Library Technology Integration Lab at San Jose State. View his CV in virtual reality. **Sanda Erdelez**, PhD, will serve as Co-Director and Co-PI of iLead. Dr. Erdelez is an interim Dean at the College of Organizational, Computational and Information Sciences at Simmons University. Dr. Erdelez is a former Fulbright Scholar from Croatia and recipient of The Texas Excellence Teaching Award and The ALISE Pratt-Severn Faculty Innovation Award. She is also the chair of the iSchools Organization, and co-chair of ALISE Deans, Directors and Chairs Council. Her research interests include human information behavior, human-computer interaction and usability evaluation in online environments and has received funding from both corporate and government sources, including Dell Inc., SBC Communication, Texas State Government, and NSF. Most recently she has been engaged in development of Research Data Management Librarians' Academy (RDMLA), an online MOOC with more than 6,000 users world-wide. In 2015, Dr. Erdelez received the Outstanding Contribution to Information Behavior Research Award from SIG USE and also became a member of the SIG USE

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[6] https://www.ala.org/educationcareers/mentoring/mentoring_and_recruitment_efforts

San José State University School of Information and Simmons University School of Library and Information Science Academy of Fellows. Both Co-Directors will lead the steering committee and contribute their expertise in online instruction and LIS education to ensure iLead's timely and effective completion.

Additional Co-Investigators: **José Aguiñaga**, PhD, will serve as Co-Investigator of iLead. In 2022, Dr. Aguiñaga joined the School of Information at San José State University (SJSU) as an Assistant Professor. Dr. Aguiñaga's bilingual upbringing is the foundation for his development as an academic librarian and current scholar. His awareness of the disparities that continue in many marginal communities is well-noted in his scholarship to the library science literature. As a first-generation Latino college graduate, Dr. Aguiñaga developed and learned from various academic librarian roles throughout his higher education career. Having firsthand knowledge of what has occurred in the past as he pursued his education pathway makes Dr. Aguiñaga an excellent contributor to the iLead Planning Grant team and a future mentor for iLead participants; **Rebecca Davis**, PhD, will serve as Co-Investigator for iLead. Rebecca is an Assistant Professor in the School of Library and Information Science at Simmons University. Her research areas include marginalized groups and their use of academic library services and resources, diversity in academic libraries, and first-generation graduate students and their information-seeking behaviors, so she brings this knowledge to the grant project. In 2020, she received a Laura Bush 21st Century Library Program grant from the Institute of Library and Museum Services (IMLS) for her *African American Undergraduates' Use of Academic Libraries* project. She is on the advisory board for two IMLS grants and an advisor for two NSF grants, all focusing on areas around EDI. Before joining the faculty at Simmons University, she worked as an Information Services Librarian in the Jennifer Ann Wilson Dental Library at the University of Southern California.

Co-Project Managers: **Sue Alman**, PhD, will serve as Co-Project Manager of iLead. For Sue, leadership and communication are among the top areas of expertise that have been present in each of her professional endeavors, which have spanned a four-decade career in libraries and education. As Co-Project Manager of the iLead project, she will bring a set of organizational skills employed in the LIS programs she directed, including the University of Michigan (Associates Program), University of Pittsburgh (Director of Online Learning), and San Jose State University (Gateway PhD Program and Curriculum Committee Chair). Her skills are further evidenced through engagement in online graduate courses and MOOC development in a variety of areas including management, leadership, emerging technology, and communication. As an early adopter of asynchronous education, she has worked with ITV and multiple LMS platforms and interactive applications to enhance teaching and learning with student cohorts. **Martín J. Gómez**, MLIS, will serve as Co-Project Manager of iLead and has held high profile leadership roles in both academic and public libraries both on the West and East coasts. Martín is President/CEO of MJ Gómez Associates LLC, an independent consulting firm that was created to support the work of libraries and non-profit organizations. Before starting his consulting firm, Martín served as Vice Dean of Libraries at the University of Southern California, General Manager and City Librarian for the Los Angeles Public Library, Executive Director of the Brooklyn Public Library, and Director of the Oakland Public Library. His non-profit experience includes serving as President/CEO of the Urban Libraries Council, and Executive Director of the Friends and Foundation of the San Francisco Public Library. Martín will contribute a wealth of leadership program experience, including stewardship of the Urban Libraries Council's Executive Leadership Institute (ELI) and most recently, the Developing Leaders in California Libraries program for the California Library Association.

In addition, iLead is led by two of the largest iSchools in the field, who both have robust resources, including faculty and staff, student support, potential interns, technology resources, and online teaching and learning expertise. iLead will also informally meet at both LibLearnX and ALA annual conferences and will provide up to six $1,200 travel scholarships for national advisory committee members who may not have the resources to travel to national conferences.

Incorporating Target Group and Advisors
iLead is committed to working closely with its target audience from the very beginning and at all levels of design and development. Such close collaboration will help ensure a clear set of contemporary, relevant, and EDI-focused core competencies are identified by the diverse set of stakeholders representing the target group for this EDI-focused leadership development training. During initial discussions with our partners, each state expressed interest in hands-on participation in helping develop their future leadership and removing the traditional barriers associated with pursuing the MLIS degree: cost, educational background, and access. Thus, the project will be guided by advisors at the project, state, and national level composed of a diverse set of LIS professionals—educators, state librarians, library directors, and librarians from all different types of backgrounds and libraries. iLead is also designed to be flexible, allowing for the curriculum to accommodate differences based on type of library, state and region, and size of library.

Tracking Progress

In accord with the Schedule of Completion, and as described above, the project will utilize a logic model to keep track of day-to-day, month-to-month activities. A logic model is a systematic way of connecting our project goals with the implementation of inputs and the measurement of outputs and outcomes so progress can be tracked at all levels and phases of the project. These inputs and outputs are defined as both activities and the quantitative impact of those activities (e.g., number of modules, number of participants, number of meetings, etc.) as well as the impact of those outputs on longer term outcomes. View our draft logic model here. The project will comply with all reporting requirements using IMLS' electronic grants management system.

Dissemination Plan

Because of iLead's diverse and broad state and national coalition involving many current and future leaders and practitioners of the field, some organic and organizational dissemination and buy-in is built into the project. Each member of the project steering committee and state and national level advisory committees represent at least one LIS organization, and each are likely to also have extensive individual and professional networks. More specifically, one of the natural benefits of our large alliance and partnership network is that iLead will be working with LIS organizations and professionals at different yet aligned levels on the West Coast, East Coast, and Midwest and will include some of the most high-profile, large, and well-known public libraries. Such a strength starts with the national advisory committee, whose members include a diverse set of experts with expertise in EDI and different types of LIS professional environments and libraries. Each represents their larger professional organizations and networks. So too follows the state level, where state libraries will take the lead in collaboration with at least one large urban and one smaller rural library along with their state library associations. Such an extensive professional network also lends immediate credibility, authenticity, and a built-in network for disseminating the iLead program to LIS professionals across the field.

Traditional dissemination methods will also be used, including attending and presenting at academic presentations, conducting webinars, symposiums, and academic publications. Furthermore, as described in our Digital Products Plan, SJSU will host a website, and we will build a virtual reality (VR) library to help disseminate the results of the planning project. The MOOC prototype and the curriculum outline developed will also be widely marketed and made freely available to all through our coalition and iLead network.

III.   Diversity Plan

The project has been organized to build-in diversity at all levels. Firstly, our advisory-, Directors-, and team-level members all represent different demographics, professional experience, and identities. Secondly, our steering and advisory teams involve national and many NALCo professional organizations as well as library systems representing the unique perspectives of local and regional demographics. Thirdly, our recruited coaches and mentors will represent assorted demographics and identities while also possessing expertise in leadership and EDI, combinations that translate the conceptual to the personal. These built-in perspectives will ensure not only the diversity of the team we include but also the diversity-emphasizing priorities of our entire curriculum and professional training program. With the success of this planning project, implementation will likely be accelerated and based on a valid foundation. Our end goal is to enhance leadership and EDI competencies throughout the current and future LIS workforce by focusing on the competencies of our country's LIS professionals, organizations, and leaders. Such a plan will yield leadership and EDI deliverables in the near and long term.

iLead also will address a core barrier for diversifying the LIS profession: cost of an MLIS graduate degree. Libraries across the country report that their paraprofessional ranks are much more diverse than those who hold an MLIS degree and that cost and access to professional educational LIS content and opportunities are primary challenges faced by their workforce. iLead's deliverables will directly target these disparities and will enable future implementations for resolving this challenge.

IV.   Project Results

Intended Results

This planning project's goals are to 1) Research and identify leadership and EDI core competencies; 2) Design a curriculum outline that specifies measurable learning outcomes; 3) Design an LIS practitioner- and educator-informed accessible, flexible, cost-effective, and impactful library leadership program focused on EDI; 4) Design iLead MOOC curriculum and prototype; 5) Design a post-baccalaureate certificate at SJSU's School of Information, and 6) Prepare an LB21 implementation grant proposal.

To achieve these goals, our national coalition will identify and design the iLead leadership development final deliverables' form based on their needs assessment. At the most fundamental, we envision delivering a MOOC—a free program that removes traditional barriers such as cost, access, and convenience—a graduate post-baccalaureate certificate—which represents a more traditional and formal professional development opportunity—and, potentially, an in-person program. The MOOC prototype will be iteratively designed and carefully tested to ensure its viability, relevance, and overall ease of use.

> **Expected Outcomes**
>
> **1)** Identified leadership and EDI core competencies for inclusion in curriculum.
>
> **2)** A curriculum outline that specifies measurable learning outcomes.
>
> **3)** An LIS practitioner- and educator-informed accessible, flexible, cost-effective, and impactful library leadership program focused on EDI.
>
> **4)** An iLead MOOC prototype designed and ready for future implementation.

iLead outcomes will serve as opportunities supporting LIS professionals who do not intend to pursue an MLIS degree and will also serve as online resources for current and future LIS leaders (see our Digital Products Plan). As part of the knowledge gained from the goals outlined above, we will also explore the possibility of creating a future intensive residency leadership program inspired by UCLA's Senior Fellows program, Snowbird, and the Urban Libraries Council's Executive Leadership program. These programs no longer exist but resulted in major infusion of leaders into the profession.

Expanding Relevance

The expected two or three leadership activities derived from iLead share similar characteristics: (1) They reflect a diverse and impactful set of learning opportunities that will advance the knowledge, skills, and abilities of the LIS workforce, and (2) they are sustainable and will continue after the grant period. Even should this project not advance to an implementation project, iLead's virtual reality library and reports will represent new resources and knowledge to support EDI within LIS professionals. The benefit to society will be a better-prepared LIS workforce empowered with an EDI lens to serve their communities' diverse cultural and socioeconomic backgrounds and needs. Should the implementation grant be funded, the MOOC will remain freely available to the field and will continue to improve over time as feedback and requests for improvement are received.

Sustainable Benefits

The iLead planning grant will serve as a data-driven, research-oriented process that will identify current needs and gaps and propose a set of core competencies and a curriculum to prepare the future generation of LIS leaders with an EDI-lens. Our research, curriculum, and dissemination of findings will be a contribution to the field. This project will also bring library leaders together with NALCo professional organizations to discuss the current state of libraries and issues around EDI. As a planning grant, iLead will be well positioned to develop the proposed curriculum and MOOC in the future, whether it be through a future LB21 implementation grant or through a combination of grant and iLead coalition funding.

V.   Budget Summary

The total funding requested is $148,559.00. This includes cumulative salaries and wages for SJSU senior personnel totaling $22,168.00 (for PI Chow, Co-I Aguiñaga, and Co-Project Manager Alman), $12,500.00 for one instructional designer, fringe benefits ($2,981.00), and travel ($5,000). Subawards include Co-Project Manager Gomez ($12,500.00); Simmons University (for two faculty salaries, travel, and a second instructional designer) ($35,631.00); and a Service Contract for Skilltype ($5,000.00), who will develop a plan for large-scale competency analysis. Additional project level costs include $6,000.00 for five $1,200.00 travel grants to support national advisory committee members attendance at an ALA conference and $3,000 for twenty $150 stipends to support national advisory committee members. Indirect Cost @ 46.5% ($43,779.00). **The total funding requested is $148,559.00.**

Schedule of Completion

iLead One Year Schedule of Activities

Task	Task	9/23	10/23	11/23	12/23	1/24	2/24	3/24	4/24	5/24	6/24	7/24	8/24
Phase 1 - *Coordination:* Organize and coordinate team and stakeholders													
1	Convene project steering committee	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓
2	Finalize state and national advisory committee	▓	▓										
Phase 2 - *Curriculum: Work with broader stakeholders to define program needs* and draft curriculum													
3	Identify gaps and synergies in existing leadership and EDI programs	▓	▓	▓									
4	Identify leadership and EDI core competencies		▓	▓	▓								
5	Consult state advisory committee		▓			▓		▓			▓		
6	Consult national advisory committee		▓						▓				
Phase 3: - *Production: Design iLead curriculum and MOOC Prototype*													
7	Design curriculum outline with learning outcomes			▓	▓	▓	▓						
7.1	Design the curriculum			▓	▓	▓	▓						
7.2	Design the MOOC			▓	▓	▓	▓						
8	Develop MOOC wireframe and specifications							▓	▓	▓	▓	▓	▓
9	Identify and finalize strategic partners							▓	▓	▓	▓	▓	
10	Identify and finalize coaches and mentors							▓	▓	▓	▓	▓	
11	Prepare implementation grant proposal										▓	▓	
12	Submit planning activities findings report												▓

Digital Products Plan

Type - *What types of digital products will you create?*

We have the following digital products:

1) Data, which will include meeting recordings, transcriptions, survey results.

2) Planning documents, which will include documents in Word, PowerPoint, Excel, and Google Drive; the curriculum outline and MOOC wireframe prototype will be in Word and Excel, respectively.

3) The website, which will share and disseminate project findings and progress.

4) The Virtual Reality (VR) library in Mozilla Hubs, which will share and disseminate project findings and progress and also include opportunities to communicate and network.

5) The MOOC prototype, which will likely be in Canvas, but we will determine this specification during the design phase and based on the requirements of the curriculum (see Task 7.2).

Availability – *How will you make your digital products openly available (as appropriate)?*

1) Data will largely be for internal purposes, but aggregate results will be shared with all iLead partners and the results of our planning project will be disseminated on our website, VR library, and through academic presentations and publications, as appropriate and applicable.

2) The planning documents will be for internal use among iLead partners and potentially shared in our final report.

3) The Website will be openly available.

4) The VR library will be openly available via SJSU's hosted website.

5) The MOOC prototype will be openly available through our coalition and iLead network.

Access - *What rights will you assert over your digital products, and what limitations, if any, will you place on their use? Will your products implicate privacy concerns or cultural sensitivities, and if so, how will you address them?*

1) Data will be for internal purposes and, given IRB approvals, will therefore be anonymized. Given the general and non-individual focus of our work, we do not really have any privacy concerns as everything shared with us will be anonymous, confidential, and focused on general concepts and ideas.

2) Planning documents will be for internal use among iLead partners and also potentially shared in our final report; no privacy concerns.

3) The website will be openly available, with no privacy concerns.

4) The VR library will be openly available, with no privacy concerns, and disability-accessible (and equivalent) information and documentation will be made available as requested.

5) The MOOC prototype will be openly available, with no privacy concerns, and disability-accessible (and equivalent) information and documentation will be made available as requested.

Sustainability – *How will you ensure the sustainability of your digital products?*

1) Data will be for internal purposes and will be IRB approved and therefore will be confidential, with no identifying information. The data will be maintained for at least three years in the project Google shared drive, as required by the federal regulations, and maybe kept longer depending on whether iLead is fully developed and implemented.

2) Planning documents will be for internal use among iLead partners and also potentially shared in our final report. The data will be maintained on the project Google shared drive for at least three years, as required by the federal regulations, and maybe kept longer depending on whether iLead is fully developed and implemented.

3) The website will be openly available, hosted by the SJSU iSchool, and maintained by existing staff.

4) The VR library will be openly available, hosted by the SJSU iSchool, and maintained by existing staff.

5) The MOOC prototype will be maintained either by Simmons' or SJSU's existing staff.

Organizational Profile

Mission or Statement of Purpose

The Vision statement for the SJSU School of Information is *to be a global leader in education delivering innovative research and top-quality programs in the information professions*. The Mission is *in support of the University's mission, the School of Information educates information professionals who contribute to the well-being of our global communities and expands the knowledge base of the information professions through research and scholarship*. As an R2 research intensive institution, the SJSU iSchool places teaching and learning as its highest priority before research productivity.

Organization's Governance Structure:

The SJSU iSchool is housed within the College of Global and Professional Education (CPGE), one of nine colleges granting degrees in over 250 areas of study. The iSchool is governed by a Director (department chair) and Associate Director, and the CPGE is overseen by a Dean and two Associate Deans. San Jose State University is one of 23 campuses that comprise the California State University (CSU) System.

Service Area and Stakeholder data

The SJSU iSchool is the largest Masters in Library and Information Science (MLIS) provider in the world and, in 2021, accounted for 13% of all MLIS students. Currently, over 3,000 students are enrolled, representing all 50 states. The SJSU iSchool has the largest graduate program and enrollment in the CSU system.

Organizational History

The first Library Science course was taught at San José State University in 1928, and the School of Information first started offering a graduate degree in Library Science in 1954 and was first accredited in 1969 by the American Library Association (ALA). The SJSU iSchool is the oldest accredited LIS program in California and offers a joint doctoral program with Manchester Metropolitan University (MMU), three master's degrees – library and information science, informatics, and archives and records – a bachelor's degree in information science and data analytics plus several certificates.