Embracing the whole SELF: Social Emotional Literacy Factors and culturally-sensitive information literacy instruction

PROJECT OVERVIEW

Old Dominion University (ODU) and Texas Woman's University (TWU) request $369,400 in support of a three-year LB21 research grant. This Applied Research project targets information literacy instruction curricula within library and information studies (LIS) preparation programs. Project investigators aim to develop a model of information literacy instruction integrating social-emotional literacy and cultural humility with traditional information literacy skills.

The fields of LIS and education have increasingly recognized the importance of integrating psychosocial, emotional, and cultural factors into both professional practice and higher education curricula. However, information literacy (IL) instruction models have not historically integrated either social-emotional factors or cultural humility (CH). Accordingly, the research questions for this project are RQ1) How are LIS faculty currently addressing psychosocial, emotional, and cultural factors of IL within their curricula?; RQ2) How are current secondary school library practitioners addressing psychosocial, emotional, and cultural factors in IL instruction?; and RQ3) What resources and training provided in LIS curricula would prepare secondary school library practitioners to integrate a model of IL instruction that addresses these factors? This project supports the LB21 Goal 3, Objective 3.2 in enhancing the training and professional development of the library workforce to support the needs and wellbeing of their communities. The intended primary outcomes of this project are: 1) a theoretical model of IL instruction addressing psychosocial, emotional, and cultural factors; 2) best practice recommendations in applying the model for both LIS curricula and current secondary school library IL instruction practitioners; and 3) suggestions for developing open-access content modules integrating the model and best practices that can be shared across institutions and LIS programs.

PROJECT JUSTIFICATION

The early framing of IL as a purely cognitive evaluation has been challenged by the epistemological crisis created by social media and the proliferation of information it supports (Agosto, 2018; Crockford, 2023; Ramos & Nycyk, 2020). The COVID-19 pandemic and accompanying "infodemic" have only worsened this crisis (Cinelli et al., 2020). Today's information professionals must incorporate a holistic perspective of information as a psychosocial, cultural, and emotional phenomenon (Oliver et al., 2021), particularly with patrons coming from different cultures, social information contexts, and emotional states than themselves (Hewitt, 2023). Moreover, IL instruction must prepare individuals to apply this holistic understanding of IL to their own everyday lives. A reframing of IL can therefore encourage information professionals to approach IL instruction with a CH lens (Getgen, 2022), informed by intellectual empathy (Linker, 2016).

Augmenting Existing Information Literacy Frameworks

Currently, much of the IL instruction aimed at equipping individuals with the necessary skills to navigate information–especially mis- and dis-information–in digital environments has taken the form of post-hoc interventions that focus on the cognitive aspects of information, such as evaluating authority and fact-checking (Simons & Elkins, 2023). Such one-off IL interventions that purely focus on the cognitive aspects of information have unfortunately not proven to be very effective for developing new information evaluation skills within the general population (Simons & Elkins, 2023). Additionally, research has consistently shown that IL instruction that is not institutionally proactive (Badke, 2011) or is only presented in "one shot" formats (Leung, 2022; Nicholson & Seale, 2022) does not truly prepare individuals to apply nuanced and effective IL skills across different situations and information formats.

Supporting Secondary School Information Literacy Instruction

While people of all ages need to develop sophisticated IL skills in order to navigate the current digital informational landscape (Burke, 2010; Eisenberg, 2008; Haider & Sundin, 2022), young adults are well-positioned to acquire these skills as part of their educational curricula. In particular, secondary students have been targeted for a number of IL instructional programs and interventions (e.g., Alamettälä et al., 2019; Herring, 2011; McPherson & Dubé,

2016; Meyers & Eisenberg, 2021; Stanoevska-Slabeva et al., 2015). Such efforts have had mixed success, at best, and the persistently low evaluation of secondary students' IL and their lack of IL skills needed to transition successfully to postsecondary education remains a serious concern (McPherson & Dubé, 2016; Stanoevska-Slabeva et al., 2015). Without additional research, however, it is not clear how to best prepare young adults to approach the psychosocial, cultural, and emotional aspects of IL–or even the extent to which their integration might improve students' IL skills.

Integrating Social-Emotional Learning and Cultural Humility

One promising angle of approach is to integrate the frameworks of social-emotional learning (SEL) and cultural competence/humility. SEL may be understood as a "set of evidence-based programs and practices for enhancing social-emotional-cognitive development" aimed at establishing "safe and supportive learning environments" where students can develop "social and emotional competencies (SECs) including the abilities to understand and manage emotions, set and achieve positive goals, feel and show caring and concern for others, establish and maintain positive relationships, and make responsible decisions" (Mahoney et al., 2021, p. 2). SEL is increasingly used in secondary education curricula to help students develop an awareness of these factors in areas of instruction other than IL (Atwell & Bridgeland, 2019; Januszkiewicz et al., 2023; Mahoney et al., 2021).

At the same time, educators have been pursuing a greater implementation of culturally responsive (CRP) and culturally sustaining pedagogy (CSP) in both secondary and postsecondary settings (Januszkiewicz et al., 2023; Ladson-Billings, 2021). These practices have begun to lead educators to the concepts of cultural competence or cultural humility as a framework for how to work with others who may have different social and cultural backgrounds than themselves (Hilliard & Edwards, 2024; Samuels, 2018; Wohlfarth et al., 2021). Cultural humility (CH) may be defined as "the ability to maintain an interpersonal stance that is other oriented in relation to aspects of cultural identity that are most important to the other person, the ability to recognize the context in which interactions occur, and a commitment to redress power imbalances and other structural issues to benefit all parties" (Hurley et al., 2019, p. 549)

Preparing Practitioners for IL Instruction Within LIS Curricula

Despite a similarly-growing emphasis on CH within the field of LIS (Overall, 2009; Ryan & Rashid, 2023), very little research has considered how this framework is being taught in relation to IL and IL instruction within LIS curricula. At the same time, while some LIS practitioners have begun adopting factors related to SEL into their practice (Phillips, 2017), LIS faculty have not widely integrated SEL into their curricula. Finally, little research has considered how information professionals might incorporate these factors into models of IL and IL instruction.

Bringing Theory and Practice Together to Address Current Gaps in Secondary IL Instruction

The fields of both K-12 and higher education have recently begun emphasizing SEL (Spady, 2022; Stickle et al., 2019; Yoder, 2014) and cultural sensitivity, competence, and/or humility (Hawkins-Jackson, 2023; Hilliard & Edwards, 2024; Lund & Lee, 2018) in their own instructional models and teacher preparation. Current information professionals working in school libraries may therefore have important experiential knowledge in bridging these disciplines that can be used to better prepare future professionals. This practice-based knowledge may directly contribute to refining current LIS curricula to better address IL and IL instruction through a more holistic approach.

Embracing the Whole SELF: Integrating Holistic IL Instruction into LIS Curricula

The "Embracing the Whole SELF" project aims to address the above gaps with the following Research Questions: **RQ1**) How are LIS faculty currently addressing psychosocial, emotional, and cultural factors of IL within their curricula?; **RQ2**) How are current secondary school library practitioners addressing psychosocial, emotional, and cultural factors in IL instruction?; and **RQ3**) What resources and training provided in LIS curricula would prepare secondary school library practitioners to integrate a model of IL instruction that addresses these factors?

By bringing together the results of this research with previous work in each of the above areas, the fields of both IL instruction and LIS more broadly will have a better understanding of how psychosocial, emotional, and cultural factors relate to IL theory and practice. Additionally, practitioners will be better prepared to serve diverse populations in a psychosocially- and culturally-sensitive manner and to encourage the development of these skills in their patrons.

TARGET GROUP, BENEFICIARIES, AND LB21 GOAL

The primary group that this research project targets is **faculty of LIS education programs in postsecondary institutions**, with the goal of supporting the development of LIS curricula that will clearly incorporate a holistic approach to understanding IL and implementing IL instruction for secondary students, particularly focusing on aspects of **evaluating, using, and communicating** information. Additional beneficiaries of this project include current secondary school library practitioners, future secondary school library practitioners, and students in LIS programs who may be future practitioners in additional information institutions. The long-term goal of this research is preparing young adults to apply a holistic approach to IL in their own lives; therefore, the ultimate beneficiaries of this research are secondary school students across diverse institutions in the United States. This research supports **LB21 Goal 3, Objective 3.2 in enhancing the training of the library workforce to support the needs and wellbeing of their communities**.

PREVIOUS WORK

While addressing multiple gaps in knowledge about how psychosocial, cultural, and emotional factors may be integrated into secondary IL instruction and LIS curricula teaching IL, this project builds upon work in a number of areas. **One important contribution of this project is to bring together this research and practice from different areas of study in a novel way that has not been substantially discussed, in order to create a more holistic approach to IL instruction**.

Information Literacy Models and Frameworks

Since the first use of the term "information literacy" (Zurkowski, 1974) and the ALA Presidential Committee Report on Information Literacy (ALA, 1989), both researchers and practitioners have proposed a number of models to conceptualize the skills and knowledge that IL incorporates. Some of the most referenced general frameworks include the ACRL Framework for Literacy in Higher Education (ACRL, 2015) and the SCONUL seven pillars model (SCONUL, 2015); neither of these frameworks focus more than briefly on the importance of psychosocial, emotional, or cultural factors. The approach of Critical Information Literacy (CIL) has made progress in addressing factors beyond the cognitive within the field of postsecondary IL instruction (Tewell, 2015; Ward, 2022), despite ongoing struggles with the "one-shot" approach (Tewell, 2018). However, CIL focuses primarily on sociopolitical factors rather than individual emotional, psychosocial or cultural factors. While few IL frameworks incorporate such factors, even fewer provide clear approaches to assessing them. One review found only eight papers that discussed IL models while "covering all aspects from conceptualization to empirical validation" (Stanoevska-Slabeva et al., 2015, p. 5). Accordingly, this research will address gaps in the conceptualization of these factors within IL frameworks and in clear metrics for evaluating IL in those areas.

Information Literacy Instruction Approaches Used in K-12 Preparation

Several current IL frameworks have been adapted to prepare pre-service professionals for K-12 IL instruction; some of the most commonly-used approaches include Eisenberg's Big6 and Super 3 models (Eisenberg, 2008; Eisenberg et al., 2016; Eisenberg & Berkowitz, 1992) and Stripling's Inquiry/Literacy model (Pitts et al., 1995; Stripling, 2010). Of the available approaches, more traditional processes, such as Big6 have gained favor in school library practice–when an information literacy model has been adopted at all. In an attempt to infuse more affective and socioscientific considerations into IL instruction, Maniotes and Kuhlthau suggest the Information Search Process (ISP) and Guided Inquiry Design (GID) (Kuhlthau, 2021; Kuhlthau et al., 2015). Each of these models suggest students begin with a stance of wonder and curiosity. Their research explored the complex interconnected nature of student feelings and emotions with the "heavy" cognitive nature of research tasks and acknowledged the need to address the emotions associated with inquiry and the research tasks (Kuhlthau et al., 2015). However, the more complex design of the ISP or GID and length of time to engage in the full process have discouraged many K-12 IL instructors from using the model as it was designed.

Attempts to create a more culturally sensitive or inclusive model have likewise not garnered much success. The Working Exit Outcomes (WEO) framework proposed by the Kamehameha school in Hawaii attempted to bring the cultural identity of Hawaii to the information literacy process (Naluai, 2014). Though framed with a cultural stance, this model continued to leave much of the affective, emotional considerations out of the inquiry. Additionally, many IL instruction approaches continue to use a "one shot" or highly-targeted approach, rather than presenting a more

comprehensive view of IL (Eisenberg, 2014). While Eisenberg et al. (2016) design contemporary Big6 instruction to be delivered across multiple sessions over multiple months, it is not clear that this approach has been widely adopted.

This project will therefore address these gaps in considering factors beyond cognitive processes within K-12 IL instruction. Additionally, this research aims to better understand the current practice of K-12 IL instruction, including which frameworks practitioners are using and how they might be integrating non-cognitive factors into their instruction.

Information Literacy and Secondary Students

Most of the general trends in IL instruction apply to the specific landscape of IL in secondary education: a need to integrate ICT and social media literacy, an overall lack of systematic instruction approaches beyond "one shots," and a near-total focus on cognitive evaluation processes. Researchers have additionally pointed out the lack of clear standards for measuring the success of IL instruction for secondary students (Stanoevska-Slabeva et al., 2015).

The small amount of research on secondary students' IL skills indicates, however, that objective assessment and corrective measures are critically needed (McPherson & Dubé, 2016). Secondary students consistently overestimate their own information literacy (Spisak, 2023), yet "the vast majority of students have a low level of IL" (Stanoevska-Slabeva et al., 2015, p. 11). While some research found no significant differences due to gender (Argelagós & Pifarré, 2017), it is unclear how different demographic variables (e.g., racial, geographic, socioeconomic) might affect success in secondary IL instruction. Accordingly, this research will address gaps in both the success of IL instruction in secondary institutions and in the lack of comprehensive and holistic IL instruction for diverse groups of secondary students.

Preparing Information Professionals for Information Literacy Instruction

In addition to LIS curricula, professional organizations including the ALA, ACRL, and AASL provide guidance to educators and practitioners on IL instruction. The 2019 AASL/ALA/CAEP Preparation Standards for School Librarians identify IL skills within the components of competencies for preservice school librarians. AASL embeds information literacy within the Frameworks for Learners as well as for School Librarians. These skills are diffused amongst several of the Shared Foundations. Though the AASL *National School LIbrary Standards for Learners, Librarians, and School LIbraries* situates instruction within four learning domain, one of which is the affective domain of GROW, there is little direct attention provided to how one might inform instruction of information literacy to include aspects beyond cognitive factors. This project therefore aims to support a more holistic preparation of IL instruction practitioners through both formal LIS curricula and the guidance of standards developed by professional organizations such as the AASL and ACRL.

SEL Factors and Cultural Humility in Secondary Education

Mahfouz and Anthony-Stevens (2020) argue that "any SEL curriculum that does not deeply consider culture as the central framework through which learning occurs likely perpetuates inequity" (p. 60) and that "the [social and emotional competencies] of teachers and school leaders play a pivotal role in advancing transformative SEL" (p. 61). However, a recent systematic review and meta-analysis of SEL interventions for K-12 students showed a serious lack of understanding within the field of the experiences of students with marginalized and minoritized identities, despite evidence that SEL programs can support these students (Cipriano & McCarthy, 2023). Integrating CH into the development of SEL curriculum helps secondary educators build a community of practice around CSP/CRP (Flores, 2023).

Cultivating CH is not only important for students: research indicates that secondary students from equity-deserving groups form higher-quality relationships with and have more trust in teachers that they perceive as having higher CH (Slaton et al., 2023; Srisarajivakul et al., 2023). However, systematic preparation for secondary educators to implement CH and SEL has not yet been widely adopted. For example, a recent comprehensive review of CRP-related competencies covered in teacher education programs found that nearly all courses discussed were stand-alone, short-term courses that focus on only one relevant competency (Gulya & Fehérvári, 2023). To address these gaps, this research will not only illuminate current use of SEL and CH in secondary IL instruction, but also aims to use the knowledge of SEL and CH within secondary education more broadly to prepare school librarians and IL instructors.

Integration of SEL Factors and Cultural Humility in LIS Curricula

Researchers and practitioners–particularly from equity-deserving groups–have increasingly advocated for LIS

curricula to cultivate cultural competence/humility within students (Andrade & Rivera, 2011; Blackburn, 2015; Cooke, 2017; Cooke et al., 2016; Kumasi & Hill, 2011; Mestre, 2010). Hill and Kumasi found that while LIS students enrolled in school library or youth services tracks considered cultural competence concepts related to education to be very important, most reported only "low to moderate knowledge gains in cultural competence education" after completing LIS coursework (Hill & Kumasi, 2011, p. 6). Despite this need, however, "LIS scholarship remains limited on practical teaching assignments that incorporate experiential and introspective approaches" to develop CH (Singh, 2020, p. 123).

Little research so far has examined how LIS curricula may be preparing practitioners–including school library professionals–to address SEL in either their personal or professional lives. This project will therefore fill a substantial gap in research and practice in understanding the role of SEL within LIS curricula.

Embracing the Whole SELF: Bringing Together Research and Practice for Holistic, Inclusive IL Instruction

By bridging a number of gaps within previous work in each of the above areas, this project aims to put research and practice (from the fields of both Education and LIS) into direct conversation. This work will address critical needs for the fields of both IL instruction and LIS more broadly to incorporate psychosocial, emotional, and cultural factors within IL theory and practice. Finally, the results of this research should inform LIS curricula and better prepare practitioners to serve diverse populations through adopting the lenses of SEL and CH.

PROJECT WORK PLAN

This Applied Research project will be conducted over three years and include personnel from two institutions.

PERSONNEL

Each of the PIs on the project brings experience in the areas of IL, psychosocial factors of information behavior, and CH. PI **Dr. Rea Simons**' (ODU) research addresses preparing information professionals to serve diverse communities, particularly through inclusive approaches to technology design and implementation (Barker et al., 2015; Simons et al., 2016; Simons, Fleischmann, et al., 2020; Simons, Girard, et al., 2020; Simons & Fleischmann, 2017). PI Simons' research additionally aims to guide LIS faculty in adopting inclusive instructional practices (De La Rosa, Elkins, et al., 2021; Simons et al., 2023), as well as integrating aspects of DEIA and cultural humility within LIS curricula (De La Rosa, Simons, et al., 2021; Mallary et al., 2023; Roy & Simons, 2023).

PI **Dr. Aaron Elkins'** (TWU) research investigates how psychosociocultural factors influence interactions with information (e.g., Hollister et al., 2020). PI **Dr. Elizabeth Burns** (ODU) investigates LIS instruction using a cultural competency lens (e.g., Burns, 2023) and IL instruction for LIS professionals across various information settings (e.g., Burns et al., 2019). PIs Elkins and Burns additionally have extensive knowledge of K-12 library practice and LIS curricula focused on preparing school librarians. Both PIs participate in related professional networks, such as the American Association of School Librarians (AASL).

Advisory Board

The PIs will assemble a five-member advisory board consisting of members from a diverse range of backgrounds, specialties, and institutional types (see also supporting documents). The primary roles of the advisory board will be to 1) help validate the design of survey and interview instruments, 2) assist in iterative evaluation and assessment throughout the project, 3) advise on final outcomes of the project (e.g., curricular recommendations), and 4) ensure diversity (e.g., geographic, racial, institution type) of the stakeholders and participants recruited.

Dr. Joe Sanchez will provide valuable experience with approaching secondary students' information behavior in an SEL- and CH-informed approach. Dr. Sanchez is an Associate Professor in the Graduate School of Library and Information Studies at Queens College (CUNY), a Mellon Fellow, a Google/ALA fellow in the Libraries Ready to Code Program, and a founder of the iSchool Inclusion Institute (i3). Dr. Sanchez is currently a PI on the IMLS grant "Teenage BIPOC Readers of Manga: Librarians Learning from Teens of Color" and has served on several advisory boards. **Dr. Meghan Harper** will provide guidance on the stakeholder perspective of LIS faculty as the Director of the School of Information at Kent State University and school library media concentration coordinator. Dr. Harper additionally has extensive experience in assessment and accreditation and has served on Council for the Accreditation of Educator

Preparation (CAEP) and the Committee on Accreditation for the American Library Association. Finally, **Dr. Tancy Vandecar-Burdin** will represent ODU's Social Science Research Center and assist in evaluating and validating project design, particularly for the surveys in years one and two. Dr. Vandecar-Burdin has over 20 years of experience with data collection and analysis. The SSRC will also provide additional quantitative data analysis support for the surveys.

Additional roles of **a current school librarian/administrator** (representing the stakeholder perspective of school library practitioners) and an **academic library IL instruction expert** (who can provide perspective on the preparation of secondary students for transition to applying IL within their postsecondary education) will be filled before the beginning of the project. All advisory board members will receive a stipend for each of the three years of the project.

Graduate Research Assistant

One MLIS student will be recruited from ODU to assist with this project in years one and two. Preference will be given to applicants from equity-deserving populations (i.e., BIPOC, LGBTQIA+ students, students with disabilities).

THEORETICAL AND METHODOLOGICAL APPROACH

PI Simons and PI Elkins have developed a preliminary theoretical approach to integrating CH and psychosocial information behavior into IL (Simons & Elkins, 2023); this project offers an opportunity to further develop that framework and investigate how it aligns with current LIS curricula and practice. For the purposes of this project, we will adopt a commonly-used definition of IL, wherein "information literacy is the ability to find, evaluate, organize, use, and communicate information in all its various formats, most notably in situations requiring decision making, problem solving, or the acquisition of knowledge" (e.g., Lands, 2023). However, as this definition incorporates many facets of IL and IL instruction, this project will specifically address IL skills related to **evaluating, using, and communicating** information. "Information Literacy" will additionally be operationalized as inclusive of all formats and without specifying any differences between terms such as "digital literacy" or "media literacy."

Similarly, in order to be as inclusive as possible in understanding how psychosocial, emotional, and cultural factors are being integrated into both professional practice and LIS curricula, we are adopting a broader scope and definition of both SEL and CH. One of the intended theoretical outcomes of this research is to better understand which aspects of established SEL and CH models may be relevant to secondary IL instruction.

Given the investigative nature of the research questions and lack of prior research in this area, the overall methodology will consist of a constructivist, modified Grounded Theory approach (Cutcliffe, 2005). This approach will allow the team to draw on previous theory and frameworks to generate starting questions and concepts, while still allowing for novel concepts to emerge during the research process. The methodology also prioritizes psychosocial processes in the development of theory and emphasizes the importance of participants' own understandings.

SCHEDULE

YEAR 1

RESEARCH ACTIVITIES: The team will focus on RQ1: **How are LIS faculty currently addressing psychosocial, emotional, and cultural factors of IL within their curricula?** The team will first conduct a thorough literature review in the intersection of these areas, while finalizing the advisory board. Drawing on the expertise of the advisory board, **a survey** will be developed by the PIs to assess to what extent current LIS programs are discussing these factors in relation to IL and IL instruction. Survey questions will also investigate the current landscape of how IL and IL instruction is being covered more broadly, including asking what models of IL and IL instruction faculty are teaching and in which courses. This survey will be distributed through LIS faculty listservs and to LIS program directors, with **in-person or online follow-up interviews** conducted by the PIs to further investigate what faculty perceive to be both strengths and gaps in the current curricula focused on IL and IL instruction. Faculty will also be asked to share relevant syllabi or reading lists used in LIS courses. Open-ended survey responses, interviews, and any collected syllabi/reading lists will be analyzed by the GA and PIs using **thematic analysis** (Braun & Clarke, 2022).

OUTCOMES AND EVALUATION: The primary outcome at the end of year one will be a better understanding of the current landscape of IL and IL instruction within LIS programs, including: IL and IL instruction models being taught to

future practitioners, the extent to which SEL and CH are being integrated into IL-related curriculum, and strengths and gaps that faculty have identified in their teaching of these concepts. This outcome will be evaluated at the end of year one with the assistance of the advisory board, as well as through member-checking with LIS faculty during workshops at professional conferences (e.g., the Association for Library and Information Science Education (ALISE)) early in year two.

DISSEMINATION: These findings will be shared in a journal article in a venue targeting LIS faculty (e.g., *Journal of Education for Library and Information Science (JELIS)*). Results will additionally be shared and enhanced through an organized conference workshop or panel at the annual meeting of ALISE in Fall 2025.

YEAR 2

RESEARCH ACTIVITIES: The team will investigate RQ2: **How are current secondary school library practitioners addressing psychosocial, emotional, and cultural factors in IL instruction**? Informed by results of Year 1 and guided by the advisory board, PIs will develop **a survey** for secondary instructors of IL (primarily school librarians). This survey will assess how current secondary school librarians are discussing SEL and CH in relation to IL and IL instruction in their daily practice. Survey questions will also investigate which models of IL and IL instruction secondary practitioners are using with and teaching to their students, as well as what approaches practitioners are using to apply these models. The survey will be distributed through professional networks and organizations (e.g., AASL, ALA, and state chapters of AASL and ALA). Quantitative data from the survey will be analyzed by the GA and PIs using **statistical analysis** and qualitative data by **thematic analysis** (Braun & Clarke, 2022). **Follow-up interviews and focus groups** with secondary school practitioners will be conducted by PIs at relevant professional conferences (e.g., AASL 2025, ALA 2026, VLA 2025, TLA 2026) and online. Interview and focus group questions will be informed by survey data and use **critical incident technique** (Chell, 1998) to guide practitioners in describing specific instances involving psychosocial, emotional, and cultural factors of IL; data will be analyzed by the GA and PIs using **thematic analysis**.

OUTCOMES AND EVALUATION: The primary outcome at the end of Year Two will be a better understanding of the current landscape of IL and IL instruction within secondary schools, particularly the ways in which psychosocial, emotional, and cultural factors are being addressed by IL instruction practitioners. These findings will include an assessment of what practitioners are currently doing, how successful practitioners feel that their current IL models and approaches are for addressing SEL and CH factors, and sources where practitioner knowledge related to IL instruction was learned (e.g., LIS programs, peers, professional development venues). This outcome will allow for direct comparison with and impact on LIS curricula in year 3. These findings will also allow for the creation of high-level recommendations for current secondary school library practitioners to better integrate awareness of psychosocial, emotional, and cultural factors into their IL instruction, particularly by focusing on strengths and gaps identified by participants. These outcomes will be evaluated at the end of year two with the assistance of the advisory board, as well as through member-checking with practitioners during workshops at professional conferences in years two and three.

DISSEMINATION: These findings will be shared in a journal article in a venue targeting IL instruction practitioners (e.g., *Journal of Information Literacy (JIL)*) and in a white paper/report for ALA and AASL on why secondary IL instruction models and practices should include psychosocial, emotional, cultural factors. Results will additionally be shared and enhanced through an organized session sponsored by AASL at ALA in Summer 2026 and state chapters (e.g., Virginia ASL, Texas Library Association) in 2025-2026. In order to extend opportunities to those unable to attend these conference venues, PIs will additionally host an online webinar in Summer or Fall 2026 to share high-level practitioner recommendations. Finally, preliminary findings from Year 2 will be shared at the sponsored session at AASL 2025 and complete Year 2 findings will be shared in a sponsored session at the 2027 AASL conference (see supporting documents).

YEAR 3

RESEARCH ACTIVITIES: The PIs will focus on comparing and synthesizing results from the first two years of the project to address RQ3: **What resources and training provided in LIS curricula would prepare secondary school library practitioners to integrate a model of IL instruction that addresses psychosocial, emotional, and cultural factors**? Any remaining interview or focus group data will be analyzed using thematic analysis. In particular, **data synthesis** between

years one and two will focus on: comparisons between LIS faculty's and secondary school practitioners' views on the role of SEL and CH in IL and IL instruction, comparisons between the IL models currently taught in LIS curricula and the IL models being used by practitioners, considering how any gaps identified by practitioners in their IL instruction approaches might be addressed through LIS curricula, and considering how any strengths identified by practitioners might be amplified in LIS curricula. Additionally, PIs will use the findings from year two to **refine a theoretical model** of how psychosocial, emotional, and cultural factors influence IL and IL instruction. Finally, the PIs will use the refined model and synthesized findings to **generate suggestions for developing curricular content modules** integrating the model and best practices that can be shared across institutions and LIS programs. Informational and promotional materials will also be created to contextualize this instructional content and host it online for sharing.

   OUTCOMES AND EVALUATION: The culmination of the project in year three will result in two primary outcomes: 1) refined models of IL and IL instruction that better integrate psychosocial, emotional, and cultural factors, and 2) suggestions for developing content modules that leverage these refined models to provide practice-oriented instruction of how to better incorporate these factors. These outcomes will be supplemented by high-level recommendations for both LIS faculty and secondary school library practitioners in implementing the models and instruction. These outcomes will be evaluated by the advisory board before final dissemination, as well as through member-checking with practitioners during workshops at professional conferences in years two and three.

   DISSEMINATION: The final outcomes of this project will be shared in conference presentations targeting LIS program faculty (e.g., at ALISE, ASIS&T, LibLearnX), partly to build awareness of where to find the framework and supporting recommendations. PIs will utilize a website that is supported by ODU's institutional repository and Information Technology Services to host information about the framework and implementation suggestions along with contextualized guides and a short introductory video for LIS faculty. Additionally, the PIs will host webinar(s) targeting both LIS program faculty and IL practitioners and introducing them to the models and curricular content recommendations. For greater reach and impact, the PIs will partner with relevant SIGs from professional organizations (e.g., ALISE, ALA, AASL, ASIS&T) to promote and share the webinar. The impact of these final outcomes for secondary school library practitioners will be discussed in a partnered session at the 2027 AASL conference. Finally, these findings will be shared in publication(s) aimed at LIS faculty and IL instruction practitioners (e.g., *JELIS*, *JIL*).

RECRUITMENT STRATEGIES AND IRB APPROVAL

   This project has two populations of participants: LIS program faculty and secondary school library practitioners. LIS program faculty will initially be recruited through listservs maintained by professional organizations such as ALISE and the Association for Information Science & Technology (ASIS&T). Additional snowball recruitment will also be encouraged among the initial survey participants and through personal networks of the PIs (e.g., Special Interest Groups (SIGs), the iSchool Inclusion Institute). Faculty attendees of workshops and panels (e.g., at ALISE and ALA conferences) may additionally be recruited. In order to ensure diversity of participants, basic demographics about faculty and their institutional affiliations will be collected; additional participants may be specifically invited in order to address any gaps.

   Secondary school library practitioners will be recruited through similar approaches. Practitioners will initially be recruited through the listservs of practice-oriented professional organizations such as AASL, ALA, and state chapters of these organizations. Additional snowball recruitment will also be encouraged among the initial survey participants and through personal networks of the PIs (e.g., Special Interest Groups (SIGs)). Practitioner attendees of workshops and panels where this research is discussed (e.g., at AASL and ALA conferences) may additionally be recruited. In order to ensure diversity of participants, basic demographics about practitioners and their institutional affiliations will be collected; additional participants may be specifically invited in order to address gaps.

   Prior to any participant recruitment, PIs Simons and Burns will submit the project for review to the ODU Institutional Review Board (IRB) during August of 2024. PI Elkins will also go through TWU's IRB approval process for the project. The ODU MLIS GA will also be required to undergo human subjects training and be added to the IRB approval before beginning any IRB-covered tasks (i.e., data collection and analysis).

DIVERSITY PLAN

This project addresses LB21 Goal 3 related to improving both the field's and individuals' ability to serve diverse communities in a culturally, emotionally, and psychosocially sensitive manner. The resulting holistic frameworks of IL and IL instruction will enable LIS faculty and the practitioners they prepare to better understand differences in approaches to IL between individuals and groups–particularly equity-deserving groups. These frameworks will not only improve IL instruction outcomes but will also equip both educators and their students with a greater understanding of their own cultural, emotional, and psychosocial factors related to **evaluating, using, and communicating** information.

Accordingly, the project will highlight the needs and experiences of diverse practitioners and underserved/equity-deserving communities. Participants will be recruited from a range of institutions, including majority-BIPOC institutions and rural and urban institutions. One of the important gaps that this research will address is a greater incorporation of these groups' voices and experiences into the field of IL and IL instruction. Additionally, this project will prepare LIS faculty and practitioners to approach IL instruction for these populations with greater social and emotional awareness, as well as with cultural humility.

One important task of the advisory board will be to ensure that the project successfully includes these perspectives. The advisory board will therefore also consist of members from diverse institutions and geographic regions, as well as from historically underrepresented groups. The board's guidance will be invaluable to ensure that the design of survey and interview instruments, the recruitment of participants, and the final outcomes of the project (i.e., framework(s) and curricular recommendations) are inclusive and appropriate for equity-deserving communities.

Finally, as part of the effort to recruit and retain members of equity-deserving groups into the field, preference will be given to hiring graduate assistants from such groups (and offering full tuition support). Participation in this project will offer the GAs a greater understanding of research, practice, and education within the field of LIS. All three PIs and members of the board (as appropriate) will offer support and mentorship to the GAs in order to promote success in their long-term goals within the field. This mentorship will therefore additionally support greater diversity within the field.

PROJECT RESULTS

This project has three main areas of expected results: 1) a theoretical model of IL instruction addressing psychosocial, emotional, and cultural factors; 2) best practice recommendations in applying the model for both LIS curricula and current secondary school library IL instruction practitioners; and 3) suggestions for developing content modules integrating the model and best practices that can be shared across institutions and LIS programs. These results will generate contributions to both theory and practice that benefit the target group and additional beneficiaries.

CONTRIBUTIONS TO THEORY

The primary outcome of this research is to advance the field's understanding of how psychosocial, emotional, and cultural factors should be accounted for within a more holistic approach of IL instruction. Currently, only a few models of IL incorporate any such factors–let alone all of them. Accordingly, a necessary first step to incorporating these factors into IL *instruction* is to re-evaluate current models of what *information literacy* itself is. A refined model of IL that is informed by current practice will prepare LIS educators and information professionals to conceptually understand and practically address factors related to SEL and CH within IL instruction. Additionally, identifying psychosocial, emotional, and cultural factors relevant to IL instruction will allow for direct comparison to established SEL and CH frameworks and discussion of how those frameworks may or may not map directly to IL. The IL model will then guide recommendations for preparing current and future professionals to approach IL for diverse groups of patrons/users in a culturally, emotionally, and psychosocially sensitive manner.

Finally, building upon a more holistic conception of information literacy, this project will develop a framework for adopting more nuanced approaches to IL instruction. This framework will also be a theoretical contribution that is relevant not only for the practice of IL instruction, but can also be further examined and refined through future research. While the primary focus of this framework will be IL instruction in the secondary education setting, it may have areas of general applicability beyond this population.

CONTRIBUTIONS TO PRACTICE

This project initially has implications for instructional practice within LIS programs, including supporting more inclusive educational approaches. The theoretical models and the content modules will additionally prepare LIS faculty *themselves* to understand IL and IL instruction as interlinked with aspects of SEL and CH; this will further enhance the field's ability to respectfully address both LIS students and members of the broader community. In order to integrate a more holistic IL model into practice through graduates of LIS programs, LIS faculty must first understand and adopt the model. The next step would be for current and future secondary school librarians to internalize the IL model and approach to IL instruction, so that they may successfully inculcate these skills within their own secondary students.

Findings and recommendations related to practice will be shared broadly through professional organization networks appropriate for a wide range of higher education institutions and of current sites of secondary IL instruction. Concrete outcomes developed for practice, particularly suggestions for developing content modules, will be shared online and presented through webinars. The advisory board will play an important role in ensuring that outcome dissemination will reach a broad and diverse range of practitioners and faculty.

OUTCOMES FOR TARGET GROUP AND BENEFICIARIES

The target group of LIS faculty will benefit most from the primary project results. The outcomes relevant for faculty include: the refined theoretical models of IL and IL instruction, the suggestions for developing content modules and accompanying implementation best practices, participatory workshop(s) and webinar(s), and additional findings within research articles in peer-reviewed journals. The additional beneficiary (and participant) group of secondary school library practitioners will benefit from some results, including: high-level recommendations for integrating SEL and CH factors in IL instruction (including a white paper), participatory workshop(s) and webinar(s), and reviewing the holistic IL instruction model. Students in LIS programs (including future secondary school librarians and those interested in other information institutions) will additionally benefit from the incorporation of the model and course content in terms of advancing their own holistic understanding of IL and in translating the model to their professional domains. Finally, the long-term beneficiary group of young adults in secondary education will be able to apply a holistic approach to IL, as school library practitioners implement the expanded IL model in their IL instruction.

GENERALIZABILITY AND SUSTAINABILITY

The holistic model of IL (and associated recommendations) will be generalizable to share with all LIS faculty and programs, as well as to inform practitioners across all settings. The content and recommendations specifically addressing secondary IL instruction will be applicable to a diverse range of secondary schools across the United States; much of the content suggestions will also be generalizable to other types of IL instruction. An important role of the advisory board will be to ensure the relevance of these project outcomes for a diverse range of educators, programs, practitioners, and institutions. Additionally, frequent member checking through workshops and other opportunities throughout the course of the project will provide formative feedback on the generalizability and relevance of the research outcomes.

The website hosting the framework and supporting recommendations will remain available indefinitely beyond the end of the project. ODU's institutional repository will additionally host versions of any related publications for open access by the public. By sharing the suggestions for developing instructional content modules online and promoting them in diverse venues (e.g., listservs, publications, workshops, webinars), LIS faculty will be able to incorporate relevant content as anything from part of a single course to a substantial part of their program curriculum. The incorporation of this content into LIS curricula will ensure sustainability of the outcomes. Additionally, sharing the practitioner-focused content and recommendations with professional organizations such as AASL will ensure that the IL instruction framework and associated model remains a part of school library practitioners' ongoing professional development.

YEAR ONE	Aug 2024	Sep 2024	Oct 2024	Nov 2024	Dec 2024	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	June 2025	July 2025
Convene full advisory board	■	■										
Conduct literature review	■	■										
Submit IRB for survey and focus group data collection		■	■									
LIS Educator survey development		■	■									
LIS Educator survey deployment			■	■								
Follow-Up Interviews from Survey				■	■	■						
Analysis of Survey and Interview Findings					■	■	■	■	■			
Drafting of Manuscript to share early findings									■	■	■	■

YEAR TWO	Aug 2025	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026	Mar 2026	Apr 2026	May 2026	June 2026	July 2026
Survey development for school library practitioners	■	■										
Survey deployment for school library practitioners		■	■									
Share Findings from Year 1 at ALISE Annual Conference			■									
Follow up interviews from survey			■	■	■							
Focus group interviews at conferences (AASL, VLA, TLA)			■	■					■			
Analysis of survey and interview data			■	■	■	■	■	■	■			
Draft white paper for dissemination of preliminary findings								■	■	■	■	
Dissemination of preliminary findings: Presentation at ALA annual conference											■	
Analysis of presentation evaluations; refine presentation as needed												■

YEAR THREE	Aug 2026	Sep 2026	Oct 2026	Nov 2026	Dec 2026	Jan 2027	Feb 2027	Mar 2027	Apr 2027	May 2027	June 2027	July 2027
Finalize analysis to include feedback obtained through presentations	■	■										
Compare findings from Y1 & Y2		■	■									
Use findings from Y1 & Y2 to refine a theoretical model		■	■	■								
Develop suggested curricular revisions and training modules for LIS instruction			■	■	■							
Host a webinar to share model and curricular suggestions						■						
Refine model and suggestions based on final feedback						■	■					
Draft manuscript to disseminate findings						■	■	■	■			
Create final iteration of the resources in a website to remain accessible online post-project								■	■	■		
Final project reports											■	■

Digital Products Plan

TYPE

This project will generate the following digital products:

RESEARCH DATA

Survey and interview instruments: Two surveys (one for LIS faculty and one for secondary IL practitioners) will be created and deployed online using Qualtrics [.qsf], which is provided by ODU. Interview instruments will be created for focus group interviews and individual interviews; separate instruments will be created for both faculty and practitioners. Drafts and copies of survey and interview materials [.doc and .xls formats] will be kept for the team's use and advisory board feedback in Microsoft OneDrive/Sharepoint, provided by ODU.

Online survey data: All online survey response data will be collected within Qualtrics. Downloaded/exported data [.csv and other formats needed for statistical software] will be kept in an IRB-compliant drive provided by ODU. Survey responses will be anonymous unless participants provide contact information for follow-up.

Focus group & interview recordings, forms, transcripts and notes: Several audio recordings (of in-person interviews and focus groups) [.mp3, .wav] and audio/visual recordings (for interviews conducted over Zoom)[.mp4] will be captured throughout the project on password-protected devices; recordings will be uploaded to secure data storage in the IRB-compliant drive as quickly as possible and the original recording deleted from the device. Any notes [.doc, .pdf] taken digitally during the focus groups or interviews will also be uploaded to the IRB-compliant drive. Transcripts of recordings [.doc] will be kept in the same drive. No other personally-identifiable information will be kept with recordings, transcripts, or notes unless participants request acknowledgement. Participant consent forms will be kept separately in the drive (if digital)[.pdf], not linked to research data, and deleted no later than two years after the end of the project.

Data analysis results: Quantitative survey data will be analyzed using SPSS, with file outputs in various formats [e.g., .csv]. Qualitative data and transcripts will be analyzed using NVIVO, with file outputs in various formats (e.g., .doc, .csv). Both NVIVO and SPSS software are provided by ODU. Draft analysis results will be stored in the IRB-compliant drive, not linked to personal information unless by participant request.

STAKEHOLDER REPORTS AND FEEDBACK

Advisory Board: We will solicit feedback from the advisory board twice each project year through both written comments (left on working documents hosted in OneDrive/Sharepoint or sent by email) [.pdf, .xls, .and .doc] and verbal discussion (recorded in Zoom meetings)[.mp4]. The drafts, working documents, and reports [.pdf, .xls, .doc] for the board to review will be in a separate OneDrive/Sharepoint folder with non-sensitive information, for this purpose. Feedback from the board will also be kept in the same folder.

Other stakeholder groups: At the end of each project year, the PI will examine the research data collected, data analysis results, stakeholder feedback, and results analysis then prepare a summary progress report [.pdf] to share with project stakeholders; this report will be kept in the OneDrive/Sharepoint space. Twice each project year, the PI will prepare a summary progress report [.pdf] (compared against the proposed Schedule of Completion) to share with stakeholders; the report will be kept in the same location. Finally, we will conduct focus groups and/or workshops at least once during each project year with participant stakeholder groups (faculty and practitioners) that may generate additional feedback on the project progress and results [.mp3, .mp4, .doc, .pdf]; any such feedback will be stored in the IRB-compliant drive.

BEST PRACTICE RECOMMENDATIONS, CURRICULA GUIDELINES, AND FRAMEWORK

Results of the research analysis will be synthesized into best practice recommendation documents [.pdf] for LIS faculty and for IL instruction practitioners. Similarly, curricula guidelines and suggestions will be developed and shared in documents [.pdf] for LIS faculty. The resulting IL and IL instruction framework will be shared in publications and in a high-level summary document [.pdf].

WORKSHOP AND WEBINAR SLIDES AND RECORDINGS

PIs will present findings, recommendations, and guidelines at in-person workshops and online webinars. Slides for all presentations [.pdf., .ppt] will be created and shared. Online webinars via Zoom will be recorded [.mp4].

Embracing the whole SELF

PUBLICATIONS AND WEBSITE

This research will generate multiple publications in peer-reviewed journals [.pdf]. The PIs will collaborate with ODU's Information Technology Services to create and maintain a website (HTML) that is supported by ODU's institutional repository to host information related to the project.

AVAILABILITY

We will make the above digital products available in the following ways:

RESEARCH DATA

Survey and interview instruments: The finalized survey and interview instruments will be shared in publications reporting the project results. The instruments will also be available on the project website. *Online survey data*: After review and removal of any sensitive or personally-identifying information, the survey result datasets will be made available through ODU's data repository. *Focus group & interview recordings, forms, transcripts and notes*: None of the following will be made available to the public: video and audio recordings, notes taken by the team during interviews, or consent forms. After review and removal of any sensitive or personally-identifying information, interview transcripts will be made available through ODU's data repository as possible. *Data analysis results*: Finalized data analysis files (both quantitative and qualitative) will be made available to the public through ODU's data repository. Raw and draft data analysis results will not be shared with the public.

STAKEHOLDER REPORTS AND FEEDBACK

Advisory Board: No detailed feedback or recordings will be shared with the public (unless the board chooses to do so). Summaries and reports will be shared on the project website and integrated into some publications.

Other stakeholder groups: After review and removal of any sensitive or personally-identifying information, transcripts and summaries of stakeholder feedback may be made available through ODU's data repository.

BEST PRACTICE RECOMMENDATIONS, CURRICULA GUIDELINES, AND FRAMEWORK

Best practice documents for LIS faculty and for IL instruction practitioners will be shared on the project website. A white paper for practitioners will also be shared with the AASL. Similarly, curricula guidelines and the IL and IL instruction frameworks will be publicly shared on the project website. All of these documents and their location will be discussed in conference presentations/workshops, journal publications, and online webinars.

WORKSHOP AND WEBINAR SLIDES AND RECORDINGS

Notes generated to share from in-person workshops and recordings from online webinars will be available on the project website. Slides for all presentations will also be available on the website.

PUBLICATIONS AND WEBSITE

All publications in peer-reviewed journals will be available through ODU's and TWU's institutional repositories for faculty. The website will be accessible to web browsers and meet WCAG 2.2 accessibility standards.

ACCESS

As discussed above, no sensitive data will be available for public access and personally-identifying information will only be available with participant permission. No draft documents or draft analysis will be available. Finalized products made available that are generated by or about the advisory board feedback will be covered under the Creative Commons CC BY-NC-ND (non-derivative) 4.0 license to protect the integrity of the board's identity and contributions. All other digital products listed above that are available through the project website or ODU repositories will be licensed under Creative Commons CC BY-NC-SA 4.0 and available to adapt.

SUSTAINABILITY

ODU's digital and data repositories are facilitated by the ODU Libraries, who are committed to long-term preservation and ensuring accessibility to a global audience; to the greatest extent possible, copies of all products will be kept there. The project website will be supported by ODU ITS, who maintain long-term preservation. The PIs will manage and update the website for a minimum of two years after the project; the website will remain available to the public and ODU ITS even when no longer updated. All products that are not made publicly available will be destroyed no later than two years after the end of the project.

Embracing the whole SELF

Data Management Plan

INTELLECTUAL PROPERTY RIGHTS AND PERMISSIONS

The project PIs and other stakeholders (e.g., participants, board members, graduate assistants) will hold ownership of intellectual property rights as appropriate for authorship of the product, through Creative Commons licensing (see below). This includes new data and new digital products. There is no proprietary or patentable data expected. No sensitive data will be shared for public access and personally-identifying information will only be available with participant permission. No draft documents or draft analysis will be publicly shared, as is common in research projects and not required by ODU or IMLS. Any finalized products that are made publicly available that are generated by or about the advisory board feedback (e.g., reports, summaries) will be covered under the Creative Commons CC BY-NC-ND (non-derivative) 4.0 license to protect the integrity of the board's identity and contributions; the project PIs and board members will hold ownership. Any copies of publications that are housed in the ODU digital repository will be subject to the copyright stipulations of the publisher. All other digital products (e.g., data, datasets, reports, documents, recordings, guides) that are available through the project website or ODU repositories will be licensed under Creative Commons CC BY-NC-SA 4.0 and available to adapt; the project PIs and other stakeholders (e.g., participants, graduate assistants) will hold ownership as appropriate for authorship of the product. These licenses will be on the project website, digital repository information, and attached to the products themselves wherever possible.

DIGITAL CONTENT, RESOURCES, OR ASSETS

DESCRIBE THE DIGITAL CONTENT, RESOURCES, OR ASSETS YOU WILL CREATE OR COLLECT

Please see the Digital Products Plan.

LIST THE EQUIPMENT, SOFTWARE, AND SUPPLIES THAT YOU WILL USE TO CREATE THE DIGITAL CONTENT, RESOURCES, OR ASSETS.

Both surveys will be distributed through the Qualtrics software provided by ODU. All online survey response data will be collected within Qualtrics. Zoom (provided by ODU) will be used to conduct online interviews, hold meetings with the research team and other stakeholders (e.g., advisory board), and host webinars. Both NVIVO and SPSS software are provided by ODU and will be used to analyze qualitative and quantitative data. The following will be created and kept in Microsoft OneDrive/Sharepoint, provided by ODU: drafts and copies of survey and interview materials/instruments; drafts, working documents, and reports for the advisory board and other stakeholders to review; drafts of best practice recommendations, IL and IL instruction frameworks, and curricula guidelines; presentation slides and materials; and feedback from the board. Once complete, the final practice recommendations, frameworks, curricula guidelines, presentation slides and report materials will be available on a website designed by PIs in collaboration with ODU's Information Technology Services. ODU provides guides and support for Wordpress to develop webpages.

LIST ALL THE DIGITAL FILE FORMATS YOU PLAN TO USE AND JUSTIFY THEM.

DOC/X, TXT, PDF, XLS, CSV, PPT, MP3, WAV, MP3, MP4, HTML, NVP/X, SAV/SPV/SPS, QSF. Microsoft Office Suite products and file formats [.doc, .xls, .ppt] are widely used within higher education, and are supported through licensing by the institutions (ODU and TWU). ODU additionally recommends the use of the business-licensed Microsoft OneDrive for faculty collaboration using moderately-sensitive data. Using Sharepoint to collaborate on these documents is more convenient than using other formats and is within responsible data expectations. Certain file formats work well or must be used with the analysis softwares NVIVO and SPSS, which are provided and supported by ODU. The recording formats of .wav, .mp3, and .mp4 are standard for recording across many platforms and readable by many platforms and services. Wherever possible, more accessible formats such as .pdf, .txt, and .csv will be used for public sharing of the products.

DESCRIBE YOUR QUALITY CONTROL PLAN. HOW WILL YOU MONITOR & EVALUATE YOUR WORKFLOW AND PRODUCTS?

At the end of each project year, the PI will examine the research data collected, data analysis results, stakeholder feedback, and results analysis then prepare a summary report to share with the advisory board and other project stakeholders. Each quarter, the PI will review the data collected, data analyzed, and outcomes generated to assess the fit between our proposed Schedule of Completion and actual activity completion dates. Twice each project year, the PI will use their analysis of the data collected, data analyzed, and outcomes generated to prepare a summary progress report (compared against the proposed Schedule of Completion) to share with the advisory board and project stakeholders.

DESCRIBE YOUR PLAN FOR PRESERVING AND MAINTAINING DIGITAL ASSETS DURING AND AFTER THE AWARD PERIOD.

The IRB-approved data storage drive provided by ODU is maintained by ITS and Research Data Support Services; it is designed for long-term storage and retention. Drafts and working data under analysis will be kept in the drive until the end of the project, when final copies of products to be publicly shared will be entered into institutional repositories. All products that are not made publicly available will be destroyed no later than two years after the end of the project. ODU's digital and data repositories are facilitated by the ODU Libraries and ODU Information and Technology Support (ITS), who are committed to long-term preservation and ensuring accessibility to a global audience; to the greatest extent possible, final copies of all products will be kept in these repositories. A read-me file will be included to provide necessary context about the dataset(s). Metadata and descriptions will also be structured with the assistance of the repository staff (to conform to a standard template and consistent with repository

standards) and provided on the repositories. The project website will be supported by ODU ITS, who maintain long-term preservation. The PIs will manage and update the website for a minimum of two years after the project; the website will remain available to the public and to ODU ITS even when no longer updated. Any necessary documentation for products on the website will be included. This DMP will be shared with the institution.

RESEARCH DATA

IDENTIFY THE TYPE(S) OF DATA YOU PLAN TO COLLECT OR GENERATE.

Please see the Digital Products Plan.

DOES THE PROPOSED DATA COLLECTION OR RESEARCH ACTIVITY REQUIRE APPROVAL BY THE INSTITUTIONAL REVIEW BOARD?

Prior to any participant recruitment, PIs Simons and Burns will submit the project for review to the ODU IRB during August of 2024. PI Elkins will also go through TWU's IRB approval process for the project. The ODU MLIS GA will also be required to undergo human subjects training and be added to the IRB approval before beginning any IRB-covered tasks (i.e., data collection and analysis).

WILL YOU COLLECT ANY SENSITIVE INFORMATION?

This project will involve only minimal sensitive information related to participants' everyday work and education experiences. Survey responses will be anonymous unless participants choose to provide contact information for follow-up. Interview and focus group participant consent forms will be kept separately in the drive (if digital)[.pdf], not linked to research data, and will be deleted no later than two years after the end of the project. Draft analysis results will be stored in the IRB-compliant drive, not linked to personal information unless by participant request. No other personally-identifiable information will be kept with recordings, transcripts, or notes unless participants request acknowledgement. Audio recordings (of in-person interviews and focus groups) and audio/visual recordings (for interviews conducted over Zoom) will be captured throughout the project on password-protected devices; recordings will be uploaded to secure data storage in the IRB-compliant drive as quickly as possible and the original recording deleted from the device. Only direct research project team members (PIs and Graduate Assistant) will have access to the secure storage drive. The PIs will review and remove any personally-identifying information from all datasets and reports before making these products publicly available. In the case that individual identifiers are used, they will be anonymized (unless the participant indicates on the consent form that they wish to be acknowledged).

WHAT TECHNICAL (HARDWARE AND/OR SOFTWARE) REQUIREMENTS OR DEPENDENCIES WOULD BE NECESSARY?

To retrieve and display: contemporary operating system capable of running software, downloading files and browsing the web; Web browser to access the digital repository and/or project website and download files; Software that can open .doc, .txt, .pdf, and/or .csv files. For new data analysis, software such as NVIVO or SPSS would be needed.

WHAT DOCUMENTATION WILL YOU CAPTURE OR CREATE ALONG WITH THE DATA? WHERE WILL THE DOCUMENTATION BE STORED AND IN WHAT FORMAT(S)? HOW WILL YOU PERMANENTLY ASSOCIATE AND MANAGE THE DOCUMENTATION WITH THE DATA?

See other sections for details about consent agreements, data analysis notes, and metadata. Any codebooks will initially be developed with the data analysis software and (as needed) in separate files in the IRB-approved storage drive; finalized codebooks will be made available and attached to the data in the institutional repository.

WHAT IS YOUR PLAN FOR MANAGING, DISSEMINATING, & PRESERVING DATA AFTER COMPLETION OF THE PROJECT?

All data and products that are not made publicly available will be destroyed no later than two years after the end of the project. Please see other sections for details on our use of the project website, institutional repositories, and storage drives to manage and preserve data and digital products. PIs will present findings, recommendations, and guidelines at in-person workshops, online webinars, and publications; these dissemination venues will provide opportunities to share the location of publicly-available data and digital products.

IDENTIFY WHERE YOU WILL DEPOSIT THE DATA.

Institutional Repository: ODU Digital Commons: https://digitalcommons.odu.edu/ https://guides.lib.odu.edu/ir

WHEN WILL YOU REVIEW THIS DATA MANAGEMENT PLAN? HOW WILL THE IMPLEMENTATION BE MONITORED?

PI Simons will review this DMP twice each project year by 1) assessing current data collection, organization, analysis, and storage procedures across all team members and in all planned data locations, 2) comparing the current procedures against this plan, 3) determining if and how procedures may need to be changed either to comply with the DMP or in response to new variables, and 4) preparing a brief summary report of their findings and sharing it with the team. PI Simons will follow up with each team member to ensure that they have understood the report and are complying with any changes recommended.