Public Library Data Alliance (PLDA)
Memorandum of Understanding
For PLDA Formative Stage

BETWEEN:

- American Library Association, 50 East Huron Street, Chicago, IL 60611, USA [ALA]
- Association for Rural and Small Libraries, 5300 Lakewood Road, Whitehall, MI 49461, USA [ARSL]
- Chief Officers of State Library Agencies, 201 East Main Street, Suite 1405, Lexington, KY 40507, USA [COSLA]
- National Information Standards Organization, 3600 Clipper Mill Road, Suite 302, Baltimore, MD 21211, USA [NISO]
- Public Library Association, 50 East Huron Street, Chicago, IL 60611, USA [PLA]
- Urban Libraries Council, 1333 H Street NW, Suite 1000, Washington, DC 20005, USA [ULC]

hereinafter, referred to individually as 'Party' and collectively as 'Parties' or 'Alliance' and relating to the effort entitled 'Public Library Data Alliance', hereinafter referred to as 'PLDA'.

WHEREAS:

The Parties agree to form and work together in an alliance named 'Public Library Data Alliance' [the 'PLDA'].

The PLDA will seek to advance public library data gathering and data use that aligns with community needs.

The PLDA has arisen from the Measures that Matter [MtM] initiative, which began in 2016 as an effort led by the Chief Officers of State Library Agencies [COSLA] with the participation of other Parties and with funding from the Institute of Museum and Library Services [IMLS]. The underlying goal of MtM was to examine, evaluate, and map the landscape of public library data collection in the United States. The resulting report of that initiative[1] was published in April 2018 outlined four primary outcomes: a Data Landscape Document, Educational Webinars, a Data Summit and this Action Plan. COSLA led a phase two, Implementation group to a follow-up and act on elements of that Action Plan. One recommendation, which the implementation group developed a roadmap for was the creation of the Public Library Data Alliance, with supporting documentation for the creation of that group. The report of the Implementation Group has been distributed to Parties to this agreement[1].

The PLDA is not intended to duplicate existing bodies, such as IMLS's Library Statistics Working Group (LSWG) or PLA's Measurement, Evaluation, and Assessment Committee (MEAC). Instead, it was conceived to provide thought leadership, propose strategic actions, and create a communications infrastructure for the field.

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[1] https://measuresthatmatter.net/actionplanlive/

As a new alliance, the scope and the work of the PLDA may expand or contract based on the shared vision of the Parties and based on the success of the PLDA in its initial launch. As such, this MOU shall serve as a governing model for the PLDA during this formative stage, defined as a concrete period of 12-to-18 months, after which a more robust agreement among the parties is envisioned, or alternatively this MOU may be extended or revised as deemed appropriate by the Parties.

This MoU sets out the terms under which the Parties shall work together to implement the PLDA based on the MtM Implementation Group recommendation in its formative stage.

This MoU is not intended to be construed as legally binding on the Parties, but as a guide to good faith dealings between the Parties.

Mission Statement

The Mission Statement of the PLDA is as follows:

The Public Library Data Alliance provides thought leadership to advance public library data gathering and use so that libraries can continuously improve their services to align with community needs. The Public Library Data Alliance engages diverse stakeholders to propose strategic actions around data that reflect the role and impact of public libraries at the local, regional, state, and national levels.

Short- and Long-Term Priorities

The Proposed Short- and Long-Term Priorities identified by the Implementation Group of MtM are outlined in Appendix 1 of this MOU. These shall be the initial action items of the PLDA but may be revised as agreed by the Parties during the formulation period.

Secretariat

The responsibility of the Secretariat is to ensure the integrity of the Public Library Data Alliance's efforts. The Secretary will do the following:

a. Track member attendance, working with the Nominating Committee and Co-Chairs regarding any issues.
b. Disseminate minutes and a record of decisions the Public Library Data Alliance has approved by vote and maintain such documentation for reliable and rapid recovery.
c. Ensure all approved action items are owned by a committee or member and have explicit due dates.
d. Schedule action item closure into meetings aligned to due dates.
e. Maintain the calendar.
f. Maintain a list of potential additional stakeholders to provide input into the overall work.
g. Maintain member conflict-of-interest documentation

<u>Intellectual Property</u>

Any trademarks, domains, or other intellectual property registered for the purposes of the PLDA or related efforts shall be held by the registering Party while a signatory to this MoU. Should a Party leave the PLDA, any such trademarks, domains, or other intellectual property necessary for the ongoing functioning of the PLDA shall be transferred to one of the continuing signatories as agreed by the continuing PLDA members.

The Parties contributing intellectual property developed as an effort of the PLDA shall make these outputs freely and publicly available under a CC-BY-SA license with copyright held by one of the Parties. All relevant code developed by the effort will be released as open source under the terms of a suitable licence, e.g., the 2-clause BSD license, or similar.

a. Resource commitment

Parties agree to provide sufficient resources to meet the deliverables defined for each responsibility area as follows:

NISO – Secretariat operational support for 12 months.

b. No financial obligation

Unless the Parties mutually agree otherwise in writing, each Party will be responsible for its own costs, fees, and expenses (including all costs, fees, and expenses of its agents and representatives) incurred in connection with the activities contemplated by this MoU.

c. Entry into force

An entity becomes a Party to this MoU upon signature of this MoU by a duly authorised representative.

This MoU shall have effect from the date of signature by at least two parties.

d. Duration and Termination

This MoU shall remain in effect for the duration of formative stage, defined as a concrete period of up to 12 months, which is anticipated to run up until 30 September 2020.

A party may leave the PLDA with a minimum of two (2) months' notice.

Any Party that withdraws from the PLDA agrees to cooperate with the remaining Parties to conclude its participation as smoothly and efficiently as possible. This includes the timely handover of all relevant documentation and transfer of relevant intellectual property per Section 3.a. "Intellectual Property", which will not be unreasonably withheld. The Party agrees to make its employees available to complete these formalities during the notice period.

The duration of this MoU may be extended by written agreement of the Parties, for such period or periods as are deemed appropriate by the Parties.

Should the formulation stage prove successful, the Parties confirm that it is their intention to work together to form a more formal partnership or alliance with responsibilities for the long-term provision of, and support for, the PLDA and its associated activities moving forward.

e. Relationship Between Parties

Nothing herein shall be construed to create a legally binding relationship, agency, or joint venture between the Parties. Neither Party will hold itself out as being part of, controlled by, or acting on behalf of the other Party.

f. Liability

Each Party will be responsible for the acts, omissions, and negligence of its own officers, employees, and agents acting within the scope of their respective authority. Nothing in this MOU is or shall be deemed to be a waiver by either Party of any defenses that may be available by law. Neither Party nor its Representatives will be liable to any person or entity, including the other Party, for any direct, indirect, consequential, exemplary, punitive, special, or incidental damages, or damages for lost profits, revenues, or business interruption, arising under or in connection with this MOU or the performance thereunder, even if advised of the possibility of such damages or if such possibility was reasonably foreseeable.

AGREED BY:

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NAME // TITLE // DATE
For American Library Association

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NAME // TITLE // DATE
For Association for Small and Rural Libraries

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NAME // TITLE // DATE
For Chief Officers of State Library Agencies

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NAME // TITLE // DATE
For National Information and Standards Organization

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NAME // TITLE // DATE
For Public Library Association

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NAME // TITLE // DATE
For Urban Libraries Council

Appendix A:

<center>Proposed Short- and Long-Term Priorities</center>

Building on work undertaken by the Implementation Group in its limited lifespan (Fall 2018 – April 2019), the following suggestions are offered as short- and long-term priorities for the PLDA.

Note that in addition to the strategies and tasks described below, among the action plan steps explored in the course of the most recent phase of work, IMLS will continue work on action step 1.1 ("Analyze the Public Library Survey") and COSLA will continue on action step 2.1 ("Review State Added Data Elements") through 2019. Progress will be shared with the PLDA and give the PLDA an early opportunity to model its role as guide, influencer, and central touchpoint for distributed work conducted in support of Measures that Matter.

PDLA Overarching Goals (from the mission)

1. Advances public library data gathering

2. Proposes strategic actions around data that reflect the role and impact of public libraries at the local, regional, state, and national levels

PLDA Strategies and Tasks to Achieve Goals

Below is the primary short-term priority that the PLDA should take on in its first year of existence to help create buy-in among the library field and demonstrate its value.

Priority One: Create a communications infrastructure that aims to engage and share resources with the library field. This priority will allow the PLDA to fulfill the Measures that Matter Action Step Number 4: *Meet the Educational and Information Needs of Data Users Inside and Outside of the Library Field*. The communications infrastructure will address all action steps except 4.3 as this initial phase of communication is about cementing PLDA's foundation and engagement with key stakeholders. Once more mature, 4.3 can be addressed and this step will help to lay that groundwork.

Principles to guide the development of the communications infrastructure include:
- Identifying infrastructural and organizational assets from COSLA, NISO, PLA, IMLS, etc. to move this forward
- Leveraging existing channels, methods, and contacts with the intention of growing awareness, buy-in, and participation of the broader field
- Creating the value proposition and help the field understand how data helps makes choices with communities

- Establishing a participatory landscape rather than a mandated one in shaping data gathering efforts. The PLDA will need to determine methods by which it will continually collect stakeholder and funder input on its work.
- Collecting and disseminating 'best practices' examples of libraries using data to inform their programming and to assess their impact in local communities across each of the 'focus areas'. This could lead to the creation of a community-driven case study database.

- Identify how to communicate library data with policy makers, community leaders, journalists, etc.
- Determine mechanism(s) to record, retain, and make accessible its institutional knowledge.

Potential resources that can be developed and shared as a result of this activity include resource toolkits, conference presentations, an easy-to-access dashboard of existing data tools (Project OUTCOME, RIPL, SPR) and any other products that are easily distributed and maintained.

Priority Two: Continue prioritizing work around use case studies, which was explored through two working groups during the Implementation Group phase of Measures that Matter. A working group related to Action Step 4.2 began to develop participatory, purpose-driven use cases to address the needs of policymakers, advocates, library leaders, and stakeholders. It made initial inroads in 1) defining use-case study criteria, 2) soliciting/collecting and then curating/making accessible initial use case studies, and 3) beginning to identify and refine users-audiences/stakeholders beyond general categories to understand multiple uses and value from diverse lenses beyond those already known. Another working group related to Action Step 2.3 addressed community impact and ways that libraries are helping move the needle on community-wide issues. Part of its charge was researching methods and approaches for linking library contributions to community outcomes using existing cases within the field and other relevant sectors. Additional work on use case studies is needed.

Long-term priorities: While some of these recommended activities may naturally start to arise in the carrying out the communications strategy, these items are more complex and will require the right ground setting and buy-in to meaningfully execute.
- Identification of critical gaps in existing data collection requirements
    - Recommend and support the development of a process to collect critically important data that are currently not collected elsewhere.
- Connect library data with community data to not only demonstrate success but show impact and scale
    - Research and share approaches for linking library data to community outcomes so that the field can better communicate its value, continuously improve and align with community needs.

- o Identify and work with community data experts to determine at least five accurate sources for community data so that libraries can more easily demonstrate impact
  - o Develop Continuing Education for Current Library Workers and implement RIPL in a box, size of libraries, measurable learning
- Facilitate field-wide consensus for data that all libraries should collect related to their services and activities.
- Proposing at least one new nationwide indicator focused on community impact with case studies demonstrating use
- Facilitate the "sunsetting" of at least one lower-value data element/metric for reporting, thereby clearing space for more strategic community outcomes
- Get all relevant parties (e.g. PLDS, PLA, ULC, etc.) to commit to reducing as much duplication in their current data processes and elements as possible, leveraging the findings from action 2.1's report
- Assess the data literacy needs of library workers and LIS students/curriculum.
- Influence LIS programs to include awareness and a working knowledge of existing public library collection efforts in courses designed for students in public library specialization. Ultimately, this could initiate shaping LIS curriculum to focus on more real-world data methods
- Facilitation of field-wide consensus on those areas where library activities are likely most impactful in their local communities. PLDA could identify at least three promising practices for libraries to demonstrate impact with as much specific guidance as possible so that libraries can implement quickly
- Technical assistance to support individual libraries' collection and use of data to inform their programming and assess community impact.
- Start to centralize existing library data into an easily accessible database and visualization platform. Principles to collate existing data include:
  - o Leverage existing work done by COSLA and IMLS
  - o Reduce time and effort for participating libraries to enter required data (and access peer/comparator data) by advocating for streamlined data elements and process,
  - o Develop more standardized/shared definitions and guidelines
  - o Increase confidence in reported data and make peer comparisons more accurate and timely
  - o Help to identify the gaps in existing data collection requirements