It Takes a Village Instructional Designer
Request for Proposals

Overview

LYRASIS is seeking proposals from an experienced instructional designer to evaluate and iterate on a set of tools created to help open source software programs serving cultural and scientific heritage become more sustainable.

Work on this grant-funded project will take place between September 2020 and December 2022; we expect the Instructional Designer to devote 20-25 non-continuous days to the project during that time frame.

Introduction and Background

The *It Takes a Village* (ITAV) project was funded in 2017 by the Institute of Museum and Library Services (IMLS) to bring together open source programs serving cultural and scientific heritage to develop shared sustainability strategies, and to provide our communities with the information needed to assess and contribute to the sustainability of the programs they depend on.

The core output of the initial project was a Guidebook designed to serve as a practical reference source to help open source software (OSS) programs plan for long-term sustainability, ensuring that commitment and resources will be available at levels sufficient for the software to remain viable and effective as long as it is needed. The Guidebook is freely available online via https://www.lyrasis.org/itav.

It Takes a Village divides OSS sustainability into four facets - governance, technology, resources, and community engagement - each of which contains three phases - getting started, growing, and stable but not static. The Guidebook provides "moving forward" recommendations for each phase and facet, helping programs determine the best way to improve their sustainability.

Purpose, Description, and Objectives

We recently received a second round of funding from IMLS to turn the Guidebook into a dynamic, flexible suite of tools and resources called *ITAV in Practice*. The proposed suite of tools will be designed around processes and exercises that enable stakeholders in OSS programs to assess the facets of sustainability and determine the current and desired phases for each. *ITAV in Practice* will then lead users to tools (templates, models, checklists, etc.) and resources (case studies, examples, readings, etc.) to identify sustainability strategies, develop plans, and measure results. All *ITAV in Practice* materials developed will be freely accessible via a wiki under a Creative Commons license.

The core goal of the program is to develop a set of tools that is:

● flexible to accommodate the diversity of OSS programs; agile to enable OSS programs to set priorities within and among facets;
● easy to use, edit, and share within a community-based planning process;
● approachable to make sustainability planning easy to start and maintain
● with outputs that are clear to participants; and
● accessible to users in line with Web Content Accessibility Guidelines (WCAG)

Content development for *ITAV in Practice* will start at four one-day workshops (starting online, and moving to in-person as public safety allows), one for each facet. The workshops will be attended by the ITAV Co-Directors, a professional facilitator, a member of the ITAV Advisory Group, the instructional designer, and up to eight representatives of OSS programs with expertise in the facet.

Following the meetings, the program Co-Directors will create draft tools for that facet with the assistance of the ITAV Advisory Group. The draft tools will be reviewed by the instructional designer and meeting participants and tested with two OSS programs who have agreed to provide immediate evaluation and feedback around the draft tools. Feedback on draft tools will be gathered and tools revised prior to release in beta version for other OSS programs to use. We have also engaged a graphic designer who will assist with overall look and feel for the tools and ITAV identity.

Deliverables and Timeline

● Virtual and In-person meetings (September 2020 - August 2021)
  ○ Planning session with project Co-Directors and workshop facilitator
  ○ Participate in four virtual/in-person workshops, one for each ITAV facet. Workshops will be one day long each, and will all be held in the continental US; tentative locations if we are able to hold in-person events include Atlanta, Boston, and San Francisco.
● *It Takes a Village in Practice* Tool Assessment (December 2020-December 2022)
  ○ Evaluate and iterate on tools and wiki developed by Co-Directors and Advisory Group, ensuring that:
    ■ Tools (e.g. checklists, questionnaires, open-ended questions, group exercises, etc.)use the appropriate methods to guide users to the desired outcome
    ■ Tools have appropriate instructions and provide alternative methods for users in differing circumstances
    ■ Wiki design supports self-learning and adaptation for users

- ■ Wiki enables users to both learn about sustainability in general and evaluate their own program
- ■ Materials are accessible for all users (in concert with graphic designer)
- ■ Samples of exercises currently used by the ITAV program team can be provided on request.

Submission Requirements

- Name and contact information
- Resume
- Statement regarding approach and methodology
- Statement of experience on similar projects, including links or sample of work and contact details for two references
- Cost breakdown, including time for planning and tool assessment
    - ○ Proposed budgets should aim to fall within the amount budgeted for an instructional designer in our grant: $25,000-$35,000
    - ○ Travel costs, if we are able to hold in-person meetings, will be reimbursed and do not need to be estimated/included in the overall budget

Contact Information

Please direct all responses and questions via email to: Megan Forbes, Co-Director, It Takes a Village, megan.forbes@lyrasis.org. Please submit questions by **September 18th**, and final proposals no later than **October 9th, 2020**. We anticipate making a selection by the end of October, and a contract will be established with the selected candidate at that time.