Copyright Education in Libraries, Archives, and Museums
A 21st Century Approach

A Summary Report of Roundtable Discussions at Columbia University Libraries held on July 11-12, 2019

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Introduction

On July 11-12th, 2019, with the generous financial support of the Alfred P. Sloan Foundation, and together with project partners Ithaka S+R and LYRASIS, Copyright Advisory Services at Columbia University Libraries held roundtable discussions as a second phase of research to determine how to structure and implement a professional development copyright education initiative for cultural heritage professionals working in libraries, archives, and museums. In particular, the purpose of these discussions was to examine whether there might be a way to create and deliver copyright education to audiences within this sector that is scalable, financially sustainable, advanced in subject matter, and responsive to both evolving audience needs and to legal and technological change. Roundtable participants were chosen because of their significant copyright expertise, their diversity and inclusive points of view, and their contributions made to copyright education in the sector.

The roundtable discussion was premised on existing research already completed on the subject and referred to in this report as Phase I research, carried out by Rina Elster Pantalony, Director of Copyright Advisory Services, Columbia University Libraries, with the generous support of a Catalyst Fund Grant from LYRASIS. *The Feasibility Study on the Creation of a Virtual Center for Copyright Education for Professionals in Libraries, Archives and Museums* was published in 2018 by Columbia University Libraries and LYRASIS.[1] Roundtable participants were required to review the 2018 report in anticipation of discussions. **After significant quantitative survey results and qualitative research, it was concluded in the 2018 report that audiences were ready for and overwhelmingly favored the creation of a virtual copyright education center that both supported them in their day-to-day work with collections and the management of copyright issues and provided them with educational opportunities, whether in person or online.** Based on the recommendations flowing from the 2018 report, the roundtable discussions were held as a way to jump start a key stakeholder group whose purpose it was to examine the issues surrounding copyright education for the sector in greater detail. The agenda for the roundtable is attached in Appendix I to provide readers with the list of topics identified for discussion.

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[1] Kristen Kelly and Rina Pantalony, *The Feasibility Study on the Creation of a Virtual Center for Copyright Education for Professionals in Libraries, Archives and Museums,* Columbia University Libraries and LYRASIS, January 30, 2018, https://copyright.columbia.edu/content/dam/copyright/Policy%20Docs/Copyright%20Education%20Center%20Feasibility%20Study%20Report-1-1.pdf.

The Context for the Roundtable

The Alfred P. Sloan Foundation approved the grant award based on the following context which also permeated discussions at the roundtable.

Copyright education has been part of the cultural heritage landscape for many years. Notwithstanding, the current need for concerted, strategic, systemic and advanced-level copyright education has never been greater. Three specific reasons indicate why it is now necessary to take a collaborative approach to copyright education in the cultural heritage field:

1. **Consistent practices in documenting and communicating rights and source information surrounding digital materials may result in the democratization of scholarship**. By providing descriptive and rights metadata, scholars are able to access more materials and understand how they may use them. When cultural heritage institutions are able to consistently assess copyright status and permissions or apply fair use on objects and materials in their collections, they provide scholars with an understanding of the potential risks associated with their subsequent reproduction and distribution. And, at the same time, they are also able to provide scholars with an understanding of the integrity of the objects and materials in their collections online through documented source information and the rights related to the materials. These practices may indeed ensure that access is available to all, regardless of the scholars' institutional affiliation, socio-economic status, or geographic location.

2. **Determining the trust and authority of source materials is an ongoing challenge for researchers and readers, particularly online**. Specifically, it is often difficult to discern, with a degree of probability, the reliability of out-of-context materials or materials that have been separated from source and attribution information online. Digital scholarly communications can suffer from the same difficulties when separated from source, provenance, and attribution information. Inconsistent, as opposed to formal and standardized, scholarly rights information practices have developed quickly and organically, likely as a response to the informality of communications in the online environment. And, in other cases, researchers and readers are not using materials as fully as they might due to a fear of rights issues or because of poor or overreaching rights information provided by curators. Thus, in the digital age, researchers are left with a number of questions concerning scholarly communications, authorship, provenance, and context. Where does online material come from? Who created the material? Is it a primary source that can be validated? What can I do with the material and in what context may I use it? Has a library, archive, or museum made curatorial decisions about the collection to provide me with a measure of comfort? Can I share the materials lawfully to meet my academic objectives and disseminate knowledge? Can and should the library, archive, or museum provide patrons and researchers with the tools and capacity to answer questions about re-uses and judge material accurately? Can the materials be used to

support teaching or for research purposes? And finally, who are the authors of the materials and who owns the rights?

One of the most important attributes of a library, archive, or museum is their status as a trusted source and, often, primary source of materials related to scholarship. However, rights information has been secondary in priority when cataloging collections, and libraries, archives, and museums have not created taxonomies and standards until recently. Cultural heritage professionals working with collections online are now expected to communicate source and rights information to their patrons and online audiences as a means of protecting the integrity of source and authorship, as evidenced in the mandatory rights information requirements of the Digital Public Library of America. This is consistent with their mandates as cultural heritage institutions. Thus, cultural heritage professionals working with collections in libraries, archives, and museums are increasingly required to provide their patrons and online audiences with the means to assess the integrity of the materials they post online and the means by which to understand and communicate copyright status. In addition, researchers may also wish to connect with authors and copyright owners to either seek permission to re-use or deepen their understanding of the objects, artifacts, or materials held in collections.

3. **Copyright issues are often at the heart of many preservation and access issues facing patrons and visitors of libraries, archives and museums**. This is particularly true in the context of down-stream uses of materials in a scholarly context. Thus, as scholars communicate their research through various online platforms and communications tools, copyright issues abound. The lines of liability, rights, and permissible and non-permissible uses continue to be tested in an environment that is increasingly complex. Copyright issues are often discussed and advanced as binary, when in fact many issues may be solved through dialogue. This is particularly true in the United States, which has a common-law legal tradition that allows for resolution of legal questions through an iterative and fact-specific process in the courts. Effective dialogue is only possible with adequate education. In order to advance dialogue about complex copyright issues that are evolving in response to rapidly changing technologies, professionals working in cultural heritage institutions require consistent, advanced, and in-depth professional development education in copyright law. In order to find solutions to some of the most problematic preservation and access issues, including potential legislative amendments that assist in solving these issues, professionals working in libraries, archives, and museums need advanced knowledge of copyright law so as to contribute meaningfully to these solutions. They are uniquely placed, understanding patron needs, institutional requirements, day to day limitations and practices, and the missions of their respective institutions. If coupled with advanced knowledge of copyright, professionals in the sector may well discover balanced solutions to some of the most complex preservation and access limitations posed by copyright.

Below is the report that grew out of the discussions at the roundtable. The report has been divided into six sections:

- Audience identification

- An affirmation of need based on mission driven objectives

- The pedagogical model

- The means of education delivery called the service model

- The business model

- Governance

The Audience

At the roundtable, participants spoke at length about the various audiences that would benefit from copyright education within the library, archive, and museum sector. In addition, participants acknowledged that local organizations responsible for community archives and small-to-midsize institutions needed specific assistance since many of them counted on a small staff who were responsible for many of the tasks associated with preservation, access, and community outreach. The group unanimously agreed that the need for greater copyright education is widespread, and some participants wish to cast the widest possible net of potential participants.

Participants also discussed some of the reasons that a more focused audience could be appropriate. Participants recognized that the needs of individuals in different roles could differ, and some participants expressed the view that more value could be provided in sessions that were more finely targeted to the roles and issues specific to their types of institutions. As the 2018 report discussed at length, libraries, archives, and museums--while similar in mission--may carry out their functions distinctly, meaning that copyright issues and risk assessment may also be distinct depending on the nature of the collections and the purpose for which access is provided. Audiences will expect those distinctions to be explored in greater granular detail within the context of copyright education.

Participants considered the benefits of organizing educational offerings in a number of different ways, for example by institution type, by role, or by challenge area. For the latter, we considered a number of possibilities, such as scholarly communication and open access, educational use of copyrighted materials, or primary source digitization.

Participants also recognize that there are members of a potential audience for copyright education who have to date been excluded from other opportunities to gain this

knowledge. For instance, librarians at smaller public libraries and/or at academic institutions that have historically been underfunded such as in many historic black colleges and universities, tribal colleges, or community colleges, face the same copyright challenges as those at well-funded institutions. It is incumbent on the copyright education community to find ways to provide sustainable models of education that are inclusive and accessible to those audiences.

Participants recognized that the "student" for copyright education may not be identical to the customer for a copyright education service. In academic research libraries, for example, an associate university librarian or human resources officer might be the customer in the sense that they are responsible for locating training opportunities for their staff members and librarians. This is an important consideration for sales and marketing of any eventual services. Communications, therefore, will have to be oriented around what problems could be solved, or what solutions or innovations might be developed to help solve barriers experienced by professionals in libraries, archives, and museums carrying out core mission activities.

Finally, as discussions progressed surrounding the development of a copyright education center, another audience type was identified as benefiting greatly: educators, instructors, and copyright experts themselves. Professionals working in libraries, archives, and museums require a sense of community and online collegiality where they can test ideas, learn from others, and gain insight on how to handle copyright issues related to their own specific core mission driven activities. Those who teach in this space require the same level of support, interaction, and collegiality to ensure good pedagogical practice, consistent standards in copyright education, and opportunities to share teaching experiences, curricula, and materials. Thus, audience identification, as an ongoing process for the center, will be nuanced. It is likely that the center will require two distinct views, one for the professional working in a library, archive and museum and the other for the copyright educator. The content in each may sometimes overlap.

The Need

The need for education was discussed in far more granular detail. The copyright educators who participated in the workshop assumed that the need for copyright education was a given, and especially for valid, objective pedagogical practices that do not impose a particular viewpoint or copyright bias. There were a number of different views, however, about the nature of the need. Participants recognized that in order to successfully market and sell a service to customer institutions it would be necessary to provide tangible evidence of value.

Today, there are extensive ongoing efforts to deliver copyright education "101" to individuals. There is no question that there is an audience for this type of program, so much so that the copyright educators in question are in several cases burned out from the individual efforts being undertaken. This copyright professional development work, important as it has been for our communities, has neither had the academic consistency nor has it enabled the scaling of professional development in ways that meet the demand of employers.

Participants' discussions led to the conclusion that economic demand for the larger scale project is not for a general copyright educational program. Rather, the need for a larger scale project in educational opportunities should include copyright policy development, a nuanced understanding of ethical and legal risk, and legal frameworks to enable library, archive, and/or museum employees to make effective decisions supporting their organizations in certain "problem" spaces, explored below. Copyright education is a means to achieve such ends but the value proposition lies in creating the solutions to these difficult problem spaces.

Specific employees of these collecting and educational organizations, such as librarians, archivists, collections managers, registers, curators, and in-house publishers address a number of problem areas on a regular basis. These include, but are not limited to:

- Digitization/reformatting for the purposes of accessibility and preservation

- Primary source digitization to expand discovery and access

- Communicating scholarship online (reproduction and reuse) and open access

- Educational use of copyrighted materials

- Author rights

- Repatriation of rights from publishers

- Intellectual property management for staff and faculty working in the institution

- Rights metadata development and the need for source, author, and rights data associated with online materials

- Related rights issues such as the law of contracts and publicity and privacy rights and how they related to copyright in providing a framework to the US system of moral rights that are part of copyright

- The implications of diversity, inclusion, and decolonization in curating, selecting, and managing materials and collections

- Research data, data sets, and copyright issues related to them

- Licenses and Creative Commons licenses

While there are numerous legal issues present in each of these areas, in many cases they extend beyond copyright law. And, in all cases, there are ethical and risk management considerations as well. Ultimately, institutions need guidance to help them formulate and implement policy to support their operational excellence in one or more of these specific problem areas and to help their patrons better understand the rights issues associated with the objects and materials in their collections.

Put another way, rights literacy is a component of information literacy and a necessary skill in the management, use, and sharing of collections. Access to scholarship can be dependent on copyright literacy. This is increasingly the case when working with materials in the digital space. Copyright literacy is most heavily promoted in a handful of academic libraries who can afford copyright experts on their payroll. This is also true in public libraries, archives, and museums. The purpose of creating the online center is to, in fact, democratize access to both experts and expertise.

Libraries, archives, and museums will recognize the value of sending employees to educational programs focusing on policy matters such as the ones discussed above that will demonstrably enhance the employees' ability to conduct their basic job responsibilities. This organizational value will translate into the availability of professional development resources to support a program.

The Pedagogical Model

Among the copyright educators present at the workshop, perspectives varied regarding which pedagogical models would be most appropriate for copyright literacy. Some felt that there should be a basic sequence of education starting with a foundational grounding in copyright law, followed thereafter by more specialized course offerings. While participants agreed that academically and intellectually this was the most sound approach, they were concerned that a rigid curricular structure might limit the usefulness of the service in a quickly evolving field, thereby lessening demand and impact over time.

Another concern centered upon the disruption of current ongoing efforts by copyright educators working in libraries, archives, and museums. While there are sound efforts ongoing in teaching what was often referred to as "Copyright 101," participants suggested that the best way forward is to build on this programming while giving support, opportunity, standards, and encouragement to those educators who wished to tackle more advanced subject matter. Thus, the purpose of the center will be not to stifle these existing good efforts but instead to collaborate, support, and build upon them.

On that basis, participants agreed that a better approach would be to propose a pedagogical model focused on professional development in the targeted policy problem areas identified in the Needs section above. Participants envisioned a layered approach, creating the means towards professional advancement by identifying modules that allow students to work towards a particular proficiency area, focusing on a single specific "problem area." This pedagogical approach would allow for existing proficient basic course offerings to flourish, whether online or in person, while at the same time providing enough opportunity to create a path forward for copyright students to achieve proficiencies that add value consistent with institutional need.

The Service Model

Existing educators, instructors and experts in copyright servicing libraries, archives and museums have developed various service models for those courses that they already offer. Indeed, participants were chosen because they had the experience of delivering copyright education in distinct--and in some cases unique--ways. To provide greater context, the list of the various courses and their service models for delivery as developed by various participants in the roundtable are available in Appendix II.

After much discussion, three service elements emerged: 1) delivery of the education; 2) the support necessary to reinforce the education once received; 3) the means to support the educators in their endeavors.

In-person workshops, courses, and programs are the current service delivery model of choice. This option remains especially valuable, as evidenced by initiatives already underway, for those institutions selecting a specific professional development track for a group of their employees or member organizations that expect to have sufficient interest in a given program in conjunction with upcoming conference/meeting. In such cases, a team is developed to offer and administer the program, and a faculty teach particular modules that ensure that a basic level of copyright information is conveyed to students attending the workshop.

In-person workshops or courses may also be part of a module of a certification program offered by an organization that supports professionals connected to libraries, archives, and museums. In this case, one or two instructors are required to teach the course in person, sometimes several times a year, depending on enrollment through the supporting organization. Copyright remains a necessary module of professional development courses that in the end result in a certification of expertise.

Finally, another model requires the development of a cohort of regional experts through offering an in-person workshop, using similar approaches in pedagogy, curriculum, and

teaching materials. This could run over the course of several days (like a bootcamp) with a head instructor responsible for leading the workshop and its participants. The cohort of experts, as well as former students in the workshop, remain connected as a collegial unit once the workshop is over to provide each other with support surrounding copyright assessments. The end result could be the establishment of a regional network of participants with a base level of copyright expertise.

In examining these models, participants were concerned about scalability, impact, sustainability, and burn out. While one or two of the initiatives or programs created the means by which students maintained some support network after having taken the course or workshop, none were developing an ongoing and growing, tangible and sustained community where advanced topics might be considered, discussed, and compared. In addition, educators need support to tackle advanced topics and create their own sense of community to discuss and compare pedagogy, advancements, and emerging trends and issues. Given the findings of the 2018 report in identifying audience needs and expectations, particularly in the development of a sense of community, there was a consensus among participants that more needs to be done to evaluate how education is being delivered and what support may exist for those who complete copyright education at different levels and for those who teach in the field. The existing service delivery models are by no means failing, but their impact could increase dramatically if provided with tangible support.

Finally, while programs may include their own teaching materials, there remains a need for an entity to act as an archive, repository, library, and harvester of teaching materials, toolkits, guides and checklists. Collecting these resources and making them available facilitates both copyright teaching and learning, and ultimately the operational implementation of copyright practices within libraries, archives, and museums.

On that basis, participants discussed the use of online learning modules, from either existing sources or created anew, as a way of tackling basic level copyright 101 education and making them a prerequisite for advanced topics. Advanced topics may be suitable for online learning, whether asynchronous or synchronous. In addition, an online space could host Q&A sessions with experts as a means of providing ongoing support after students complete education modules, when they are trying to implement what they have learned. Finally, an online space could host updates in the field, posted by participants, feedback on potential curricula, or advanced topics, and serve as a clearinghouse for where members of the community recommend and post copyright tools and toolkits.

It is likely that in-person workshops and course offerings will always play a role in copyright education and professional development. Participants discussed how beneficial it can be to host copyright workshops and courses in relation to conferences

and meetings held by professional organizations that support the sector. This would be particularly valuable since the educators, the students taking the course, and decision makers in libraries, archives, and museums may all attend these meetings. At the same time, copyright educators and organizations supporting copyright education may choose how, when, what topic, and where in-person workshops and courses can and should be held to ensure that the strategic impact of in-person education is greater. This is, in fact, how discussions on advanced topics about copyright could lead to an evolution practice and developments in advocacy.

The Business Model

As provided for in the 2018 report, it will be crucial to learn from the ongoing programs that can benefit from being scaled, and to move away from the models that did not succeed. Participants, particularly those participants who were senior decision makers, voiced strong opinion calling for a business plan that tests and then settles on a business model that has a strong potential for success. In addition, the model has to meet audience needs as expressed in the 2018 Study.

The following models are currently used in copyright education:

1. **Free in-person education subsidized through grants or through an ongoing programmatic budget committed to by organizations or entities**. In this case, educators or experts give their time and expertise without significant expectation of additional remuneration, and, in effect, their employers are making in-kind financial commitments to the program over and above cost. This is very much an ad hoc approach to long-term funding to support the program, with little regard to the evergreening and archiving of teaching materials. While this approach meets the needs of those seeking copyright education because the education is free, there are definitely questions concerning long-term sustainability. Grant priorities might change over time, and institutional priorities may mean that educators to have less time to donate. While individual courses might still be funded in this manner, the long-term viability of building a copyright education center based on this model is likely unrealistic. That is, while education is "free" to the students who take these copyright education courses, they are not "free" to the institutions supporting the educators, the instructors, and the overhead associated with providing the education.

   Finally, the perception of free education, or free anything, for that matter, is a known and problematic phenomenon. Free educational offerings may be perceived as not being of as much value as offerings that are fee based. It currently works because the educational institutions offering free copyright education and the copyright experts who work for them have stellar reputations. Free courses may also signal to institutional administrators that copyright education and expertise in copyright is not valuable. And nothing can be further from the truth. A copyright education

center would have to build its reputation over time, together with the reputations of those experts that lead and educate, for the center to be able to justify "free" educational offerings. Thus, offering free education from the start is a model that will require in-depth analysis in the business planning stage because of the apparent sustainability issues and the signal that it may send to administrators that copyright education is not to be valued because it is being offered for free.

2. **Copyright education that is fee based, whether by subscription, bulk purchase, or individually priced offerings.** These offerings may be developed as part of a series or even a certification program. While this model is speculatively interesting, it does not take into account critical mass audience necessary to either launch or meet start-up costs. In addition, it ignores elements that form the library, archive, and museum community. Organizations that are launched without anchor to existing members of the community or existing organizations that serve the community have, over time, had difficulties in gaining traction due to their lack of reputation. Libraries, archives, and museums work with trusted partners. It can be difficult to launch an initiative if it remains unaffiliated. In addition, an enormous and sustained communications and outreach initiative would be necessary to attract sufficient traction to ensure success, particularly in the first year or two of operation. Fee based offerings, whether subscription, bulk purchase, or individually priced, would likely only work if the offerings were anchored in the sector in some way or fashion.

3. **Creating a member-based organization is another alternative model**. This model is very popular in the nonprofit sector and indeed in the library, archive, and museum community. In this model, institutions would pay annual dues to support copyright education programming. Programming would be available at no cost or at low cost to members. This model holds some promise, but some member-based organizations appear to be struggling to achieve scale, finding that affordable membership dues are not sufficient to meet costs, especially where content development is required. In addition, the library, archive and museum community may be oversubscribed with too many memberships, creating concern that the time may have past for this model.

4. **An intriguing possibility for a business model lies in creating copyright education center as a benefit for members of existing member-based organizations that service the library, archive, and museum community and where their mandates coincide with the needs outlined in this report**. Infrastructure costs may be lower because these organizations already have structures and online service delivery mechanisms. Their members also align well with copyright education audiences as identified here and in the 2018 report. In addition, membership-based organizations already servicing the library, archive, and museum communities would provide opportunities not only for developing online programming and community support, but also for in-person workshops and courses because they already hold conferences and workshops. Moreover, the need to anchor the copyright education initiative so that it is affiliated with a trusted organization in

the community would be met. However, it will be important to understand what costs may be incurred in achieving critical mass for these education offerings--whether online, in person or both--and how member based organizations might share these costs among each other and with their members. And finally, consideration will have to be given to whether, how, and when learning opportunities may be offered to non-members. This model represents a hybrid of all previous models but will require a business plan so that detailed financial requirements are understood.

As a final note on costs, expertise does cost money. As early as 2001, many copyright experts in the field provided their expertise as a way of giving back to the community. This approach has continued, and the institutions where they are employed have encouraged them to continue teaching. It will be necessary in the course of business planning to understand whether or not this practice will be able to continue and under what circumstances expertise should be remunerated. The issue of remuneration, however, will have to be taken into account as a potential cost over the long term even if incurred in only specific circumstances, such as in, for example, the development of curricular and educational materials.

A Note on the Governance Model

Participants did not spend much time discussing governance since governance will depend on the business model selected. Participants did, however, mention that both an advisory body and a copyright education committee will be necessary to ensure that the copyright education center is able to meet the needs of its customers, audiences, and any member-based organizations it serves. The education committee will be necessary to ensure that education is provided at the level and standards expected of the community it has been created to serve. It may also be necessary to hire an executive director together with a small staff, initially responsible for the day-to-day business, development needs, and coordination of educational offerings.

Next Steps

Two advisory working groups should be established to continue this work: first, an advisory group examining pedagogy and education service delivery, and second, an advisory group examining business models and sustainability. In addition, it is clear that a detailed business plan is now a necessary next step based not only on the findings of the 2018 report but in response to the specific comments of roundtable participants and the outcome of these roundtable discussions. As one participant stated towards the end of discussions: "we need to see the numbers." It is anticipated that working groups will be formed shortly after the publication of this report, with the next phase of work commencing in January 2020.

For more information and to become involved, please contact either Rina Elster Pantalony, Director Copyright Advisory Services, Columbia University Libraries at Rina.Pantalony@columbia.edu or Tom Clareson, Senior Consultant for Digital & Preservation Services, LYRASIS at Tom.Clareson@lyrasis.org.

Appendix I: Agenda for Roundtable

Day 1: Purpose, Objectives, Subject

AM agenda objective: Setting the landscape for discussion by examining both the prior and current copyright education environment for libraries, archives and museums

9:00am -10:30am
- Welcome remarks
- Introductions from project partners Tom Clareson, LYRASIS and Roger Schonfeld, Ithaka S+R
- Roundtable introductions
- Presentation of 2001-2005 copyright workshops known as "Copyright in a Digital Age" (former faculty)

10:30am - 10:45 coffee break

10:45am - 12:30pm
- Presentation of Phase I Research and recommendations
- Roundtable discussion of current initiatives relating to copyright, authenticity and source corroboration, metadata development and copyright data

12:30pm - 1:30pm lunch served in meeting room

PM agenda objective: Examining Subject Matter and Beneficiary Needs

1:30pm - 3:15pm
- Roundtable discussion about the potential of creating an online collaborative and supportive sense of community, development of online and in person workshops, online self help tools, rights and source metadata standards and connecting strategy in curricular development.

3:15pm - 3:30pm coffee/refreshments

3:30pm - 5:00pm
- A discussion of supporting values and potential approaches to managing copyright issues taking into account the distinctions that may exist in practices between Libraries, archives and museums.

Day 2: Implementation

9:00am - noon (with a coffee break based on flow of discussion)

AM Agenda Issues and objective: models of education delivery and identifying sustainability challenges

- A potential franchise model (Dave Hansen)
- Finding a home for the loose network and a community (UIPO members)
- Copyright education as an added benefit to existing member-based organizations
- Hub and spoke model (Kyle Courtney)
- The volunteer approach vs. paid faculty and administration
- Copyright education as an academic subject
- Copyright education as oversight and compliance (Rina)
- The Competitive model--is copyright education a competitive business
- Other models?

Noon - 1:00 pm lunch served in meeting room

1:00pm - 3:00pm

PM Agenda Issues and objective: Examining governance

- The advisory board
- The executive committee
- Liaison with supporting organizations
- Developing the ask for initial seed funding
  - From whom
  - To whom
  - To be reviewed by whom
- Wrap up

Agenda II: Copyright Education Program Summaries[2]

Copyright First Responders System

The Copyright First Responders system was developed by Kyle K. Courtney, Copyright Advisor at Harvard University's Office for Scholarly Communication. The CFR program trains librarians, archivists, museum staff, and other cultural institutional employees in an immersive-style program in the fundamentals of copyright law. The immersive style training creates a decentralized network of copyright expertise across any institutional system and helps establish a culture of shared understanding on copyright issues among staff, faculty, students, and patrons. Its primary mission is to help mitigate risk for the institutions by fully understanding the rights and risks of copyright law. Now in in its sixth year, the CFR system has spread beyond Harvard to reach libraries, archives, and cultural institutions in Alaska, Washington, Oregon, California, Massachusetts, Rhode Island, and Colorado. See more about the CFR system, training, benefits, updates, and current awareness at copyrightfirstresponders.org.

Library Copyright Institute

The Library Copyright Institute is a project to develop a program of systematic, deep instruction in copyright law for librarians. The Institute is specifically targeted at training librarians at institutions with fewer resources and no copyright expert on staff. The premise of the Institute is that we're all better off when the whole library community is widely and deeply engaged with the legal issues that most directly affect our ability to help users. Regardless of your institution, we all need to be able to confidently apply fair use, understand licenses, and assess public domain status. Having fewer resources should not mean that the beneficial rights granted by copyright law are unavailable to librarians, researchers, teachers, and students at those institutions.

The inaugural Library Copyright Institute was hosted from **July 24-26, 2019** at NC State University's James B. Hunt Memorial Library. Thanks to funding from the Institute for Museum and Library Services, there was no registration fee and participants received free lodging and food at the Institute. Travel costs (e.g., gas, mileage) were paid by the participant or the participant's home institution.

This project was created and brought to you by a team of librarians and copyright specialists at Duke University, UNC-Chapel Hill, North Carolina Central University and NC State University. You can read more about the principal investigators and the background of the project at https://sites.duke.edu/librarycopyrightinstitute/about/.

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[2] These summaries were provided by participants in the roundtable.

The Library Copyright Institute is made possible in part by a grant from the Institute of Museum and Library Services (IMLS Grant RE-87-18-0081-18). More information about the Library Copyright Institute can be found at http://library.copyright.institute/.

Society of American Archivists Certificate Programs

The Society of American Archivists currently offers two certificate programs designed to provide archivists and those working in the archives field with the opportunity to expand their skill sets and advance professionally. The Digital Archives Specialist (DAS) Certificate (https://www2.archivists.org/prof-education/das) is designed to provide archivists with the practical knowledge and application tools you need to manage the demands of born-digital records. Approximately 350 archivists have earned a DAS certificate to date. The Arrangement & Description (A&D) Certificate (https://www2.archivists.org/prof-education/a-d) is designed to provide archivists with more in-depth description training to expand on the skill sets achieved in graduate level education, or to support career transitions within the archival field. Curricula in both programs include both foundational and elective courses on copyright and other related legal issues such as publicity and privacy rights. For more information on their programs, see https://www2.archivists.org/prof-education/certificate-programs.

University Libraries Copyright Programs

University copyright programs most often situated in academic libraries have been in existence since Columbia University Libraries introduced its program in 2007. Their primary purpose was initially to assist faculty, students, and library staff in understanding the application of fair use to the re-use of library materials in the course of research, study, teaching, and learning. The focus of many of these programs has since expanded. Representatives from several university copyright programs participated in roundtable discussion. Below, as an example, is a detailed description of the copyright program at the University of Michigan.

For over 10 years, the Copyright Office at the University of Michigan Library has provided a wide range of copyright products and programs. We also provide expertise and education on copyright-related matters like privacy and contracts. From LibGuides to on-campus workshops, we provide on copyright essentials, fair use, permissions, open access, Creative Commons licenses, publishing contracts (journals and monographs typically, with an increase in film, digital humanities, and data matters). We provide one-to-one expertise for faculty, students, and administrators. We help develop policy and procedures related to digitizing collections and preservation matters. Other areas of educational engagement include providing expertise and participation in projects led by others that seek to collaboratively solve problems at scale' leveraging community, such as development of Rightsstatements.org (and related training), the Library Copyright

Institute, copyright matters regarding data preservation for 3D objects in cultural institutions, and the Software Preservation Network.