



LSTA 2023 Grant – Improved Discovery Solutions Joint ILS Consortium Exploration Grant (Competitive grant – estimated grant amount \$50,000)

In 2022, Wisconsin Valley Library Service (WVLS) and Northern Waters Library Service (NWLS) collaborated to engage in a comprehensive joint consortium exploration project to determine value and feasibility of a merger between our two Integrated Library Systems implementations and respective ILS consortia. The project became known as the **Northern Wisconsin ILS Consortium Exploration (NICE)** project.

Funded through state-allocated LSTA funds, the systems hired an outside consultant to manage the process, collect and analyze data, and write a final report. Research completed for this process shows an ILS merger has strong potential to result in an improved patron experience, and there is much to gain from a merger beyond critical financial savings. All data strongly indicate that an ILS merger is feasible between NWLS/NWLN and WVLS/V-Cat. 93% of survey takers supported increased collaboration around the ILS, 53% aligning with a scenario that would see systems purchasing an ILS together, with steps towards sharing practices and policies.

The 2023-2024 grant will take the next steps towards a shared ILS and shared practices and policies.

The goal of the grant is to facilitate next steps toward a merged ILS including the following:

- Develop a mutually agreed upon project timeline
- Determine vendors and products to pursue
- Determine cost of initial migration to a merged ILS
- Determine merged ILS annual budget projections and calculation method for membership shares
- Make decisions on identified issues including delivery, circulation, cataloging, and database standards, and ILS support plan
- Establish timeline for migration including implementation plan, logistics, and steps needed for a merged ILS
- Determine record clean up processes, archiving needs, and contracted technical support necessary for a merged ILS.
- Pursue database and record clean up, and shared ILS adjacent services, such as:
 - Implementation for cataloging utility, re-indexing of records etc.
 - Record clean up and preliminary record matching work for bibliographic and/or patron records
 - Consulting services with ILS vendor to match field names and usage
 - Historical data archiving to minimize data loss with a migration
 - Discovery layer migration implementation
- Establish cultural groundwork, address concerns, and establish communication pathways
- Craft policies and governance structure for cohesive membership and management

Grant funding will enable WVLS and NWLS to hire consultants so the project can be completed in an efficient and timely manner without compromising service to our libraries in the coming year. If WVLS and NWLS do not receive the grant, staff would continue to move through the process, but would not have capacity to move as quickly or be as thorough.

Without grant funds, staff will need to move more slowly through this process. It may result in a significant enough delay to make collaboration no longer feasible due to contract dates and timing. The window of opportunity may close.