

Memorandum of Understanding

This is a Memorandum of Understanding (MOU) between collaborating parties: Wisconsin Valley Library Service, located at 300 North 1st Street, Wausau, Wisconsin 54403 hereinafter referred to as WVLS, and Northern Waters Library Service located at 3200 East Lake Shore Drive, Ashland, Wisconsin 54806 hereinafter referred to as NWLS.

Purpose: WVLS and NWLS agree to take the next steps towards a shared ILS and shared practices and policies.

This MOU is established between WVLS and NWLS to help each other accomplish mutually beneficial objectives (of submitted LSTA 2023 Improved Discovery Solutions Joint ILS Consortium Exploration Project grant):

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.

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 grant will take the next steps towards a shared ILS and shared practices and policies.

Goals of the grant:

Facilitate next steps toward a merged ILS:

- 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

In consideration of the above premises, the parties agree as follows:

Both parties shall:

1. Work cooperatively to maintain an exploration team
2. Follow a mutually determined project timeline and communication plan
3. Both parties will have access to relevant internal documents
4. Encourage member libraries to participate in surveys and ad hoc groups.
5. Both parties will share all relevant fiscal reports

WVLS shall:

1. Serve as fiscal agent for the purposes of LSTA grant funding management

We, the undersigned, have agreed on the contents of this MOU. Any changes must be agreed to by both parties.

Wisconsin Valley Library Service

Signed Maura Depinafski
 Title WVLS Director

Date 8/4/2023
 Date _____

Northern Waters Library Service

Signed Sherry Machones
 Title NWLS Director

Date 8/4/23
 Date _____