

General Information

Fill in the contact information below and answer the pre-application questions. When complete, submit the document to LSTAgrants@dpi.wi.gov by **June 30, 2023**. Please either submit the pre-application file as an attachment to an email, or ensure the submitted file has appropriate viewing permissions when sharing the link.

Project Director Name:

Jackee Johnson

Project Director Phone:

715-685-1075

Project Director Email:

jjohnson@northernwaters.org

Applicant (Library System/Entity to Receive Grant Funds):

Northern Waters Library Service - Agent

Project Budget:

- For standalone ILS joining shared ILS, a maximum of \$25,000 may be requested.
- For Collaborative implementation or feasibility research and planning, a maximum of \$50,000 may be requested for projects involving 2 or more library systems.
- All equipment requests (items that cost \$5,000 or more per-unit) must be pre-approved by the Department of Public Instruction and by IMLS. Contact LSTAgrants@dpi.wi.gov to discuss potential equipment costs by **June 30, 2023**.

Budget Category	Requested Amount	Description of Expenses
Salaries/Wages/Benefits	\$7,500	Coordination of partner meetings and timeline.
Consultant Fees	\$2,500 \$5,000 \$5,000	Consultant to coordinate statewide costs for OCLC as a bibliographic service. Consultant to create shared repository Consultant for bibliographic record automation
Travel	\$	
Supplies/Materials	\$	
Equipment	\$	
Purchased Services	\$30,000	Services for authority vendors, repository platform and Marc Edit training. Repository for shared system standards

Indirect	\$	Allowable other operational expenses
Total Grant Request	\$50,000	

Pre-Application Questions

Please answer the questions below, providing no more than a page for each question. Projects will be evaluated by 3 project reviewers and scored based on the rubric provided in the LSTA 2023 Grant Guidelines document.

Question 1 is to be answered only by those seeking funds for libraries with a stand-alone ILS to join a shared ILS. Question 2 & 3 is to be answered only by those seeking funds for collaborative implementation or feasibility research and planning grants. All grant types should complete question 3.

1. Project Abstract: Standalone to Shared ILS (0-20 points)

Please describe your standalone to shared ILS project in detail. Please be sure to include details on:

- The stand-alone library and shared ILS libraries or system(s) involved in the migration and specific goals of the project
- How the local library will support ongoing participation in the shared ILS, including details about how ongoing expenses will be funded.
- Grant activities and associated expenses. Please illustrate a breakdown of your budget for this project, including Salaries/Wages/Benefits, Consultant Fees, Travel, Supplies/Materials, Services, Equipment*, and other. *See note on equipment in Project Total Request Amount section above.
- Timeline details
- Any other information relevant to your proposed project

2. Project Abstract: Collaborative implementation grants for technical solutions for improved discovery of library collections and resources (0-15 points)

Please describe your collaborative implementation project in detail. Please be sure to include details on:

- Which systems will be involved and the specific goals of the implementation.
- Any additional stakeholders involved outside of system staff (if applicable)
- Grant activities and associated expenses. Please illustrate a breakdown of your budget for this project, including salaries/wages/benefits, consultant fees, travel,

supplies/materials, services, equipment*, and other. *See note on equipment in Project Total Request Amount section above.

- Timeline details
- Any other information relevant to your proposed project

3. Project Abstract: Collaborative feasibility research and planning grants for technical solutions for improved discovery of library collections and resources (0-10 points).

Please describe your collaborative planning and/or research project in detail. Please be sure to include details on:

- Which systems will be involved and the specific goals of the planning or research
- Any additional stakeholders involved outside of system staff (if applicable)
- Grant activities and associated expenses. Please illustrate a breakdown of your budget for this project, including Salaries/Wages/Benefits, Consultant Fees, Travel, Supplies/Materials, Services, Equipment*, and other. *See note on equipment in Project Total Request Amount section above.
- Timeline details
- Any other information relevant to your proposed project

Several library systems would like to continue collaborating in a cooperative cataloging project to identify opportunities to improve patron experience, eliminate redundancies, and unify technical services processes throughout the state. This project would identify opportunities for library collaboration beyond consortium boundaries and create opportunities with vendors.

Systems involved in this collaboration include:

- Bridges Library System (Bridges)
- IFLS Library System (IFLS)
- Milwaukee County Federated Library System (MCFLS)
- Monarch Library System (Monarch)
- Northern Waters Library Service (NWLS)
- Outagamie Waupaca Library System (OWLS)
- Winding Rivers Library System (WRLS)

- Wisconsin Valley Library Service (WVLS)
- Southwest Wisconsin Library System (SWLS)
- South Central Library System (SCLS)

Stakeholders:

- Cataloging and technical services teams spanning 10 library systems
- Library users

Overall goals and objectives:

- Create consistent data, ensuring that all public library catalog users across the state have a more unified experience, accurately finding the titles they seek
- Provide authority vendor services to library systems without an existing relationship
- Prepare for the potential future of a shared, state-wide discovery layer
- Unify technical services processes with a baseline of best practices and/or standards
- Move bibliographic records towards shared/similar vocabularies
- Improved discovery of resources via WISCAT
- Research improved cost structure between library systems and OCLC
- Exploration of other state or consortia standards

Actions and outcomes:

- Establish a statewide bibliographic standards group
- Provide statewide training on the use of Marc Edit to maximize efficiencies in the standardization of bibliographic records
- Creation of shared repository for library systems to share documentation, scripting, workflows and other standards and collaborate on multi-system cataloging projects
- Complete a comparison analysis of each system's bibliographic records to identify differences
- Exploration of improved discovery options with WISCAT staff
- Recommendations for regular database maintenance
- Recommendation for the addition of local subject headings
- Recommendation for the addition of inclusive subject headings
- Create individual vendor-ready maps to add/include local headings
- Create individual vendor-ready maps to add/include inclusive headings

Projected Timeline:

July - September 2023

- Establish statewide bibliographic standards group
- Determine grant cycle meeting schedule and topic timeline. Topics may include: identifying shared vocabularies, database maintenance standards
- Determine statewide bibliographic standards group meeting & decision-making guidelines
- Establish relationship with WISCAT representative
- Recruit consultant to coordinate OCLC statewide cost structure improvements

October - December 2023

- Investigate and schedule statewide Marc Edit training

- Complete backfile work with authority vendors
- Hold monthly bibliographic standards group meetings to work through topic timeline
- Research potential shared repository options for library systems
- Work with consultant to create automated bibliographic processes for interested systems

January - March 2024

- Hold monthly bibliographic standards group meetings to work through topic timeline
- Marc Edit training offered February 5, 2024 - March 3, 2024
- Research and analyze system bibliographic records
- Continue work with WISCAT partners for guidance in improving accessibility through bibliographic improvement
- Continue work on potential shared repository

April - June 2024

- Hold monthly bibliographic standards group meetings to work through topic timeline
- Provide recommendations from bibliographic standards group on database maintenance, local and inclusive headings
- Continue work on potential shared repository

Budget:

Consultant fees \$12,500

- Facilitate of improved cost structure between library systems and OCLC
- Complete a comparison analysis of each system's bibliographic records to identify differences
- Consultant to create shared repository
- Consultant to create bibliographic record automation processes

Purchased services \$30,000

- Establish relationships with authority vendors
- Access to Marc Edit training across the state
- Repository for shared system standards

Salaries/Wages \$7,500

- Grant coordination

4. Equity: (0-5 points)

How will your project help to improve discovery of library resources for historically underserved populations?

Establishing and coordinating best cataloging practices statewide will lay the groundwork for making Wisconsin's public library catalogs more accessible to users: more accurate and consistent descriptions of library resources will increase discoverability of and access to all public libraries' diverse and robust collections. Effective service models will be identified, built upon, and adopted elsewhere, ultimately resulting in more consistent and robust library metadata across the state. Improving metadata will more accurately describe the experiences and content created by those in underserved populations. Improved metadata will also empower those in underserved populations to discover and access relevant library resources more equitably, using intuitive search terms that are inclusive and accurate.

An intentionally inclusive library catalog must diverge from the standard Library of Congress subject headings, which is very time consuming and specialized work. Standardizing some of the practices of Wisconsin cataloging will make locating and replacing or enhancing bibliographic records to incorporate more inclusive language a process that can be shared across consortia. It will allow us to help each other implement automated processes that may be shared among ILS teams.