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HELIN Library Consortium LORI Grant Statewide Digital Repository Project for Rhode Island -- Lyrasis Consulting Proposal

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***HELIN Library
Consortium***

***LORI Grant Statewide
Digital Repository
Project for Rhode Island
-- Consulting Proposal***

Submitted March 12, 2014

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Executive Summary

LYRASIS is pleased to propose the following services to assist the HELIN Library Consortium of Rhode Island in the planning for implementation of a Statewide Digital Repository.

Specifically, LYRASIS senior consultant Thomas F. R. Clareson and LYRASIS digital consultant Leigh Grinstead will:

- Review background documents, policies, and procedures provided by HELIN to gain familiarity with the status of the project.
- Conduct one-day onsite “Smart Start” meeting visit with HELIN administration and members to review the project plan and begin discussion on project needs.
- Help to develop focus group questions to be used in onsite interviews, in individual and group settings, with HELIN staff as well as member library representatives, key users, and potential stakeholders of the consortium’s digital collections.
- Develop survey questions to be used in a web-based survey of HELIN members to determine needs from the statewide digital repository system.
- Assist in drafting stakeholder use cases, which can be extracted from the notes from a 2013 Summit Meeting on the project.
- Facilitate conversations to assist in identifying a repository platform for the HELIN project.
- Prepare a report/action plan detailing needs for an Implementation Grant for the project, and provide an onsite presentation of the action plan for HELIN administration and membership.

The goal of the report will be to provide HELIN members and consortium administrators with an organized action plan to ensure that the implementation of its digital repository can and will meet nationally recognized standards and best practices and contribute strategically to the educational experience and enrichment of HELIN member institution students, faculty, and administrators, and those stakeholders at other types of cultural heritage institutions within Rhode Island.

Scope of Work

Phase 1:

The consultants will work with HELIN administration and members to gather background information on the project, and hold an initial “Smart Start” project planning meeting onsite in Rhode Island. Following the in-person meeting, the consultants will assist HELIN in development of focus group questions for project research, development of a survey tool, and additional development on stakeholder use case studies.

Phase 2:

The consultants will work with HELIN administration and members via phone, e-mail and other methods as needed to assist with repository platform selection.

Phase 3:

The consultants will prepare and deliver a report based on analysis of existing documentation, outcomes of the onsite visit, results of the focus group activity, and survey results. The report will take the form of an action plan, outlining activities needed to implement the Statewide Digital Repository Project for Rhode Island, and recommending potential projects and service providers to assist with next steps. Following the development of the report, the consultants will return to Rhode Island to make a presentation on the final report to HELIN administration and members.

Experience of Consultants

Thomas F. R. Clareson, Senior Consultant for Digital & Preservation Services, LYRASIS

Thomas F. R. Clareson joined PALINET (which became LYRASIS in 2009 when PALINET, SOLINET, and NELINET merged to form a new organization) in October 2005. Clareson led PALINET's digital collections creation and management services, preservation services, and consulting activities, and was responsible for establishing new services and funding sources, grant writing, and outreach to the museum and historical society communities. In his new capacity for LYRASIS, Clareson consults on a national and international basis on preservation, digitization, special collections/archives, remote storage, funding, and advocacy issues.

With more than 20 years of experience in preservation and digitization services, Clareson was previously Global Product Manager at OCLC Online Computer Library Center, Inc.; he also served in various capacities at Amigos Library Services, Inc. Clareson holds an MLS from Kent State University, an MA from Ohio State University, and a BA from Ohio Wesleyan University. Formerly a representative from the Society of American Archivists to the Joint Committee on Archives, Libraries, and Museums, he currently serves on the Board of Trustees of Heritage Preservation.

Throughout his career, Clareson has worked with all types and sizes of academic and public libraries, archives, museums, and various other cultural heritage institutions. He has successfully conducted over 200 site surveys covering preservation, digitization, and special collections-related issues.

Leigh A. Grinstead, Digital Services Consultant, LYRASIS

Leigh Grinstead has more than 20 years of experience working in museums, overseeing collections, budgeting, conducting preservation assessments and collection inventories. She has managed National Endowment for the Humanities and Institute for Museum and Library Services grants, including the Colorado Statewide Connecting to Collections planning grant, and has consulted on five others. She attends and often presents Colorado-Wyoming Association of Museums and Society of Rocky Mountain Archivists conferences and workshops and is an advisor on two IMLS National Leadership Grants focused on archives.

Leigh developed many of her project management, grants work and administrative skills in her five years with the former Collaborative Digitization Program (CDP). She has extensive experience consulting in digital projects, including program management, writing digital plans, providing workflow analysis, and offering training and metadata support for archives, special collections, museums and public, academic and special libraries. Leigh lives in Denver and currently conducts in-person and online courses for LYRASIS.

Cost Proposal*

LYRASIS pricing for this project is \$1,200 per day, reflecting a “volume discount” from the standard consulting rate of \$1,500 because of the large number of days on the project. The proposed schedule for this project is 24 working days over the project period.

Travel expenses for the project are budgeted at \$4,800 total. HELIN will pay for any actual and necessary travel costs, meals, lodging, and out-of-pocket expenses reasonably incurred in the performance of this contract.

Phase 1 Deliverables:

- 10 consulting days (5 days each by Clareson and Grinstead) including Smart Start project planning onsite meeting, focus group question development, survey development, and work on stakeholder use case development.

Consulting Days Phase 1: 10 days @ \$1,200 = \$12,000

Consulting Travel Phase 1 = \$2,000 total for two consultants (2 days onsite each)

Subtotal for this Phase = \$14,000

Phase 2 Deliverables:

- 4 consulting days for repository development planning (2 days each by Clareson and Grinstead) to assist with repository platform selection discussions

Consulting Days Phase 2: 4 days @ \$1,200 = \$4,800

Phase 3 Deliverables:

- 8 consulting days (4 days each by Clareson and Grinstead) for final report development and review
- 2 consulting days (1 day each by Clareson and Grinstead) to provide final project report to HELIN project representatives in-person

Consulting Days Phase 3: 10 days @ \$1,200 = \$12,000

Consulting Travel Phase 3 = \$2,000 total for two consultants (1-2 days onsite each)

Subtotal for this Phase = \$14,000

Consulting Cost:	\$28,800
Travel	<u>\$ 4,000</u>

* Pricing is guaranteed with acceptance of this proposal by June 30, 2014.

Total Project Costs: \$32,800

Proposed Project Schedule

PHASE 1	
May/June 2014	On-site meeting; focus group question development; survey development; work on stakeholder use case development
PHASE 2	
July 2014	Assist with Repository platform selection discussions
PHASE 3	
August/September 2014	Final Report development and review process; provide in-person presentation on Final Report

Contacts

The LYRASIS contact for this project is:

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Senior Consultant for Digital &
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LYRASIS
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Atlanta, GA 30309
Phone: 614-439-1796
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The HELIN
contact for this project is:

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HELIN Executive Director
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HELIN Library Consortium
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Agreement

Upon review and acceptance of this proposal, the memo agreement appended to the document will be signed by the appropriate representative of HELIN.

About LYRASIS

As the leading regional membership organization for libraries and information professionals, LYRASIS works to ensure their success today and tomorrow by providing access to more of the shared knowledge and expertise, innovative products and services, and customized solutions they need to serve their communities most effectively and, by working together, advance the profession.

Through the power of community and with strength in numbers, LYRASIS members work together as peers and with industry experts to meet the challenges of constant change. LYRASIS is a national leader in innovation, collaboration, and effective support for libraries and librarians.

For more information on LYRISIS consulting services, please visit <http://www.lyrasis.org/Products-and-Services/Consulting.aspx>.

Date: March 12, 2014
To: Robert Aspri, Executive Director, HELIN Library Consortium
From: Robin Dale, Director of Digital & Preservation Services, Lyrasis
Subject: HELIN Digital Repository Project Consulting Agreement

This memo, appended to the proposal dated March 12, 2014, will serve as an agreement for the **HELIN Library Consortium Statewide Digital Repository Project for Rhode Island** detailed in the proposal.

Payment will be made according to the following terms:

- \$14,000 (including initial consulting fees and travel) will be billed at the conclusion of Phase I.
- \$4,800 will be billed at the conclusion of Phase II
- \$14,000 (including final consulting fees and travel) will be billed at the conclusion of Phase III.

By my signature, I agree to the conditions outlined in the Proposal.

Laurie Gemmill Arp
Assistant Director for Digital & Preservation Services
LYRASIS

Date

By my signature, I agree to the conditions outlined in the Proposal and authorize work to begin.

Robert Aspri, Executive Director
HELIN Library Consortium

Date