

REQUEST FOR PROPOSAL

Integrated Library System



Camas Public
LIBRARY

625 NE 4th Ave
Camas, WA 98607
360.834.4692

ISSUED

March 1, 2018

VENDOR QUESTIONS DUE

March 14, 2018

PROPOSALS DUE ON OR BEFORE

April 11, 2018

SUBMIT PROPOSALS TO

Danielle Reynolds dreynolds@cityofcamas.us



Camas Public
LIBRARY
Unearth something extraordinary.



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I. General Information

This Request for Proposal (RFP) is issued by the Camas Public Library (henceforth referred to as “Library”) for the purpose of obtaining proposals from vendors for a web-based Integrated Library System (ILS). Specifications for this system are included within Section II (ILS Functional Requirements).

Background

Camas Public Library, located in downtown Camas, Washington, is a municipal single-branch library—a department of the City of Camas.

Currently, the Library shares an ILS as part of a consortium with the Fort Vancouver Regional Library (FVRL) system. The consortium uses SirsiDynix’s Symphony 3.5.2.1. During this ILS migration, the Library will be splitting its holdings from the FVRL system. Experience in this type of migration will be favorable within the evaluation. Please provide examples within the corresponding questions in Appendix I.

Camas Library digital holdings do not currently have MARC records. However, this is an anticipated goal within a new ILS.

General facts for consideration:

Population Served	23,080
Library Physical Holdings* (Title Records Item Records)	95,097 115,681
Library Digital Holdings* (Title Records)	35,900
Registered Borrowers* (Camas Reciprocal Borrowers**)	13,773 51,616
Annual Circulation (2017)	229,002
Staff Members	18 regular employees, 5 substitutes

* subject to change by time of contract and/or migration

**Per the Metropolitan Interlibrary Exchange (MIX) Agreement, Camas Library will issue patrons reciprocal library cards for several libraries within the jurisdiction including the patrons from the current ILS we share with FVRL.

Project Timeline

Proposals are due by 5:00 pm PDT **April 11, 2018**. Late responses will not be considered.

Questions about this request or the process should be directed to:

Danielle Reynolds, Collections and Technology Manager
dreynolds@cityofcamas.us

Event	Date
RFP issued	March 1, 2018
Deadline for questions	March 14, 2018
All questions responded to	March 21/28, 2018
Proposals due	April 11, 2018
Finalists Selected for Demos	April 25, 2018
Vendor demos	April 26 – May 23, 2018
Announcement	June 6, 2018
Contract to City Council for approval	June 18, 2018

Included in the proposal, the Library would like to receive answers to Informational Questions (Appendix I). Product sheets and specification documents may also be submitted where applicable to supplement written responses.

Bid responses and scheduling presentations should be done through Danielle Reynolds at dreynolds@cityofcamas.us.

The implementation date will be arrived at by agreement, between the Library and the selected vendor. However, the Library expects any ILS to be fully operational no later than December 31, 2018.

System & Vendor Services Information

Connected & Unconnected Services	Vendor/System Information
Acquisition Vendors	Baker & Taylor: Title Source 360, Midwest Tape, and Amazon
Automated Materials Handler	P.V. Supa Libretto → SIP required
Bibliographic Records	OCLC's Connexion
Computer & Print Management System	Comprise Technologies SAM software including wireless printing SmartALEC → SIP required
Databases	34 subscribed databases: EBSCO, Gale, OCLC, and ProQuest products → A PHP Driven SIP2 Class is used to authenticate
Digital Collection	OverDrive → SIP required
Interlibrary Loans	OCLC's World Share
Payment Kiosk	Comprise Technologies Smart Kiosk software → SIP required
Receipt Printers	EPSON TM-T88/Star TSP100 models
RFID System	Tagsys RFID pads; no gates
Self-Check Machines	Bibliotheca SelfServe 200
Serials Vendor	EBSCO
Website	Joomla! Content Management System

The Library will be seeking other related services during the transition to a new ILS System, which they have enumerated in the following chart. Please explain any third-party vendor connections already capable within your ILS, any connections currently in progress for near future use, or any related feature of your ILS the Library could option. In your proposal, please list these in detail as part of *Appendix I: Informational Questions*.

Authority Control	As part of the FVRL system, Camas Public Library is currently using the LTI Authority control. However, within this year FVRL will switch to the SirsiDynix Authority Control module.
Discovery- Reader's Advisory	Enhancement within the OPAC for read-a-like, series information, etc. No current vendor.

Events Calendar	Library program calendar, plus the ability to pull reports detailing statistics about the events, such as attendance, age demographics, etc. No current vendor.
Newsletter & Mailing Lists	Ability to email users or obtain mailing lists from the ILS. Ability to compile e-mails and design monthly newsletters. No current vendor.
Online Payment: Fines/Fees	Credit card payment for fines & fees within the ILS. Comprise Software for in-library payment; no online vendor.
Records Enhancement	Metadata enhancement within the OPAC for cover images, professional reviews, etc. No current vendor.
Room Booking	Ability to book study rooms and/or meeting rooms, and pull reports detailing the use of these rooms. No current vendor.
Telephone Notification	Telephone notices for overdue and/or billed notifications. Current notifications ae through FVRL. No current vendor.

Overall Intended Outcomes

The Library seeks a new ILS in order to fulfil the following features:

Adaptability- Any selected ILS should have the adaptability to be scalable and flexible for expanding collections and customer base. The City of Camas currently has an average yearly growth rate of 3.3%. The Library database must allow for increases with patron records, collections codes, location identifiers, and bibliographic/title records.

Curated Collections- Any selected ILS must include strong analytic tools. The Library will use these tools to create a strong, independent, curated collection for the community—focusing on genres, formats, and other key informational points that the community desires.

Discoverability- Ability to enhance the OPAC for the Camas Community to facilitate a better Discovery experience for library materials, and include access to the OverDrive digital library.

Responsiveness- Any selected ILS should have the ability to adapt to Library needs and to further allow the Library to make changes to adapt to patrons needs. Strong analytic tools are necessary; statistical information will help focus our decisions regarding purchasing, policy and future directions.

Web-Based- Any selected ILS must include a web-based staff client to allow for access beyond the Library walls. This will be necessary for growing the Library’s Outreach department and meeting patrons where they are in the community. Staff must be able to perform circulation duties, such as library card registration and materials checkout, outside of the Library network.

Training & Implementation

The vendor will perform training of select Library staff in the use of all functions, including system administration and configuration, to take place at the Library. Furthermore, the vendor will provide options and pricing for additional staff training, either on site or remote, including refresher training.

The vendor will be responsible for the entire implementation of the recommended solution. Within the proposal, the vendor should describe the structure of the team that will manage the Library’s implementation and the proposed project management tools. Additionally, a timeline of the implementation process must be provided.

Criteria and Evaluation

To be eligible for consideration, all proposal-related materials must be received by April 11, 2018 by 5:00 PM (PST). Electronic submissions are preferred.

To be considered complete, proposals must include the following:

- Confirmation of compatibility with the items under the “System & Vendor Services” heading or replacements (if applicable)
- Examples and confirmation of the tasks outlined in the “ILS Functional Requirements” section
- Responses to items in the “Informational Questions” Appendix, including a timeline for implementation
- A plan for data migration from the shared ILS with FVRL
- Unbundled pricing for all components

During this RFP process, the Library is also interested in hearing about any products or services that may allow us to offer any other new or improved services to our patrons.

All eligible proposals will be evaluated by a committee of representatives from the Camas Public Library & the City of Camas. Finalists will be notified via email and invited to provide an in-depth demonstration outlining their ILS solutions. Note the lowest cost proposal will not necessarily be the winning proposal.

The following criteria will be used to evaluate each proposal:

	Proposal	Product Demo	Total Possible Points	Percentage of Total
Vendor Future Vision	5	-	5	2.5%
References	10	-	10	5%
Cost	10	-	10	5%
Implementation / Migration Plan	10	-	10	5%
Training	10	-	10	5%
Compatibility with Connected Services	15	10	25	12.5%
Staff & Technical Functionality	20	45	65	32.5%
User Experience	20	45	65	32.5%
TOTAL	100	100	200	100%

II. ILS Functional Requirements

Outlined below are a number of modules and system requirements. Instead of providing a checklist of all specific ILS actions, the Library seeks responses to required and highly desirable key functionalities.

Where possible, the Library’s goal is to visualize the steps associated with the tasks. **Please provide screenshots or other supplemental materials to help clearly show the functionality as available.**

Additionally, provide information about any additional “value added” services or features of your product line that you think might be of interest to the Library. Please indicate whether these additional features are included as part of the base ILS product, or if they are available for an additional cost.

If some tasks and/or abilities of the ILS require a third-party integration, please list which vendors/products are compatible with your ILS.

In the event a single vendor's submitted RFP cannot fully meet the needs of the Library for the proposed software and support services identified in this RFP, multiple contracts may be awarded for the specific services each vendor can provide.

OPAC

FUNCTIONALITY	REQUIRED/OPTIONAL
Integration with OverDrive, including real-time updates of inventory	Required
Display enhanced content: reviews, read-a-likes, etc.	Required
Display of cover art	Required
Intuitive functionality for patrons	Required
Search results are sortable & can be filtered	Required
Clear location & availability on results screen	Required
Search includes browsing, keyword & advanced search	Required
Online fine payment solution ability	Required
Ability to design & display customized library material carousels	Required
Ability to readily display new materials	Required
Smart searching, including "Did you mean?"	Required
Responsive mobile website design	Required
Compatibility with current & older devices and/or browsers	Required
Customization of heading and other wording throughout the catalog	Required
Website accessibility compliance	Required
Integrates with Google Analytics or equivalent	Required
Ability of patron to manage notifications methods	Required
Ability for patron to update contact information for theirs and, optionally, for linked family member accounts	Required / Optional
Ability for linked family accounts to renew items	Optional
Ability to email patrons when new materials are added based on a profile set by the patron under their account	Optional
Catalog provides personal recommendations based on previous activity	Optional
If no search results found, offer other suggestions based on search term and/or reading history	Optional
Personalized display for language (i.e. Spanish, Russian, Chinese)	Optional
Submit suggestions for purchase	Optional
Integration of location mapping to indicate the location of an item within the Library	Optional
FRBRized Results	Optional
History of checked out items capability in "My Account" including digital usage.	Optional
Integration with database vendors	Optional

Circulation

FUNCTIONALITY	REQUIRED/OPTIONAL
REGISTRATION	
Patron can self-register for a library account	Required

Patron can update information & manage own account including renewals, payment, cancel/freeze holds without staff intervention	Required
Patron record includes optional field for marketing materials (i.e. newsletter) from the Library	Required
All fields searchable, including, but not limited to name, telephone, address & email	Required
Ability to copy details from one patron registration to another	Required
Ability for Library staff to see current and historical circulation	Required
Registration process provides alert for duplicate customer record based on defined fields	Optional
Ability to link membership of people in same family	Optional
FINANCIAL MANAGEMENT	
Ability to pay full and/or partial replacement cost of materials	Required
Option for waiving & refunding	Required
HOLDS & NOTIFICATIONS	
Notification for holds, overdues, courtesy notices including telephone, email and SMS	Required
Records kept for notices sent	Required
Ability of patron & staff to cancel holds	Required
Ability of patron & staff to suspend or freeze holds	Required
Option to cascade failed notices to a secondary method of communication if available	Optional
CIRCULATION & MANAGEMENT	
Mobile circulation inside building & outside library without need for offline circulation	Required
Ability for offline circulation	Required
Integration with RFID self-checkout functions	Required
Ability to post messages to patron accounts for internal use and for communicating with patrons. Must be available on default staff view of patron accounts.	Required
Detailed search ability for materials in the staff client, including ability to filter and search by numerous fields including, but not limited to keyword, title, author, ISBN/ISSN	Required
Customized receipt ability	Required
Check in receipts ability	Required
Ability to provide receipts via multiple options, including email, print & SMS	Required
Ability to customize wording and graphics for messages & notices	Required
Same record can be in use at multiple workstations	Required
Option to auto-renew materials based on set criteria	Optional
Digital product usage recorded as patron activity	Optional
Digital product circulation activity visible and managed via patron account	Optional

Reports

FUNCTIONALITY	REQUIRED/OPTIONAL
Ability to export data in standard formats (e.g. text, CSV, Excel, XML, PDF)	Required
Ability to use report templates	Required

Ability to create custom reports	Required
Ability to schedule reports	Required
Ability to run reports for subject, DDC ranges and/or genres	Required
Provides reports for which library materials are used and in which locations	Required
Ability to identify patron inactivity	Required
Ability to include cross-references between data sets	Required
Ability to produce reports on demographics	Required
Ability to report on and access any data within the database	Required
Reports having the ability to provide evidence-based collection analysis & evaluation functionality (similar to CollectionHQ)	Optional
Provides recommendations for withdrawal, including title, subject, author, DDC	Optional
Ability to track top search history	Optional
Ability to automatically send report results per a schedule via email	Optional

Cataloging

FUNCTIONALITY	REQUIRED/OPTIONAL
RDA ability & compliance	Required
Tools are available to convert / upgrade MARC data to RDA or other future cataloging standards	Required
Ability to index all fields in MARC records	Required
Ability to integrate digital content from third party vendors	Required
Access and utilize MARC records from a variety of sources	Required
Ability to specify loading parameters for overlay	Required
Ability to specify match-point in loading profiles	Required
Ability to automatically create and populate item information during MARC loading process	Required
Ability to make global changes to the system	Required
Spellcheck capability	Optional

The Library also requests a step-by-step guide to creating original records in your ILS. Show all editing windows available. Additionally, provide a step-by-step guide to the discard process for a batch of materials as well as individual items. Please include items that have fees attached from previous checkouts and titles that have holds.

Serials

FUNCTIONALITY	REQUIRED/OPTIONAL
Ability to report missing issues.	Required
Ability to create frequency of serials templates	Required
Ability to create routing information	Optional
Ability to send claims of missing issues to vendors	Optional

Acquisitions

FUNCTIONALITY	REQUIRED/OPTIONAL
Ability to utilize EDI ordering	Required
Ability to create order records from imported vendor carts	Required

Automated status changes from Ordered/Receive/Invoiced without staff intervention	Optional
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The Library also requests a step-by-step guide to placing orders & receiving items from orders. Please also provide any steps for the process of claiming materials not received.

System, Server and Software Functionality

FUNCTIONALITY	REQUIRED/OPTIONAL
Ability to distinctly brand and customize options for staff and public interfaces	Required
Ability to access the ILS anywhere	Required
Automatic regular backups with no staff intervention	Required
Software regularly updated and upgraded with no impact on service	Required
Development cycle that is responsive to known issues and enhancements	Required
Notice of software update provided minimum 24 hours in advance of an update	Required
Security measures are included to minimize chance of fraudulent activity or access	Required
Availability/usage of SIP2 connections	Required
Ability to add and subtract SIP2 licenses without additional cost	Required
Ability to add and integrate APIs (provide an overview of available APIs)	Required
Documentation for API integration and usage examples	Required
Ability to log events (provide information on what is available in the logs)	Required

Migration and Support

FUNCTIONALITY	REQUIRED/OPTIONAL
Complete migration of patron, bibliographic and item data from SirsiDynix's Symphony	Required
Data migrated in a secure fashion, using industry standard encryption	Required
Availability of tools to convert/upgrade MARC data for increased discoverability	Required
Documentation is provided & is keyword accessible	Required
On-site training is provided for all functionality, including system administration and configuration	Required
Known issues are published with up-to-date notes	Required
Regular updates on open tickets are provided to ticket creator	Required
Escalation process is provided for unresolved issues	Required
Work flow analysis is available and conducted before migration of data and before system parameters are established	Optional

III. References

Please provide three references from other libraries, preferably of similarly sized collection and/or service populations that currently use your recommended solution. If applicable, please provide recommendations from libraries that have converted from SisiDynix's Symphony software your ILS.

IV. Hosting

The Library will consider self-hosted and cloud-based solutions. If the vendor offers both options, the Library will evaluate both solutions. If proposing a hosted or self-hosted option, explicitly state these options and provide separately itemized pricing.

For self-hosted solutions, the vendor is to provide necessary system requirements for best performance. The vendor will also send details about network connection requirements for web-based services and support.

If the vendor's software is hosted using a commercial provider, the vendor is to tell the Library the details of the plan they would expect to use for the Library. For example, if the vendor contracts with Amazon "an EC2-based m3.medium instance" would tell the Library everything it needs to know regarding processors, memory, storage, bandwidth, and the like. If the vendor is using dedicated hosts, regions or instances, the vendor will state this explicitly.

If the vendor's products are running from a private or self-hosted data center, the vendor will provide specific information about the architecture, and be sure to detail failover processes. The Library is looking for a level of detail commensurate with what it would expect to know from a commercial provider's plan.

V. Database Connectivity

The vendor will describe all available scenarios to connect to the backend database to access stored data. For example, database connection via ODBC is available with a Windows login.

The vendor will give specific details about all reports predefined in the ILS system, as well as available report parameter, filtering, and exporting options. If the ILS system has a query by example tool (QBE) the vendor will provide documentation about any limitations the tool may have for connecting various tables.

Logging

If the vendor's system is capable of generating raw logs based on transactions, the vendor will provide examples of logged events. Additionally, the vendor will state if those transactions are stored in flat files or in a database. The rationale behind asking this is the extraction and analysis of said logs using an external daemon such as Logstash.

VI. General Terms and Conditions

Disclaimer

This RFP does not obligate the Library to contract for services specified herein. The Library reserves the right at its sole discretion to reject any and all proposals received without penalty and not to issue a contract as a result of this RFP. All proposals and any accompanying documentation become the property of the Library and will not be returned. Information submitted in response to this RFP shall become the property of the Library. The Library will not reimburse vendors for any costs involved in the preparation and submission of responses to this RFP or in the preparation for or participation in any subsequent demonstrations and meetings.

All proposals will be considered as public records as defined in Chapter 42.56 of the Revised Code of Washington (RCW). Any information in a proposal that the vendor desires to claim as proprietary and exempt from disclosure under the provisions of Chapter 42.56 RCW, or other state or federal law that provides for the non-disclosure of your document, must be clearly designated. The information must be clearly identified and the particular exemption from disclosure upon which the vendor is making the claim must be cited. Each page containing the information claimed to be exempt from disclosure must be clearly identified by the words "Proprietary Information" printed on the lower right hand corner of the page. Marking the entire proposal exempt from disclosure or as Proprietary Information will not be honored.

If a public records request is made for the information that the vendor has marked as "Proprietary Information" the Library will make reasonable efforts to notify the vendor of the request of the date that the records will be released to the requester unless the vendor obtains a court order enjoining that disclosure. Vendors who do not respond to this RFP are still eligible to submit a competitive bid during any future process for related products and services. Vendors who do respond to the RFP will not receive special consideration during any future competitive bid process for related products and services.

[Effective Term of Proposal](#)

The Library expects to enter into a contract with the awarded Vendor for a term limit of no less than six (6) years, corresponding to the City's budget cycles.

[Award and Negotiations](#)

This Request for Proposal does not obligate the Camas Public Library to accept or contract with any vendor. The Camas Public Library reserves the right to enter into discussions with the vendors whose proposals are deemed most advantageous for the purpose of negotiation. If more than one proposal is found to be satisfactory, the Camas Public Library reserves the right to negotiate simultaneously with more than one vendor.

[Rejection of Proposals](#)

The Camas Public Library may determine that it is in the best interest to reject any or all proposals submitted in response to this RFP.

[Withdrawal of Proposal](#)

Vendors may withdraw their proposals at any time prior to the date and time for proposal opening. Requests for withdrawal must be made in writing on the vendor's letterhead to the official contact for the RFP.

Appendix I: Informational Questions

1. What are your replacements for connected or unconnected services (if applicable)? [Pages 4-5]
2. Have you participated in a consortium split migration?
3. What is your future vision?
 - How you anticipate responding to new technologies?
 - Commitment to on-going product development?
 - Anticipated frequencies of updates to the product?
 - Future plans over the next 5 years?
4. What is the service time for support requests?
5. Does your ILS have database search capability within a paid-database subscription to return articles in a search?
6. Does your ILS have a limit to the number of identifying item types and/or other identifying collection defining fields?
7. Does the report of missing serials have an option to automate the report?
8. Does keyword searching include all MARC fields? Demonstrate a search for books from a series.
9. Does your ILS support loan periods defined in days, hours and minutes?
10. After an item is checked-in, is it possible to determine:
 - when (date, time) the item was checked-in?
 - where (workstation) the item was checked-in?
 - when the item was last checked-out?
 - where the item was last checked-out from?
11. Does the ILS alert the staff member to items that they should trap for a hold request? Does the staff member have the ability not to trap the item?
12. Does the Library have the option to set the search tool to use an auto-suggest feature for keyword and phrase searches?
13. Does your ILS feature any Outreach modules (i.e. homebound services)?