



**Burlington Vermont's Public Library**

**Request for Proposals  
Integrated Library System  
Proposals Due May 15<sup>th</sup>, 2014**

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## **Introduction**

The Fletcher Free Library (“the library”) is the largest public library in the State of Vermont. The library is a municipal department of the City of Burlington.

The library is looking to embrace new technologies and services in an increasingly digital age. A new ILS will support the library with more efficient workflows, providing information about patron use and behavior for data driven decision making, and be flexible for future growth and adaption. The library has been running the SirsiDynix Symphony ILS since 2003.

About us:

# of member libraries	1
# of item records	139,887
# of serials	255
# of library card holders	13,362
Population of Burlington	42,000
Annual circulation	395,015
# of staff workstations	17
# of public workstations	37
Employees (FTE)	18.2
Current ILS	SirsiDynix Symphony (since 2003)

## **Timeline**

The Fletcher Free Library will follow the estimated schedule below:

- Vendor proposals due May 15<sup>th</sup>, 2014
- Vendor notification to enter contract June 30<sup>th</sup>, 2014
- Estimated Go Live date September 2<sup>nd</sup>, 2014

## **Questions**

All questions for clarification of any section of this RFP can be submitted via email to Robert Coleburn ([rcoleburn@burlingtonvt.gov](mailto:rcoleburn@burlingtonvt.gov)). A written response to questions will be sent via email within 24 hours.

## **Proposal Submissions**

Vendors should submit complete proposals by May 15<sup>th</sup>, 2014

Please send two physical copies to:

Robert Coleburn  
Fletcher Free Library  
235 College St  
Burlington, VT 05401  
802-865-7218

Electronic copies should be sent to [rcoleburn@burlingtonvt.gov](mailto:rcoleburn@burlingtonvt.gov)

## **Terms and Conditions**

This RFP does not obligate Fletcher Free Library to accept or contract for any expressed or implied services.

Proposals received after the deadline will not be considered.

The Library reserves the right to enter into discussions with the offeror(s) determined to be reasonably susceptible of being selected for award, or to enter into exclusive discussions with the offeror whose proposal is deemed most advantageous, whichever is in the Library's best interest, for the purpose of negotiation. In the event that exclusive negotiations are conducted and an agreement is not reached, the Library reserves the right to enter into negotiations with the next highest ranked offeror without the need to repeat the formal solicitation process.

All responses, inquiries, and correspondence relating to this RFP and all reports, charts, displays, schedules, exhibits, and other documentation produced by the offeror that are submitted to the Library, as part of the proposal or otherwise,

shall become the property of the Library when received by the Library and may be considered public information under applicable law.

Vendor is advised to be familiar with relevant federal, state and local laws, regulations and ordinances including, where applicable, the City of Burlington's Livable Wage Ordinance, before submitting a proposal.

The City of Burlington does not discriminate on the basis of political or religious affiliation, race, color, national origin, age, sex, sexual orientation, marital status, veteran status or disability.

### **Open Source Support Vendors**

In addition to proprietary ILS products, The Fletcher Free Library will consider contracting with an open source support vendor for the purposes of implementing and maintaining the Evergreen ILS. The Fletcher Free Library seeks a service provider that has a proven track record of giving prompt, effective, and comprehensive Evergreen support to libraries. Open source support vendors should, to the best of their ability, answer the stated questions in this RFP.

Services called for include:

- Initial setup of server(s) located at a hosted facility.
- Migration of all library-owned data from SirsiDynix Symphony to Evergreen, including testing to ensure data loss has not occurred and corrective action if indeed there was loss.
- Initial customization of Evergreen based on the needs of each library department;
- Troubleshooting during installation, migration, and initial customization process to ensure that staff and patron workflows can occur properly;
- Ongoing, as-needed maintenance of Evergreen.

## **General Information**

Include narrative about your company, your approach to the project, and your approach to customer service with the following information:

- A statement of your company's experience and qualifications. Include a general overview and history of your company, investor or ownership information, number of years in business, number of employees, and names of key executives.
- Has your company been involved in a merger, acquisition, or reorganization in the last five years? If so, please describe.
- Identify proposed staff members who would be involved in the proposed solution, including a summary of their qualifications.
- Detail your firm's experience in providing the proposed solution for at least three similar customers, with project dates, customer name, contact person, email address, and telephone number(s). At least one project should have been completed within the last 12 months, and one 24 – 36 months ago.
- How many customers are currently running production versions of your proposed solution? What sizes and kind of libraries make up your customer base? Over the last 12 months indicate how many new clients you've contracted with, versus migrations from existing/previous clients, and provide a list of those firms.
- Describe the library staff resources required to support the migration and implementation work for the proposed solution, including the roles required, level of involvement, and length of involvement.
- Provide an estimated migration and implementation timeline for a project of this size and complexity. What data, if any, cannot be migrated to your solution from the SirsiDynix Symphony product?
- Provide your proposed support offering, including the mechanism for reporting and resolving issues, support staff access (email, phone, company website) and availability, resolution guarantees, and upgrade support, included in annual maintenance fees. Does your maintenance

offerings include preventative maintenance and system monitoring at no additional cost? Please describe the type of support you offer on the weekends.

- Describe the training solution proposed. Does your company provide on-site training for the system? Do you offer web-based training? Please describe what options are available and the costs involved with each option.
- Can your system communicate with Envisionware's PCReservation and block a patron who is not authorized to reserve a public computer?
- Describe your company's philosophy to product development. Are annual roadmaps published for customers to review? How many versions has your company released for the proposed ILS in the last 24 months?
- How are upgrades implemented? How much system downtime is typical for an upgrade? Can you schedule upgrades when our library is closed?
- What innovations have you deployed or are you developing that may not be on our radar?
- Describe your pricing model, for example, do you use the number of staff logins to determine pricing for your system?
- Describe your server hosting facility. Specifically, discuss server specifications, Internet infrastructure, power source, and security (both physical and virtual). Please list any redundancies in place for above systems.

## **Cost Proposal**

Vendors will submit a cost proposal for their proposed solution using the general format below. If additional features are being proposed, please add them to the table.

<b>Description</b>	<b>Initial</b>	<b>Maintenance Year 2</b>	<b>Maintenance Year 3</b>	<b>Maintenance Year 4</b>
Required Modules <ul style="list-style-type: none"> <li>• Circulation</li> <li>• Acquisitions</li> <li>• Serials</li> <li>• OPAC</li> <li>• Cataloging</li> <li>• Reports</li> <li>• Outreach</li> <li>• Administration</li> </ul>				
Authority Control Module				
Authority Control Processing				
EDI for Acquisitions				
SIP/SIP2/NCIP (per license)				
Offline Circulation				
Phone, email, and text messaging				
Z39.50				
eCommerce				
Digital Collection Management (less than 25,000 items)				
Data migration services				
Implementation services				
Trainingservices				
Hosting services				
System Monitoring Software				
Other installation fees (detail each)				
Other functionality/modules (detail each)				

## OPAC

- In your system, can patrons place holds on on-order, checked out and available items?
- Does your system include seamless incorporation of eBooks and downloadable audio from third party content providers such as OverDrive, Recorded Books, ProQuest (ebrary) and Axis360 in the library catalog? In other words, is it possible to discover, access, and download ebooks and audiobooks from the OPAC without navigating away from the OPAC?
- Does the OPAC display RDA indexing?
- How does your system display multiple formats for a given title?
- Does your system have the ability to display series titles in order?
- The system must include book jacket and cover art images for various formats and support third party content of such. Please include any extra costs.
- Please describe the level to which your system supports third party content integration from companies such as LibraryThing, Novelist, and GoodReads.
- Does your OPAC allow staff to create lists and post lists in PAC display area.
- Does your OPAC support faceted searching?
- Please describe your OPACs solution for mobile devices. Does your OPAC require a third party app to display OPAC content?
- Please state whether your OPAC supports the following: spell checking, relevancy ranking, user contribution (patron recommendation and/or starring), and integration with social networking sites.
- Does your system include a youth OPAC interface?
- Describe patron library account functionality. Once logged in, can a patron see what they have checked out, renew items, place items on hold, pay fines through PayPal or with credit card? Can they view a historical list of items they have checked out in the past?

- Does the system include a customizable web portal? The portal must not require third party web-authoring tools (e.g. Dreamweaver) to develop or maintain content and links. A content management solution is preferred.
- The portal must include built in HTML/XML tools that do not require staff knowledge of hypertext (HTML) or extensible markup language (XML).
- Do any of your existing clients use your web portal as their library website? In other words, the library website and OPAC are rolled into one site.

### **Circulation**

Can your circulation module perform the following:

- Retain patron fine payment history?
- Add pop-up notifications to patron records?
- Can it create multiple types of patron accounts, define separate loan rules and material limits for each type, and have certain fields populate in those record types?
- Display patrons' last activity date, updated for online activity as well as circulation?
- Can it backdate material check in dates?
- Can it globally "search and replace" information on a selected group of patron records?

Narrative responses about your circulation module

- Does your circulation module use client based software or is it web based?
- Describe how your system supports outreach services, including circulation and issuing cards offsite. Is the offsite functionality in real time?
- Can circulation functionality be accessed from any current browser, including on a tablet or mobile device?

- What ecommerce capabilities are available? Can library patrons use credit and debit cards to pay fines and fees? Which payment gateways are compatible with your system? Please include pricing for ecommerce hardware required in your bid.
- Describe how your system supports linked family accounts, including how notices are handled and how common information is updated across multiple accounts.
- Describe offline circulation capabilities.
- Describe your notices capabilities (paper, email, texts, phone) including notice types and delivery methods.
- Which fields in the patron account are searchable?
- Can basic statistics be gleaned from the circulation module? For example, can we tell how many times an item has circulated from the circulation module?
- Can default values be set up in certain fields? For example, when registering a patron, can “802” (VT area code) be set up to appear every time in the area code field?
- Describe the configurability of check out receipts. Can receipts be emailed?

## **Cataloging**

Can your cataloging module perform the following:

- Batch record editing?
- Ability to hide records, call numbers or items from public view?
- Overlay acquisitions on-order records from vendors (such as Baker & Taylor, Ingram, Brodart or other major distributors) with OCLC records?
- Edit bibliographic and authority policies?
- Add, transfer, and remove copies?
- Provides cut, copy and paste commands for MARC record editing?
- Does the system provide any label printing utilities?

- Describe the process for updating entries in bibliographic records based on authority heading changes. How are entries matched against current LC headings? Are updates automatic? Is there an additional fee (one time or recurring) for this service?
- Describe the process for withdrawing items from the collection. What happens to any fines associated with the items? What portions of the process can be handled through routine reports?

Narrative responses about your cataloging module:

- The library is currently reviewing our cataloging processes to optimize staff efficiency and patron service. Please describe the recommended workflow using your solution for loading and updating bibliographic records using OCLC , both individually and in batch mode, loading new and updated authority records, loading/overlying bibliographic records, and updating authority records.
- How are global changes made to bibliographic records? Can global editing be performed on every field in a MARC record? What are the restrictions, if any? How are manual edits made to bibliographic records, and what are the restrictions, if any?
- How are bibliographic records deleted? Are there options for both batch deletion and individual deletion? What elements can be used to identify and delete collections of records in a batch?
- How are electronic resources handled in your system? Do they require the creation of item/copy records to be visible?
- Does your system allow duplicate call numbers? Please describe any restrictions.
- Describe the extent to which new cataloging standards such as RDA and FRBR are implemented in your system. Are external links to resources such as RDA Toolkit accessible from your cataloging module? What is necessary to enable such links?

## **Acquisitions**

Please confirm or describe your system functionality:

- Ability to change budgets on the fly.
- Ability to quantify total items ordered and total cost on each order record.
- Ad-hoc reports for: expenditures/encumbrances for a specific budget line, holds-to-copy or holds purchase alert (number of items on order, number of current copies), item status.

Please describe the following, and include other information about your product in this category:

- The library is currently reviewing our acquisitions processes to optimize staff efficiency and patron service. Please describe the recommended workflow using your solution for acquiring and receiving materials, including electronic selection, ordering, obtaining, recording, and distributing bibliographic records, budget encumbrance and reconciliation, importing invoices, importing bibliographic records for received items, receiving materials, and reporting.
- How does your system record invoices and payments?
- How does your system support order tracking?
- How does your system manage standing orders?
- Describe the method for editing or updating groups of order records.
- Describe the process for setting up ordering and invoicing via EDI. Does the set-up require ILS vendor assistance? Are there additional fees (ongoing and/or recurring) for vendor supported EDI setup?
- Do you have existing clients that have EDI setup and with Brodart, Baker and Taylor, and Ingram?

## Serials

Please confirm or describe your system functionality:

- The catalog and circulation displays should show summary holdings for each subscription.
- Ability to customize fields for printed labels.
- Ability to circulate single issues.
- Generates prediction patterns for determining when the next expected issue of a serial is scheduled to arrive.

Please describe the following, and include other information about your product in this category:

- Give an overview of how the ILS handles typical tasks associated with serials, such as receiving/check in, routing, and claiming. Is there a recommended workflow for handling issues?
- Describe how staff can create and change publication patterns, chronology displays, and enumeration displays on-the-fly.
- What information, reports, and statistics can be generated from Serials records? How are issues identified as not received and claimed from EBSCO?

## **Reporting**

The library needs fast and easy access to information about patrons and material usage to make data driven decisions, including information about ebooks and other electronic content. The library has the following requirements for a reporting environment:

- Allows staff users to define and run reports themselves both because the interface is easy to use and also because the load on the system does not interfere with normal day to day operation.
- Is SQL compliant, so 3rd party reporting tools can be employed.
- Allows scheduled reports to run at a date and time specified by authorized staff and allows scheduled reports to be emailed.
- The reporting module should be web-based and accessible via any standard web browser.
- Offers a data mining or decision support component that provides data to support trend analysis and collection development.

Describe the reporting features of your ILS, including the requirements above and if there are limitations to the fields and tables the library has access to for the purpose of generating reports.