

CITY OF COUNCIL BLUFFS, IA, FY19-34

REQUEST FOR PROPOSALS

FOR

COUNCIL BLUFFS PUBLIC LIBRARY INTEGRATED LIBRARY SYSTEM

The Council Bluffs Public Library (CBPL or City) is soliciting proposals for a new integrated library system (ILS) with public access catalog (PAC) that will help meet customers' and staffs' 21st century needs. This new system will be installed at Council Bluffs Public Library at 400 Willow Ave, Council Bluffs, Iowa 51503

The (CBPL) has been with its current vendor since 1996 and is looking for a more modern ILS.

Notice is hereby given that the City will accept proposals until 2:00 p.m. CST on June 26, 2019, at the Purchasing office. Proposals must reference FY19-34 Integrated Library System RFP.

Any questions regarding this proposal shall be submitted to Kim Riebe, via e-mail (kriebe@councilbluffs-ia.gov), by June 13, 2019 at 2:00 p.m. Any questions received via phone, in person, or after that deadline will not be addressed by any city personnel. Answers to those questions and any addenda will be posted on the city's website, www.councilbluffs-ia.gov, no later than 3:00 p.m. June 14, 2019.

No verbal information to Firms will be binding on the City. The written specifications will be considered clear and complete, unless written attention is called to any apparent discrepancies or incompleteness before the opening of the proposals. All alterations to the specifications will be made in the form of written addenda. These addenda shall then be considered to be part of these specifications.

The contract schedule represents the City's best estimate of the schedule that will be followed. If a component of this schedule, such as the opening date, is delayed, the rest of the schedule will be shifted accordingly.

The approximate contract schedule is as follows:

Issue RFP:	May 31, 2019
Final Date to Submit Written Questions:	June 13, 2019
Responses to Bidder's Questions Posted:	June 14, 2019 or sooner
Proposals Due:	10:00 AM, June 26, 2019

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	**Proposals received after this deadline will not be evaluated.
One Hour Presentations:	July 17-19, 2019
Contract Negotiations:	July/August 2019
Contract Award:	July/August 2019
System Installed & Operating Fully:	No later than January 31, 2020

All submittals shall be addressed to: **Kim Riebe**
 Purchasing Division
 FY19-34 Integrated Library System RFP
 209 Pearl St., Council Bluffs, IA 51503

Respondents are to submit one (1) original along with five (5) copies and an electronic version (.pdf) to be e-mailed or on CD, DVD or Flash Drive.

It is expressly understood that any costs associated with preparing a submittal, attending the interviews, or negotiating the contract shall be at the expense of the respondent.

All material submitted regarding this proposal becomes the property of the City of Council Bluffs. Such materials/documents are available for public inspection after the final selection has been made. As property of the City, the City has the right to use the information contained in the submittal.

The release of information by the City to the public is subject to *Iowa Code* Chapter 22 and other applicable provisions of the law relating to the release of records in the possession of the City. Companies are encouraged to familiarize themselves with these provisions prior to submitting a proposal. All information submitted by a company may be treated as public information by the City unless the company properly requests that information be treated as confidential and cites to applicable confidentiality provisions of Chapter 22 at the time of submitting the proposal. In the event the company marks each page of the proposal as proprietary or confidential without adhering to the requirements of the Section, the City may reject the proposal as noncompliant.

The City does hereby reserve the right to reject any or all proposals, to waive informalities, and to make such awards as it shall deem to be in the best interest of the City.

The City has used its best efforts to ensure the accuracy of the information in this RFP. However, the City shall not be liable for any inaccuracies contained therein. The Firm is to

exercise due diligence and is responsible for making all necessary investigations and examinations of documents and the principles affecting performance. Failure to do so will not act to relieve any condition of the service contract agreement or the RFP or any of the referenced information. It is mutually agreed that the submission of a proposal shall be considered conclusive evidence that the Firm has made such investigations and examinations.

Any reasonable inquiry to determine the qualifications, experience, character and financial responsibility of a Firm may be conducted by the City or its agents. The submission of a proposal shall constitute permission by the Firm for the City to conduct any reasonable inquiry to determine the responsibility of the Firm. If the City deems it necessary, additional information may be requested from the Firm. The unreasonable failure of a Firm to promptly supply information in connection with such inquiry, including but not limited to, information regarding past performance, financial stability and ability to perform on schedule, may be grounds for a determination that a Firm is non-responsive, and disqualified from further consideration.

The Firm may withdraw its proposal, by written request, at any time prior to the deadline for acceptance of proposals.

Proposals may not be withdrawn for a period of sixty days following submittal deadline. The City may extend the deadline for acceptance of proposals for such period of time as it deems in its own best interests. Any proposal withdrawn after the submittal deadline may result in a suspension from eligibility to submit proposals on future City projects.

Each Firm's proposal shall be limited to one hundred (100) total 8.5 x 11 pages of content. Items not included in the page limitation include: front and back covers, tabs, table of contents, and cover letter. One electronic copy and five hard copies of the submittal are required. Proposal shall include all of the requested information in the REQUIREMENTS section. In order to facilitate RFP scoring, proposals must be organized in a manner consistent with the requirements. Each number should be referenced with the requested information.

General Selection Process

Submitted proposals will be evaluated by a committee composed of CBPL staff according to the following criteria:

1. Total Overall Cost – including initial and long term cost 25%
2. Technical, IT Configuration and Compliance with ILS/PAC/Discovery specs 25%
3. Implementation, Training and Support 25%
4. System Reliability and Capacity for Expansion 15%
5. Vendor Qualifications, Experience & References 10%

The review committee will rate the responses to each of the criteria using a five point scale:
Score Description

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0	Not Acceptable/No Response/Not available
1	Insufficient response/Does not meet needs
2	Some critical elements missing
3	Minimally meets requirements
4	Only non-critical elements missing
5	Fits needs perfectly Scoring is for evaluation purposes and the highest score does not automatically determine vendor selection.

At its option, the City may invite Firms to provide a one hour demonstration of its product. Demonstrations may be given in person or via web services.

After the demonstrations, and in consideration of all other qualifications, the City will select one or more Firms to enter into negotiations to establish a final scope of services and an appropriate fee to be paid by the City. Negotiations will be suspended from any Firm being considered and may commence with any other Firm if an agreement cannot be made. During the negotiation period, the City will not disclose any information derived from proposals submitted, or from discussions with other Firms.

The City Attorney shall prepare the final agreement between the City and the selected Firm. The selection committee will forward a final recommendation for selection to the City Council for their consideration and approval. This contract is governed by the law of the state of Iowa with venue in Pottawattamie County District Court.

REQUIREMENTS

1. Introduction & General Information

1.1 General Information about Council Bluffs Public Library

Population Served	62,316
ILS	III Sierra
Public Access Catalog	Encore
Bib Records	168,724
Items/Holdings	144167
Customer Records	17956
Annual Circulation	385,310
Branches	1
Self-Check Units	4 - 3 3M, 1 bibliotheca
AMH Units	2 - 1 3M, 1 bibliotheca
Staff Workstations	25 concurrent users
Library Website	https://www.councilbluffslibrary.org
Authority Records	97,889

1.2 Costs

Cost proposed is to include all software and recommended equipment. Use the table on pages 6-7 to indicate cost schedule for each component. Indicate payment schedule.

- If your system does not have a specific line item, indicate that with an N/A in the appropriate columns.
- Add items to the cost table if contractor determines items which do not fit into the specific categories.
- Costs for all modules and add-on functionality are to be included in the cost table.
- Costs for the initial purchase, implementation and 5 years of scheduled maintenance must be included for each item.
- CBPL may be interested in purchasing hardware independently. Indicate what hardware must be purchased through your company or if other options are available.
- Include information and costs for products and software that are in place and available at the time of bid closing.
- Products or software must be currently implemented in similar applications. No beta testing or developmental systems will be considered.

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Cost Schedule: To be included with Response

Description	Initial Implementat ion	Year 1 Support/ Maintenance	Year 2 Support/ Maintenance	Year 3 Support/ Maintenance	Year 4 Support/ Maintenance	Year 5 Support/ Maintenance
Required Modules Circulation Acquisitions PAC Cataloging Reports Serials ILL Home delivery Administration						
Point of Sale						
Digital Resource Management						
Inventory Module						
Authority Control Module						
Authority Control Processing						
EDI for Acquisitions						
SIP/SIP2/NCIP						
Youth Pac						
Offline Circulation						
Phone (analog & digital), email, and text messaging notification service						
Enhanced Record Content (Syndetics or other service)						

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Z39.50 client/server						
eCommerce for Public						
eCommerce for Staff						
Hardware purchase & maintenance						
Hardware installation						
Data migration services						
Implementation services						
Database licenses						
Database software tools						
Training						
Advanced Training (i.e. load tables, index rules, etc.)						
Other functionality/modules						
Mobile site						
Mobile app (indicate which platforms)						

1.3 Vendor Solutions

Vendors may propose more than one ILS solution (Local and Cloud hosted).

If more than one solution is being proposed, Vendor must submit separate cost analysis (pages 6 and 7) and section 14 for an alternate solution. Ten additional pages will be allowed for an alternate solution proposal.

1.4 RFID

All vendors must provide information regarding the compatibility and the integration of 3M/bibliotheca RFID with their solution. RFID currently used include:

- 3M ISO/ ISO Security for RFID Tags
- 5 Staff RFID Workstations
- 2 AMH Units

1 Security Gate Unit

1.5 Proxy

All vendors must provide information regarding proxy use of the system to allow patrons to library provided resources such as NewsBank, etc. Proxy must also support https.

1.6 Integration of Third Party Applications

All vendors must provide information regarding the compatibility and the integration of 3rd party products with their solution. Verification of compatibility with the following products is required:

Overdrive - This product connects to our catalog using a Patron API interface.

Envisionware –We use it to authenticate users of our public access computer systems (including print services) and to pay for printed materials using a coin and bill acceptor.

This product connects to our catalog using a Patron API interface.

Hoopla Digital – This product connects to our catalog using a Patron API interface.

Research Databases - A variety of services from vendors like Gale, EBSCO, Credo, etc.

OCLC Worldshare - Interlibrary loan system

Wordpress - Website integration

Content Cafe - Provides cover art images in Sierra & PAC

State Vendor's compatibility capabilities with the following:

Omeka or ContentDM - Publishing platform for historical documents and images

Baker & Taylor – Library material vendor

Bound to Stay Bound - Library material vendor

RBdigital -Magazines, ebooks, online audio books.

Online Registration – Program & room reservation software

Other applications that connect using industry standard protocols

2. Key Functionality Requirements

Review the information in the following sections. Answer all specific questions and provide a general overview of the capabilities and functionality within your system in regards to each area.

For each area, please describe how your company and ILS will help us achieve these goals.

2.1 Discovery Catalog.

CBPL customers are accustomed to searching websites like Google and Amazon and expect our online catalog to have similar functionality. Our preference features similar to:

- Google-like “did you mean” suggestions when searching – on both the public and the back-end staff sides
- Amazon-like recommendations– i.e., “others who checked that book out also checked out these items.”
- Faceted searching and the ability to limit searches to specific requirements without the need to refresh the whole search or facet.
- Customizable, intuitive ‘My Account’ features.

- Logins that can be changed from barcode to a word/phrase. Browser login/password tools should be able to save login information for customers.
- The ability to change personal information and limit what information can be changed, view holds, requests and fines, pay fines, and post comments/reviews.
- The ability to create and maintain lists of items and have the ability to publish a list elsewhere – for example, on blogs, Facebook, etc (similar to Amazon’s wish list).
- The option to write reviews and rank items in the collection.
- RSS feeds, e-mails, and SMS text messaging alerts for saved searches, authors, and subject headings.
- The ability to email/Reddit/Facebook/Tweet individual items in the catalog.
- The flexibility to add embedded search box widgets to other pages/sites/tools.
- The ability to embed book recommendation carousels and other widgets on webpages.
- Added catalog features such as cover art, Lexile levels, read-alikes, series details, and/or summaries.

2.2 Mobile functionality.

CBPL serves a diverse population and requires the ability to serve those customers anywhere: in the library, when they are at home, or when they are using a mobile device. The ILS must offer a mobile interface (either app or mobile website) that allows customers to browse the catalog, check out items, place holds, pay fines, check their library account. This mobile functionality should be cross-platform (iPhone, Android, Blackberry, etc).

2.3 Payments/fines.

We want our customers to be able to pay fines and fees at the library, through a self-check machine, or online 24/7. We are particularly interested in allowing customers to pay fines online, even when their account is blocked. What is the Vendor’s capability of integration of the PAC that can handle credit and debit card transactions in the library and online.

2.4 Technology Requirements.

The ILS should be fully functional on all modern web browsers that support a combination of standards-based and de facto HTML and XHTML, which should be rendered in the same way by all (i.e., Safari, Firefox, IE, Edge, Chrome, etc.).

2.5 Data and Reports.

The Library is data-driven and utilizes reports from the ILS to provide necessary information. The ILS system must provide clear, concise reports that do not require editing for readability or printing. CBPL requires standard reports that staff can easily run on demand, as well as the ability to customize reports related to budget, collection, acquisitions, customer usage, and circulation. Data from our system should also be accessible through the use of SQL statements.

2.6 Proven History Working With a Library of Similar Size.

The ILS must have a positive record of handling libraries of this size and complexity. Provide references of at least three systems that are currently operating your ILS which are similar to CBPL in size, type and complexity.

3. Acquisitions

CBPL requires an ILS which will assist library staff to create and maintain an efficient workflow, utilizing as many automated features as possible to handle our purchasing needs.

Respond to each item and include any general information about this module in your response.

3.1 What sets your acquisitions module apart from the other ILS vendors?

3.2 Does your ILS automatically manage encumbrances and expenditures based on acquisitions activities like ordering, receiving, cancelling and invoicing? Does this happen in real time?

3.3 Can CBPL users navigate between the acquisitions module and other work areas such as circulation and cataloging seamlessly without signing in to a separate module? For example, can holds be placed on newly ordered items directly from purchase orders?

3.4 Does your system allow the library to completely customize its own fund structure? Can budgeted amounts be changed or money transferred between funds at any time? Can orders be placed from over-spent funds?

3.5 Does your ILS support rolling over funds at the end of a fiscal year, including the option to roll over only encumbrances? Does your ILS support operating from two fiscal years simultaneously (so staff can order from a new fiscal year while expending from an old one)?

3.6 Does your ILS provide built-in fund reporting that includes categories such as amount budgeted, amount encumbered, amount expended, and amount uncommitted? In addition to any built-in fund reports, does your ILS provide the ability for users to create their own customized fund reports?

3.7 Does your ILS allow customers to place hold requests on in-processing and on-order items? Does it transfer those holds when overlaying a complete MARC record on an on-order bib record during cataloging?

3.8 Does your ILS detect duplicate orders?

3.9 Does your ILS include reporting that assists in collection development, such as: reports for items that have circulated heavily and may need to be replaced? Bibs with numerous holds that the library may want to order more of (purchase alerts)?

3.10 Will open orders placed prior to switching to your ILS be migrated? Are there any acquisitions data (vendor records, past invoices, etc.) that will be impossible to migrate to your ILS?

3.11 Please describe the recommended workflow using your ILS for acquiring and receiving materials, including ordering, budget encumbrances and reconciliations, importing bibliographic order records, receiving materials, and reporting.

4. Cataloging

CBPL is interested in streamlining the cataloging process to make it as efficient and as accurate as possible. Areas of interest include: the ability to manipulate/customize information which is displayed or hidden in the PAC, the ability to easily edit individual or batch bibliographic and authority records, and the ability to add, transfer, or remove records.

Respond to each item and include any general information about this module in your response.

4.1 What sets your Cataloging module apart from those of the other ILS vendors?

4.2 Describe the recommended workflow to optimize staff efficiency for loading and updating bibliographic records using OCLC's Connexion (individually and in batch), loading new and updating authority records, loading/overlaying bibliographic records, and updating authority records.

4.3 Does your system handle order acquisition records in such a way that customers can place holds on them? Does this allow for easy overlay with OCLC records? How are holds managed if records need to be merged?

4.4 How does your ILS manage importing records from OCLC or through EDI? Does your ILS support a variety of import templates, including item level information mappings?

4.5 Describe how Resource Description and Access (RDA) works in your ILS.

4.6 How are bibliographic records deleted, both individually and in batch?

4.7 How, if at all, do displays and searching differ for staff and customer queries? Are searching and indexing the same for staff and customer searches?

4.8 How is call number information transferred to the item information?

4.9 How are global changes made to bibliographic records? Are there any restrictions?

4.10 What is the recommended printing procedure for batch and individual labels with your ILS? What is the recommended printer equipment setup for printing spine labels?

4.11 How are electronic books, magazines, and journals handled in your system? Do they require the creation of item/copy records to be visible?

4.12 Does your ILS allow for duplicate call numbers? Explain any restrictions.

- 4.13 How are imported items overlaid onto existing records?
- 4.14 Does your system allow staff to make selected changes to item records without requiring access to the full item record?
- 4.15 Does your ILS support standard cut, copy and paste commands for MARC record editing? If not, what options are available to perform such functions?
- 4.16 Does your ILS supply original cataloging templates containing required and recommended bibliographic fields? Can these templates be modified by library staff?
- 4.17 Describe what authority cleanup services your company provides. Are these included in the standard maintenance cost or are they extra?
- 4.18 How does your ILS check and validate URLs in bibliographic records?
- 4.19 Does your ILS allow for the creation of unique collections or groups of items and offer the ability to easily roll back those items to their original collections at a later date?
- 4.20 How does your ILS manage withdrawing and deleting items that have holds or are in lost or missing statuses? Does your ILS provide notification to the patron that their request cannot be filled?
- 4.21 How does your ILS restrict holds on unavailable item and bibliographic records?
- 4.22 Describe how your ILS will transition to linked data and BIBFRAME.

5. Circulation

Circulation interactions are a crucial point of contact with our customers and can foster lifelong relationships between staff, customers, and the library. The Circulation module plays a large role in the overall customer experience. We utilize a code 39 Fourteen digit patron barcode physical card and Fourteen digit item barcode with RFID tagging in all items. We need a system that can be flexible, untethered, and nimble and are looking for an ILS that is intuitive, user friendly for staff, and aids in a positive library experience for customers.

Respond to each item and include any general information about this module in your response.

- 5.1 What sets your Circulation module apart from those of other ILS vendors?
- 5.2 How is your circulation module user friendly and efficient for both customers and staff?

5.3 Describe how your system supports outreach services, including offsite circulation, customer enrollment, and card issuing, such as at a bookmobile location or single, offsite program. Is the off site functionality real time?

5.4 Describe the process for status changes. Can the status of an item be changed at check-in (for example to damaged status)? Can many items have their statuses changed in a batch either by entering barcodes or through pulling up an attribute of the item (such as collection code)? Where in the ILS can status changes take place? Is there a limit to the number of statuses?

5.5 Does your ILS have the ability to keep a customer's history (fines, items circulated, etc.)? Can we choose to not keep that information to protect confidentiality? Describe any limitations.

5.6 What e-commerce capabilities are available? Can staff or customers use debit or credit cards to pay fines and fees? What payment gateways are compatible with your system?

5.7 How does your system handle statistics from circulation transaction points such as bookmobile, self-check units, homebound modules, and other library locations?

5.8 Describe how your system supports linked "family" accounts, including how notices and holds are handled and how common information is updated across multiple accounts.

5.9 What fields in the customer account are searchable? Please indicate at what level they are searchable (all staff, only with special permissions, only with a SQL statement)?

5.10 Describe your notices capabilities, including notice types, offered languages, and delivery methods. Is there a character limit or prescribed format for your notices? Can the library create specific notice types individual to CBPL? Can we put our logo on them? Can text be customized to specific patron types? Notices that are required are courtesy notices, at least 3 levels of overdue notices, at least two billing notices, hold notice, card expiration notice. Are these able to auto-generate and auto-send?

5.11 Describe your ILS's offline circulation capabilities.

5.12 Can circulation functionality be accessed from any modern browser, including a tablet or mobile device? Is it HTML5 compliant?

5.13 Describe the configurability and customization of check-out receipts. Can they be emailed?

5.14 Can your ILS create a block that allows a SIP protocol to prevent reservations of public computers?

5.15 Describe how your system allows for online customer registration. Is a full barcode issued?

- 5.16 Describe how your ILS administers and supports interlibrary loans.
- 5.17 Does your ILS have the ability to modify check-in and due dates?
- 5.18 Does your system allow staff to create pop-up notifications on customer records? Does your system allow staff to enter notes into the patron records that are only viewed by staff?
- 5.19 Describe how your system allows for the ability to globally edit selected customer records.
- 5.20 Can we create customized patron fields? Can they be searchable?
- 5.21 Does your system have the ability to send information through texts? If so, what information is available to be sent this way? How do customers indicate that they would like this option? Are there any charges associated with this service?
- 5.22 How does your system handle lost items? What does the interface look like when a lost item is returned? Describe how processing fees and fines are handled with a lost item or a lost item returned. How does your ILS credit customer accounts when they return a lost item they paid for?
- 5.23 How does your system work with accounts that are sent to a collection agency? What indications are available to indicate an account in the collections process? How much staff intervention is needed to make this collaboration work?
- 5.24 CBPL prints specialized hold IDs for customers to pick up items on reserve. How would your system accommodate these?
- 5.25 What options are available for generating lists of requests on checked in items? How does your system handle generating lists of hold items that have expired? What information is available to staff to view on these lists?
- 5.26 CBPL regularly purges inactive customers. What options are available for purging customer records? What parameters is the library able to access to set up a purge?
- 5.27 CBPL offers cards to organizations in addition to individuals. What options are available for customizing card types?
- 5.28 CBPL has a computer use only account type. How would your system address non-borrower accounts?
- 5.29 CBPL will have an Automated Material Handling System (AMHS). List two libraries that are using your system in conjunction with an AMHS and include contact information for both.

5.30 CBPL would like customer accounts to “expire” at a certain interval to enable regular address checks and payment of charges. How would your system accommodate this? Is there an option for customers to renew their account online? Is there the capability for patrons to be automatically notified when their account will expire soon?

5.31 How does your system handle lost cards on an account? What is the method for accessing the account if a customer’s barcode is declared lost?

5.32 List all options for front-line staff’s ability to search for customers in the system. Are all parts of a customer account searchable (for example, address, city, birthdate, email, phone number)?

5.33 List all options for batch changing of information in multiple library accounts.

5.34 CBPL prefers to maintain multiple addresses for our patrons (for example – current address, parent’s address, PO box, physical address). Does your system allow for the saving of multiple addresses to one account?

5.35 It is imperative that staff be able to view the last customer to check out an item in cases of damage or missing pieces. How does your system accommodate this need?

5.36 CBPL currently allows one renewal for customers and staff. What options are available regarding renewals including establishing rules, overriding renewals, customer online renewals, and renewals when customers are over their maximum fines? Do you have an auto-renew feature?

5.37 Does your ILS support multiple active emails and SMS text capabilities on patron accounts (for example- can a single hold notice be sent to multiple email accounts)?

5.38 Does your system support have a picture of the patron in their account? If so, how is the picture captured by staff?

5.39 Can different loan rules be applied to different patron types?

5.40 Does your ILS support having multiple codes assigned to a single record? Is there a limit to the number of codes that can be created?

6. Inventory Control

We are interested in an inventory control module to help manage the collection.

Respond to each item and include any general information about this module in your response.

6.1 What sets your Inventory Control module apart from those of other ILS vendors?

6.2 Describe your system's inventory control process.

6.3 What options are available for mobile inventory—for example, using a tablet and barcode scanner to perform inventory on the fly in the stacks?

6.4 Does your inventory module work with both barcode and RFID?

7. Public Access Catalog (PAC)

Our current PAC has limitations and is not intuitive to our customers. We would like a PAC that offers searching capability mentioned in Section 2 and has these options included in the base package, not as add-on services.

Respond to each item and include any general information about this module in your response.

7.1 What sets your PAC module apart from those of other ILS vendors?

7.2 Section 2.1-2.3 in Key Functionality Requirements, mentions some very specific functionalities we need to meet our customer demand. How will you help us meet each of those customer demands?

7.3 Can a customer log in to their account at any time while searching the catalog? Can they perform searches, place holds and be able to toggle back to their account information without needing to log in multiple times? Does their log in time-out or must they physically log out? What information is displayed in the PAC to indicate that a user is logged in? Are they notified prior to logging out/being automatically logged out due to inactivity?

7.4 Does your PAC provide faceted searching to allow users to narrow their results? What kinds of facets are available? How many facets are available? Can the library customize the facets made available and where they display in the PAC?

7.5 We prefer a PAC that produces identical search results to back-end staff searches in the ILS. Describe how your system meets that need.

7.6 We need a way for staff to log in to the public-facing side of the PAC and get more information than a customer (i.e., information on specific items like recent status updates). How will your system help us meet those needs?

7.7 Are there persistent links (permalinks) to specific items in the catalog?

7.8 Our customers want the ability to change their login information from the library card number to an easy-to-remember username/password combo. Describe how your system will help us meet this customer need. How can usernames/passwords be recovered if forgotten?

7.9 We prefer an “easy” search box – a single text box and a search button – that provides true keyword searching for the whole record. That easy search box needs to be embeddable, so we can easily embed it into other places, like our library’s website, another website, a blog, or a Facebook Page. The search results should use sophisticated relevance ranking and sorting options. How will ILS and PAC achieve this?

7.10 We prefer a PAC that can be customized. What customizability does your PAC offer?

7.11 We prefer the ability to include a list of books from a specific author or subject heading listed on our website, and have the list automatically update as we add new items to the collection. We prefer the ability to prominently feature and promote new materials automatically as they are added to the collection. We also want this functionality to be incorporable with other web services like Facebook Pages and Profiles. How will your ILS help us achieve that functionality?

7.12 We need a PAC that can handle credit and debit card transactions in the library and online. We are particularly interested in one that allows customers to pay fines online even when their account is blocked. How does your system meet these requirements? Are individual fines able to be selected or are customers able to make partial payments?

7.13 We prefer a PAC that allows us to set the bibliographic data that appears in the search results screen, choosing from all MARC fields and subfields, and will let us prioritize the order of the display. Describe how your ILS allows this.

7.14 We would like the ability to customize wording and default messages/displays in the PAC. Describe the ease and customizability of your PAC.

7.15 We would like a PAC that provides ebook integration. What third party vendors does your PAC support? Are integrations included in the PAC pricing or an additional cost?

7.16 What federated, aggregate, meta, or distributed searching capabilities are available through your PAC? Is this included in the PAC pricing or an additional cost?

8. Home Delivery

CBPL provides outreach services to both homebound individuals and adult and juvenile care centers. This is an important part of our service to customers that are unable to use the physical library.

Respond to each item and include any general information about this module in your response.

8.1 What sets your home delivery module apart from those of other ILS vendors?

8.2 Can the home delivery module be used on mobile devices such as an iPad? For example, when staff is out visiting a customer could they pull up the reading history of the customer or enter notes into the customer profile?

8.3 We would like an ILS that allows staff to set up suggested reading, RSS-like searches for customers, allowing staff to provide items tailored to each customers' preferences while saving staff time. Describe how proposed system will accomplish this.

8.4 We would like a system that allows for customization of home delivery patron types and individual records. Some examples of this might be the ability to set a checkout length of time for all home delivery accounts, have no fines for home delivery customers, and track next visit date in the ILS system.

8.5 What alerts are available to indicate that a customer has already had a specific title when staff are checking out to a home delivery account? Do the alerts list the last check-out date for that title to the customer?

8.6 Can the due date be set for a whole session?

9. Inter-Library Loan (ILL)

9.1 How is your ILL module user-friendly and efficient for staff?

9.2 Does your ILL module communicate with OCLC Worldshare and/or SILO (State Library of Iowa) ILL system.

10. Serials

10.1 How is your Serials module user-friendly and efficient for staff?

11. Systems/IT

CBPL is making significant investments in the technology infrastructure. We need an ILS that is flexible and intuitive to meet our staff and customers' needs.

Respond to each item and include any general information about this module in your response.

11.1 What sets your system apart from those of other ILS vendors?

11.2 Can we locally host both your ILS and PAC? If not, describe what options are available.

11.3 We prefer the ILS to operate in a virtual server environment. Describe how your system meets those needs.

11.4 Does your catalog support the Z39.50 protocol? If so, what version of the standard is currently supported?

11.5 Name all of the protocols supported, including EDI/X.12, FTP, SMTP, HTTP, SIP and others, as appropriate.

11.6 We prefer the ILS solution to be deployed on Linux. Indicate the recommended versions and configurations for your ILS.

11.7 Describe your ILS solution's hardware requirements and server license requirements for both production and testing environments. Is the library required to purchase hardware from you?

11.8 List the primary browsers supported by your solution and the minimum supported version of each, and describe any other staff PC requirements to run your ILS.

11.9 Does your system have a fully functional staff client running on iOS, Android, or Windows RT? Are mobile sessions encrypted between the mobile client and host?

11.10 Describe your browser and desktop staff client options.

11.11 Describe your ILS's administrative control rights and permissions for staff accounts.

12. Third Party & Locally Developed Products

We utilize third party and locally developed applications. We prefer an ILS be interoperable with current third party applications if a comparable feature is not offered in the new system.

Below is a list of products integrated with our current ILS. Describe how your system interacts with each of these products and services. If your system offers an alternative to these third party products, please describe. Are there any potential issues with your ILS system and our current third party systems that we should know about?

12.1 Is your system SIP compliant? Do new SIP connections have an additional cost? Who creates those SIP connections? How long does the process take? Some of our SIP connections require passwords – can your SIP connectivity do that?

12.2 Overdrive

12.3 3M/Bibliotheca Self-Check machines (four total)

12.4 RFID Library Solutions Automated Materials Handling Systems (two total)

12.5 3M RFID tags (3M ISO)

12.6 Envisionware Print and PC Management

12.7 Hoopla Digital

13. Vendor Information

13.1 Company Information

Provide the following: Home office address, number of years in business, name, title, telephone, email, etc for primary contacts for the proposal.

13.2 Company Future

13.2.1 Is your company currently for sale or involved in any transactions to expand or to be acquired by another organization? If so, please explain.

13.2.2 Has your company been involved in a merger, acquisition, or reorganization in the last five years? If so, please describe.

13.2.3 Describe your company's philosophy regarding product development. Are annual roadmaps published for customers to review? What percentage of those dates are successfully met? What percentage of annual development originates from customer enhancement requests? What are the mechanisms for customers to submit requests and how does the company evaluate and incorporate them into development plans? How many versions has your company released for the proposed ILS in the last two years? What percentage of your clients are running the most recent update?

13.3 Migration and Training

13.3.1 Provide an implementation and training schedule that would allow us to go live with your system. What is the earliest date you believe to be feasible, explain the reasons and provide your ideal timeline

13.3.2 What data, if any, cannot be migrated to the proposed ILS?

13.3.3 Can customer "my lists" and current community resource database information be migrated to your ILS?

13.3.4 Does your company provide any assistance with PAC design and implementation?

13.3.5 Does your company provide on-site training for the system? Do you offer off-site or web-based training? Please describe what options are available and the costs involved with each option.

13.4 Support

The vendor must guarantee support for current releases of all databases and operating systems for the first twelve months after the release. An ongoing annual contract for support and maintenance will be maintained.

13.4.1 Do you have 24/7, 365 days-a-year customer support?

13.4.2 Describe your customer support structure, hours and resources for hardware support, operating system support and application/data support.

13.4.3 What are the hours and days of your live telephone support?

13.4.4 Describe your online support portal.

13.4.5 What technical assistance is available from your company for maintaining the ILS and server software? Do you provide consulting support for operating system and ILS software upgrades?

13.4.6 Describe the mechanism for reporting and resolving issues with the system.

13.4.7 What kind of training opportunities are available for staff hired in the future after the initial migration training?

13.4.8 Describe the make-up and governance of your ILS user group.

14.SaaS (Hosted) Option

14.1 Vendor must have NIST (National Institute of Standards and Technology Special Publication 800-53) accreditation, ISO 27001, or equivalent for all SaaS services and hosted products. If not, please explain.

14.2 Vendor must hold the TRUSTe seal or equivalent for web application privacy. Vendor's SaaS services must be accredited to TRUSTe's TRUSTed Cloud or equivalent, which includes privacy reviews to stakeholders' requirements—FERPA in this case. For further details, refer to <https://www.truste.com/>). If not, please explain.

14.3 Where is the hosting facility located?

14.4 The hosting facility must have a backup power supply available. Describe.

14.5 The facility must have a fire suppression system in place. Describe.

14.6 The facility must have a climate control system, including humidity controls. Describe.

14.7 The facility must have access restrictions, security guards, etc. Describe the physical security.

14.8 What is the recommended bandwidth for a hosted solution?

14.9 Backups must be performed by the vendor on behalf of the Library. Describe the frequency and process.

14.10 Regarding administration in general, what responsibilities does the Library have and what responsibilities does the vendor have?

14.11 What uptime can the Library expect from your hosted solution?

14.12 What hosting experience do you have? (How many years have you been hosting customers; how many customers do you host?)

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