

REQUEST FOR PROPOSAL: INTEGRATED LIBRARY SYSTEM



**ISSUED BY:
YPSILANTI DISTRICT LIBRARY**

**PROPOSALS ACCEPTED UNTIL
APRIL 14, 2023, 5:00pm**

**CONTACT:
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REQUEST FOR PROPOSAL

March 6, 2023

OVERVIEW

Background

The Ypsilanti District Library (YDL) is seeking proposals for a new Integrated Library System (ILS).

Based in Washtenaw County, Michigan, YDL has a service population of 88,021 and operates a bookmobile and three buildings, one in each of the municipalities it serves (Ypsilanti Township, the City of Ypsilanti, and Superior Township). Additionally, YDL conducts extensive outreach at various events throughout the community. YDL is a Class VI district library with an elected board of trustees and an annual operating budget of approximately \$6 million. YDL is a member of The Library Network (TLN) cooperative, but operates an independent ILS system. In addition, our patrons frequently utilize the Michigan Electronic Library catalog (MelCat), lending and borrowing approximately 1,000 items per month, respectively.

Borrowers and Existing Collection

YDL has 32,220 active patrons, which is 36.6% of the legal service area. There are approximately 45,000 existing borrower records. Circulation data for 2022 was 428,678, of which 35.39% was digital download/check out. There are approximately 246,000 volumes in the current physical collection, and collection expenditures in 2022 were nearly \$470,000. In addition to traditional print and AV materials, YDL circulates a variety of ephemera in its "Library of Things" collection, including hotspots, sewing machines, play kits, radon detectors, etc. YDL does not collect late fees, but charges for copies, faxing, and missing or lost material.

Current ILS

YDL is currently utilizing Horizon by SirsiDynix with an Enterprise discovery layer. Modules and services include Circulation, Acquisitions, SIP2, eRC, quarterly authority control, syndetics, and Blue Cloud Mobile. There are approximately 218,175 bibliographic records and 1,005,700 authority records. YDL does its cataloging in-house using OCLC Connexion Client. Many records are also batch downloaded from Baker and Taylor and Midwest Tape. The classification system in use is the Library of Congress, and records are a hybrid RDA/AACR2 (mostly GMD retention) for MelCat compliance. YDL utilizes RFID technology and Standard, Code 3 of 9, Mod 10, 14 digit barcodes.

YDL is currently writing a new strategic plan, with Dynamic Resources and Discovery being a key element for future change.

Workstations and Staff

There are 86 staff terminals across all YDL buildings and 129 public computers. Eleven (11) of these are dedicated OPACs. YDL has 66 staff members, 23 of whom hold an MLS.

INSTRUCTIONS

The successful proposal must include documentation for all six sections: Background, Table 1, Table 2, Special Project Plan, Vendor Integrations, and MelCat. Proposals must be received by 5:00pm, April 14, 2023. Late proposals will not be accepted. Proposals must be submitted both in hard copy (6 copies) and electronic pdf format:

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Ypsilanti, MI 48197

lisa@ypsilibrary.org

Questions are welcome to the email above or by telephone: 734-879-1300. If the question materially affects the RFP specifications, all vendors will receive copies of the question and response without identification of the source of the question.

TIMELINE

YDL intends to review proposals, trial public catalogs offered as references by the vendor, and contact vendor references by April 30, 2023. Final candidates will be asked to travel to YDL at their own expense for a presentation of the system and a Q&A session with lead staff.

SELECTION CRITERIA

YDL will award the contract to the firm who can best meet the library's current needs and future goals per their responses to the RFP components below. The Board of Trustees of the Ypsilanti District Library reserves the right to reject any and all responses to this Request for Proposal, in whole or in part, and to waive informalities and minor irregularities in quotations received.

In evaluating bids, the following will be taken into consideration::

- Suitability of system specifications to library needs
- Implementation timeline

- Cost, including additional modules or products in development
- Experience with and commitment to public libraries
- Vendor viability and financial strength
- References from existing clients
- Ability to retain existing data and metadata during implementation
- Perceived value of training and documentation
- Perceived value of technical support
- Consideration of future development
- Compatibility with existing/desired vendors
- Ability to integrate with MelCat

SECTION 1 REQUIREMENTS

All questions must be answered, even if the answer is “N/A.” Do not exceed 20 pages.

1. Describe the business, including its history, origin, and any affiliation with other corporate entities.
2. How many full-time staff does your firm employ? Please include a copy of your firm’s organizational chart.
3. What type of team will be assigned to this project? What will each person’s role be? Please include a brief background summary for each key staff member assigned to this project.
4. Describe the business’s involvement with library-related organizations.
5. Provide financial data sufficient to illustrate the business’s financial stability.
6. Describe the development process and any future roadmaps currently in progress.
7. Describe your experience, if any, migrating
7. Describe any user groups, Listservs, or product forums available to customers.
8. Provide the web addresses and contact information for at least 3 libraries utilizing your product.
9. If your business is currently in litigation, please explain.
10. If your company is currently for sale or involved in acquisition by another company, please explain.
11. Describe if your proposal is either a (1) server solution or (2) software as a service (SaaS) solution. Include server requirements or security measures.
12. Provide a minimum of 3 references for public libraries currently using your ILS. References must be for libraries of a similar size (Class VI in Michigan) and operating an independent system (not cooperative). References from Michigan public libraries are preferred.
13. Provide a detailed timeline of the proposed implementation.

SECTION II REQUIREMENTS

TABLE 1

While not all modules below may be selected by YDL, please provide a cost breakdown for each element per year. Proposals must state that they are valid for a period of at least six (6) months from the closing date. Additional information about each item below must be described further in Table 2. Vendors must designate an item as “Not Available” (N/A) or “In Development” (I/D) if applicable. Vendors may use a “See Ref” for items included in other modules.

Module	Initial Implementation Fee	Year 2 Cost	Year 3 Cost
Acquisitions			
Administration			
APIs			
Authority Control			
Cataloging			
Circulation			
Community Outreach / Patron Engagement			
Data Migration			
Digital Asset Management			
eCommerce			
EDI for Acquisitions			
Enhanced Record Content			
Floating Collections			
ILL			
Inventory			
Mobile App			
NCIP			

OPAC			
Phone Notification			
Project Management			
Reports			
Serials			
SIP2			
System Monitoring			
Training			
Z39.50 client/server			
TOTAL			

**SECTION III REQUIREMENTS
TABLE 2**

This table is for the vendor to share relevant information to the costs in Table 1. For instance, if your fees for the Administration module reflect a limit of 4 users, include that here. Likewise, if your module includes unique features, such as a children’s catalog within the OPAC module, include that here. The vendor does not need to respond to each example given. In short, tell us what you would like us to know about each element of your product. Please limit each category to no more than three pages.

Acquisitions	Describe any special features, limitations, or exclusions to implementation such as fund accounting, vendor tables, financial reporting, EDIFACT, deletion of defunct collection codes/item types, note features, special reporting features, ability to edit budgets at invoicing, other.
Administration	Describe any special features, limitations, or exclusions to implementation such as limits to admin accounts, limits to staff groups/classes, limits to item types, borrower classes, customization of MARC maps, ability to customize menus by login, special templates or cloning features, ability to customize function keys or short cuts, any drop and drag features, special security settings, other.

APIs	Describe any special features, limitations, or exclusions to implementation such as excluded industry vendors, limits on quantity, maintenance fees and schedules, other.
Authority Control	Describe any special features, limitations, or exclusions to implementation such as local MARC maps, the need for the system to go offline, RDA additions, retention of GMD, reporting features, other.
Cataloging	Describe any special features, limitations, or exclusions to implementation such as web-based utilities, syntax and validation tables, workforms, record import, OCLC or Worldcat integration, batch deletion/edits, spine label printing utilities, keyboard shortcuts, special vendor integrations, other.
Circulation	Describe any special features, limitations, or exclusions to implementation such as mobile circ, self-check, customizable/programmable receipt printing, retention of check out history, account linking, patron photo ID, MI smart ID swipe/import, offline circulation, texting notifications, online card application with GIS mapping, limits to staff notes fields, ability to merge patron records, duplicate borrower notices, auto-renewal notification features, marketing opt-in/outs capabilities at registration, expired hold processes, location and transit status features, minors coming-of-age reporting, other.
Community Outreach/Patron Engagement	Describe any special features, limitations, or exclusions, such as email/SMS messaging, online patron registration, event management, patron analytics and segmentation, collection analytics, campaign features, personalization/branding, opt in/out features, newsletter capabilities, room booking, website management, other.
Data Migration	Describe any special features, limitations, or exclusions to implementation such as metadata retention, error reports, Melcat considerations, patron notes, fines, checkouts, transit status, patron lists, checkout history, circulation data, other.

Digital Asset Management	Describe any special features, limitations, or exclusions, such as might be used for local collections, such as zines, podcasts, or items in a “things” collection.
eCommerce	Describe any special features, limitations, or exclusions to implementation such as minimums, POS integrations, receipting, vendor integration (Envisionware, other), app integration, other.
EDI for Acquisitions	Describe any special features, limitations, or exclusions to implementation such as vendor limits, quantity limits, serial claims features, editing/deleting/copying profiles, other.
Enhanced Record Content	Describe any special features, limitations, or exclusions to implementation such as number of vendor limits, custom content/images, edition overlays, other. Please provide a list of RDA images.
Floating Collections	Describe any special features, limitations, or exclusions, such as bulk edits, performance reports, balancing features, other.
ILL	Describe any special features, limitations, or exclusions to implementation such as custom notifications, barcode import, required peripherals, other.
Inventory	Describe any special features, limitations, or exclusions to implementation such as stack readers using RFID technology, custom and standard reporting, auto-check in, other.
Mobile App	Describe any special features, limitations, or exclusions to implementation such as multiple channels, push notifications, youth versions, material carousels, other.
NCIP	Describe any special features, limitations, or exclusions to implementation such as excluded industry vendors, limits on quantity, maintenance fees and schedules, other.
OPAC	Describe any special features, limitations, or exclusions to implementation such as browser compatibility, mobile web, touch screens, filters, limits, customization, patron lists, new material carousels, ADA

	accessibility, languages other than English, diacritic capabilities for international language collections, integration with Good Reads, Novelist, bestseller lists, shelf location display on original hit list, text/email me features, printability, patron customized lists and circ history capabilities, EDI or diversity tools, patron-directed PIN edits, other.
Phone Notification	Describe any special features, limitations, or exclusions to implementation such as daily reports, other.
Project Management	Describe any special features, limitations, or exclusions to implementation or support, such as the number of hours or personnel, remote session assistance, on-site implementation, other.
Reports	Describe any special features, limitations, or exclusions to implementation such as importing back data, simultaneous users, custom criteria, most popular materials lists, customization features, yearly limits or data retention, other.
Serials	Describe any special features, limitations, or exclusions to implementation such as third-party integration (WT Cox, Rivistas), claims, missing issue reports, check-in and receipt capabilities, other.
SIP2	Describe any special features, limitations, or exclusions to implementation such as excluded industry vendors, limits on quantity, maintenance fees and schedules, other.
System Monitoring	Describe any special features, limitations, or exclusions to implementation such as auto-harvests, down-system alerts, system rebuilds, reports, back-ups, other.
Training/Support	Describe any special features, limitations or exclusions to implementation such as number of on-site hours, written v. online guides and printability, ticketing platform, number of staff, day-of-launch on site option, other.
Z39.50 Client/Server	Yes or No and relevant details.

Please describe additional product modules not listed above and include pricing for years 1-3.

SECTION IV REQUIREMENTS

Special Project

YDL is embarking on a new collaboration with one of our local school districts. We intend to offer a library card to every student in our school district, unless a parent opts out. To this end, intentions are currently to import student IDs. Please describe both (1) your experience with similar projects, and (2) how your firm would recommend we proceed with this initiative, including relevant details such as over laying existing records, importing new data, updating records, SIP considerations, other.

SECTION V REQUIREMENTS

Vendor Relationships

YDL has or desires relationships with many vendors across the industry. Not all vendors can, or are expected to, integrate with a new ILS. Some, however, have either formal or informal agreements, or else the ability to interact with a product's data in some way. Please respond to each vendor outlined below, including whether a relationship is formal (F), informal (I), in progress (IP), none (N). For relationships that are formal, informal, or in progress, please provide details on how your product functions with the vendor. For vendors whose product would generally be replaced with one of your ILS modules, please provide comparable details.

Vendor	Relationship	Implementation Fees	Comments
Baker and Taylor			
Bayscan			
Communico			
Ebsco			
Envisionware			
EZ Proxy (cloud)			
Gale			
hoopla			
Kanopy			
Library IQ			

Mailchimp			
Midwest Tape			
My Promo Receipt			
OCLC			
Overdrive			
ReadSquared			
Recite Me			
Sensource			
Social Explorer			
Springshare			
Syndetics			
Unique			
WordPress			
Wowbrary			
WT Cox			

SECTION VI REQUIREMENTS

Melcat

Participation in the Michigan statewide resource sharing and discovery system known as MeLCat (<http://mel.org>) is very important to our patrons. MeLCat currently uses INNReach software.

Please describe in detail how your solution integrates or not with MeLCat, including:

Patron authentication and integration

- Please describe how our patrons and staff will utilize MeLCat in your system.
- When requesting items via MeLCat, will patrons authenticate directly against the local system's database?
- If not, how will the patron data be provided to MeLCat?
- Will requests, holds, and checkouts be visible and manageable in your system?

- Will MeLCat lending and borrowing functions be an integrated staff feature?

Bibliographic and item holdings exports

- Please describe how our bibliographic and item holdings data will be exported for contribution to MeLCat.
- What format will be used?
- How will holdings be updated?

You must specify whether you utilize a D2IR API, and whether it is certified with Innovative or NCIP. You must also state whether this is in process, not planned, or is sunsetting. Please note that responses to this portion of the RFP may be shared with MeLCat technical staff for evaluation.

For general technical requirements for MeLCat participation, see:

<https://www.mcls.org/mel/melcat/joining-melcat/melcat-technical-requirements/>

