



## PALOS VERDES LIBRARY DISTRICT

### REQUEST FOR PROPOSAL INTEGRATED LIBRARY SYSTEM

**Issued:**

September 12, 2018

**Proposals due:**

October 19, 2018 5:00 PM PST

**Submit Proposals to:**

David Campbell

[dcampbell@pvld.org](mailto:dcampbell@pvld.org)

## TABLE OF CONTENTS

Introduction	3
General Information	3
RFP Contact Information	4
Terms & Conditions	4
Timeline	4
ILS Connected Services	5
Cost Proposal	6
OPAC	7
Circulation	8
Reports	10
Cataloging	10
Serials	11
Acquisitions	11
System, Server & Software Functionality	12
Migration, Support & Training	13
Evaluation & Selection Process	13
Deliverables	14

## INTRODUCTION

Founded in 1929, PVLD is an autonomous special district library governed by an elected five-member Board of Library Trustees. PVLD is governed according to provisions of the State Education Code and other State of California Codes governing special districts. PVLD is in Los Angeles County, California, and serves the four cities of Rancho Palos Verdes, Rolling Hills Estates, Rolling Hills, and Palos Verdes Estates, as well as two small, unincorporated areas of Los Angeles County, totaling a 28 square-mile area.

The PVLD has four locations:

- Peninsula Center Library
- Malaga Cove Library
- Miraleste Library
- Annex

Currently, the Library is using the Millennium ILS from Innovative Interfaces plus a custom OPAC built using Drupal open source software.

## GENERAL INFORMATION

This Request for Proposal (RFP) is issued by the Palos Verdes Library District (henceforth referred to as “Library”) for the purpose of obtaining proposals for a vendor-hosted web-based Integrated Library System (ILS).

This section includes some general information about the PVLD collection, staff size and other details. Please use this information when you determine hardware configuration and system pricing.

Number of locations (total number of branches)	4
Circulation	600,000 per year
Digital Circulation	130,000 per year
Number of bibliographic records	220,632
Number of item records	256,181
Number of authority records	259,105
Number of patron records	57,000

Total number of staff users	50 simultaneous users
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## RFP CONTACT INFORMATION

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## TERMS & CONDITIONS

- A. PVLD is not liable for any cost incurred by proposers prior to issuance of a contract. PVLD reserves the right to accept all or part of any proposal or to cancel in part or in its entirety this Request for Proposal (hereafter referred to as "RFP"). PVLD further reserves the right to accept the proposal that it considers to be in the best interest of PVLD.
- B. Proposals must be valid for 90 days.
- C. PVLD reserves the right to expand or diminish the scope of work subject to negotiation with the successful firm.
- D. In the event it becomes necessary to revise any part of the RFP prior to the bidder's response, an addendum will be provided in writing to all receiving the RFP from PVLD.

## TIMELINE

The timeline supplied is the Library's best estimate and does not represent a binding agreement on behalf of the library district. The actual implementation date will be arrived at by mutual agreement, as soon as possible, between the Library and the selected Vendor.

Activity	Date
RFP Released	September 12, 2018
Proposals Due	October 19, 2018
Meetings with Top Vendors	November & December
Final Selection of Vendor	January
Contract Negotiations	January
Signed Contract	February
Project Start	February
Desired Completion	June 30, 2019

**Proposals are due by 5:00 pm PDT October 19, 2018.** Late responses will not be considered.

## ILS Connected Services

The Library currently utilizes the following third party vendors and expects that the products offered by these vendors can be seamlessly integrated into the ILS functionality:

Computer Reservations and Patron Printing	Envisionware PC Reservation, LPT:One, and eCommerce
Self Checkout Machines	Envisionware X11 with OneStop
Study Room Reservations	D!bs from Demco
Online Proxy Service	EZProxy
Databases	EBSCO, Proquest, Hoopla, Freegal using Patron API or SIP2
Interlibrary Loan	Tipasa
Acquisition Vendors	Brodart
Materials & Records	OCLC Cataloging Services & Marchive
Receipt printers	Epson Thermal Receipt Printers with Windows Drivers

## COST PROPOSAL

Cost quotes and payment terms should be included for all software and recommended equipment. Pricing should reflect a vendor-hosted solution for the system.

- Please use the pricing sheet included in this section to indicate the costs for the various components.
- Please feel free to add items to the cost table if you have items which do not fit into the specific categories.
- Prices for the initial purchase, implementation and 5 years of maintenance should be included for each item.

ILS COST PROPOSAL						
Description	Initial/ Implementation	Year 1	Year 2	Year 3	Year 4	Year 5
<b>Required Modules</b> <ul style="list-style-type: none"> <li>• Circulation</li> <li>• Acquisitions</li> <li>• Serials</li> <li>• OPAC/Discovery</li> <li>• Cataloging</li> <li>• Reports (including Admin/Statistics)</li> <li>• Inventory &amp; Authority Control</li> </ul>						
Hosting						
Training						
Data Migration						

ILS COST PROPOSAL						
Optional Modules	Initial/ Implementation	Year 1	Year 2	Year 3	Year 4	Year 5

iOS & Android App						
Marketing Module						
CRM Module						
Interlibrary Loan Module						
<i>Include any other optional items described in your Proposal</i>						

## OPAC

<b>OPAC Functionality</b>	
Intuitive functionality for patrons	Required
Ability for patrons and staff to create and share lists	Required
Search includes keyword, browsing and advanced searching	Required
Display enhanced content: cover art, reviews, read-a-likes, etc.	Required
Limit searches by Lexile and Accelerated Reader	Required
Display Lexile and Accelerated Reader data on bibliographic records	Required
Integration with OverDrive, including real-time updates of inventory	Required
Integrated, intuitive online fine payment solution or ability to integrate with third party vendor	Required
Clear location & availability on results screen	Required
Customization of heading and other wording throughout the catalog	Required
Ability to design & display customized library material carousels	Required
History of checked out items capability in "My Account" including digital usage	Required
Ability to readily display new materials	Required
Smart searching, including "Did you mean?"	Required
Responsive mobile website design	Required

Ability to search and filter by level of material, relevance, availability, format, location	Required
Website accessibility compliance	Required
Integrates with Google Analytics or equivalent	Required
Ability of patron to manage notifications methods	Required
Discovery layer handles spell checking, dynamic predictive search results, and keyword or related search suggestions	Required
Ability for patron to update approved contact information fields for their account and, optionally, for linked family member accounts	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. Japanese, Korean, Chinese)	Optional
Show custom messages for each patron within their account	Optional
Submit suggestions for purchase	Optional
Integration of location mapping to indicate the location of an item within the Library	Optional
Ability for linked family accounts to renew items	Optional
Integration with RAZ-Kids	Optional

## CIRCULATION

<b>Circulation Functionality</b>	
Patron can update information & manage own account including renewals, payment, cancel/freeze holds without staff intervention, download reading history	Required
Patron can self-register for a library account	Required
Patron record includes field for option to receive publicity from 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
Registration process provides alert for duplicate customer record based on defined fields	Optional
Ability to link membership of people in same family	Optional
<b>Financial Management</b>	
Ability to pay full and/or partial replacement cost of materials	Required
Option for waiving & refunding	Required
Option for Patron type to determine fines and fees	Required
Option for Item type to determine fines and fees	Required
Collection account integrated with library software	Required
Ability to see fine history in the patron account	Required
<b>Holds &amp; Notifications</b>	
Notification for holds, overdues, courtesy notices including telephone, email and text messaging	Required
Ability of patron & staff to cancel holds	Required
Ability of patron & staff to suspend or freeze holds	Required
Records kept for notices sent	Optional
<b>Circulation &amp; Management</b>	
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, age, branch location	Required
Support floating collections	Required
Mobile circulation inside building & outside library without need for offline circulation	Required
Offline circulation	Required
Customized receipt ability	Required
Ability to provide receipts via multiple options, including email, print & text messaging	Required
Ability to customize wording and graphics for messages & notices	Required
Same record can be in use at multiple workstations	Required

Complete integration with RFID self-service functionality, including checkout, renewals, holds management and fines payment at self-checkout stations	Optional
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

<b>Reports</b>	
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 with an option to email or FTP results	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

## CATALOGING

<b>Cataloging</b>	
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
Integration with Bibframe	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
Ability to upgrade records to be discoverable on the internet	Required
Ability to integrate digital content from local library	Required
Spellcheck capability	Optional

## SERIALS

<b>Serials</b>	
Ability to automatically send claimed missing issues to vendor, as per configured parameters, with no staff intervention	Required
Report of missing issues automatically generated	Required
Ability to utilize frequency information from vendor to automatically create check in boxes and customize dates	Required
Ability to create routing information	Optional
Serials invoicing occurs automatically, with no staff intervention, and automatically connects into accounting software	Optional

## ACQUISITIONS

<b>Acquisitions</b>	
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Ability to utilize EDI ordering	Required
Ability to create order records from imported vendor carts	Required
Claiming capability	Required
Detailed fund reports for collection areas	Required
Automated status changes from Ordered/Receive/Invoiced without staff intervention	Optional
Invoices are integrated into accounting software, with no staff intervention	Optional

## SYSTEM, SERVER & SOFTWARE FUNCTIONALITY

Functionality	
Ability to add and integrate APIs (provide an overview of available APIs)	Required
Ability to distinctly brand and customize options for staff and public interfaces	Required
Ability to access the ILS from 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
Availability/usage of SIP2 connections	Required
Granular security that can be applied to each user account	Required
Customer information and backups remain in the United States	Required
Ability to customize the staff interface	Required
Ability to customize the public interface	Required
Security measures are included to minimize chance of fraudulent activity or access	Required

## MIGRATION, SUPPORT & TRAINING

<b>Migration, Support &amp; Training</b>	
Complete migration of patron, bibliographic and item data from Millennium ILS ( Innovative Interfaces)	Required
Documentation is provided in one place and is keyword accessible	Required
Data migrated in a secure fashion, using industry standard encryption	Required
Regular updates on open tickets are provided to ticket creator	Required
Escalation process is provided for unresolved issues	Required
System allows staff to change their own password, password recovery by email	Required
Phone support during library open hours	Required
On-site training is provided for all functionality, including system administration and configuration	Required
24/7 Phone Support	Optional
On-going separate test environment is provided to try and test settings and configuration, as well as training	Optional

## EVALUATION AND SELECTION PROCESS

### PROPOSAL EVALUATION

A team of library department managers will score the the proposals. Scores and comments will be gathered and the team will make recommendations for the top vendors for approval.

The following criteria will be used to evaluate each proposal:

	Proposal	Product Demo	Total Possible Points	Percentage of Total
<b>User Experience</b>	25	45	70	35%
<b>Staff &amp; Technical Functionality</b>	25	45	70	35%
<b>Compatibility with Connected Services</b>	10	10	20	10%
<b>Implementation/Migration Plan</b>	10	-	10	5%
<b>Support &amp; Training</b>	10	-	10	5%
<b>References</b>	10	-	10	5%
<b>Cost</b>	10	-	10	5%
<b>Total</b>	100	100	200	100%

#### VENDOR MEETINGS & DEMONSTRATIONS

The top vendor candidates will be asked to take part in on site demonstrations.

#### FINAL DECISION

Following the vendor meetings and demonstrations, the department managers will develop a final recommendation for approval. Following the approval by the district director, the recommendation will be sent to the Board of Trustees for final approval.

## DELIVERABLES

To be eligible for consideration, all proposal-related materials must be received by

**October 19, 2018 5:00 PM PST**

**Electronic submissions in PDF format are preferred.**

All correspondence will be confirmed by email.

For each question, use the following guidelines to respond:

- Focused, clear, concise answers

- Describe how your system is unique if applicable
- Clarify what exists now and what is in development
- If in development, please provide estimated release date

To be considered complete, proposals must include the following:

Confirmation of compatibility with all items under the “ILS Connected Services” heading

A complete Cost Proposal

Responses to items in the “OPAC” heading

Responses to items in the “Circulation” heading

Responses to items in the “Reports” heading

Responses to items in the “Cataloging” heading

Responses to items in the “Serials” heading

Responses to items in the “Acquisitions” heading

Responses to items in the “System, Server and Software Functionality” heading

Responses to items in the “Migration, Support & Training” heading

References - Please provide 3-5 references that accurately reflect the system performance and company support. References should include similar installations in the areas of number of libraries, population size, collection size, and transaction levels

## CONTACT & QUESTIONS

Please direct all correspondence to:

David Campbell

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