Pacific Library Partnership

March 2016

Requested for Quotation

Silicon Valley Library System Unified ILS Platform Study

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Introduction

The Pacific Library Partnership (PLP) is a consolidation of four library systems, BALIS (Bay Area Library and Information System), serving Alameda, Contra Costa, and San Francisco Counties; PLS (Peninsula Library System), serving San Mateo County; MOBAC (Monterey Bay Area Cooperative Library System), serving Monterey, Santa Cruz, and San Benito Counties; and SVLS (Silicon Valley Library System), serving Santa Clara County.

The Pacific Library Partnership, located at 2471 Flores Street, San Mateo, California, seeks assistance in researching the possibility for all SVLS member libraries to share a unified ILS platform. The study will demonstrate the benefits and/or drawbacks for a shared ILS and possible cost savings in hardware, software, and staffing/support. It will also include the evaluation of the major public library ILS applications such as but not limited to Sierra, Evergreen, SirsiDynix, Horizon, Symphony, and Apollo as the possible shared ILS platform for SVLS.

Scope of Work

An IT and Executive point of contact is to be established with each SVLS member. Please see table at end of document regarding Library ILS's.

1. Los Gatos Public Library
2. Mountain View Public Library
3. Palo Alto City Library
4. San Jose Public Library
5. Santa Clara City Library
6. Santa Clara County Library District
7. Sunnyvale Public Library

Gather and compare data

Consultant is to gather and compare ILS data to determine required changes for a shared ILS platform. Consultant will also gather information regarding the hardware, software and number and responsibilities of staff supporting the ILS to determine if cost savings is possible with a shared ILS.

Current ILS configuration considerations

1. Patron and card type scheme: Will it work together or will it need to be modified?
2. MARC records information
   a. Are call numbers in the bibliographic record? Will they need to be moved to the item record to avoid sharing call numbers? Will there be a cost associated?
3. De-duplicating (merging) patron files
   a. Do the libraries all use the same ID number (e.g. California driver's license) to identify their patrons?
   b. Do patrons have multiple barcodes for cards?
4. De-duplicating (merging) bibliographic records

5. De-duplicating (merging) authority records
6. Item barcodes: Are the item barcodes compatible with each other? Does each jurisdiction have numbers different from the other jurisdictions in SVLS?
7. Loan rules: Will there be a standardized loan rule that all members abide by? Or will each member have a unique set that may or may not align with the other jurisdictions?
8. How would we go about merging or organizing existing loan rule tables?
9. Location codes: Are there location codes in place and do they need to be modified? Or can they be combined as they are today?
10. Discovery Layer: What is used today? Do they want to keep the Discovery Layer of the ILS or look at a third party solution?
11. Collection Table: What are the policies?
12. Notices: What are the processes in place and why types of notices are provided?
13. ILS Modules such as Floating Collections, phone and/or text renewal, ecommerce, and acquisitions
14. Which Jurisdictions are currently sharing materials?
    a. Via what method
    b. Number of materials shared amongst jurisdictions
15. How will a unified ILS impact third party systems?
    a. RFID
        i. Tags compatibility
        ii. RFID Tags vs. Barcodes (are locations set in hybrid mode?)
    b. Discovery Layer
    c. PC Time Management
    d. EZ Proxy

Staff

Gather information regarding all staff supporting the ILS system for each SVLS member library.

1. Number of employees
2. Hours per week
3. Responsibilities for ILS

ILS evaluation

Evaluate the major public library ILS applications on the market that will provide all the needs for a shared ILS platform. Provide the best recommended system design for SVLS

1. Single server (all SVLS members share the ILS application via a single server)
2. Cluster (for load balancing)
3. Linked servers (everyone has their own individual server and the servers can communicate with one another)

Recommendation

Provide a detailed report with the findings and recommendations for a unified platform for SVLS which will include but is not limited to ILS, system design, hardware, software and staff to support the unified ILS platform.

Instructions to submit a quote

Consultant must submit an electronic copy to Monica Schultz, IT Director, schultz@plsinfo.org .

Please provide timeline for research and preparation of report.

Responses are due by 1:00pm Friday, March 25, 2016. Late submittals may be rejected by PLP.

PLP reserves the right to accept or reject any or all responses, or accept or reject any part of a response deemed to ensure that the best interests of SVLS are met.

Responder may not contact SVLS member libraries during the response for quote, all inquiries should be directed to:

Monica Schultz, IT Director
schultz@plsinfo.org
650- 571-6799

Schedule

Shown below are the dates and times by which actions related to this Request for Quotation must be completed. In the event that the Pacific Library Partnership finds it necessary to change any of these, it will do so by issuing an Addendum to this Request for Quotation.

Schedule	
Release Request for Quotation	Monday, March 7, 2016
Last Day to Submit Question	Thursday, March 17, 2016
Responses Due	**Friday, March 25, 2016 1:00pm**
Responder Selection	Monday, April 4, 2016
Contract Award	Wednesday, April 6, 2016

Notes:

Currently all SVLS member libraries run their own Sierra ILS server with the exception of Los Gatos Library that is running Koha.

Library	ILS	Discovery Layer	Length of time on ILS	Any plan to migrate
Los Gatos	Koha	Koha	5 yrs.	No
Mountain View	Sierra	encore	19 yrs. with III, 2 yrs. on Sierra	No
Palo Alto	Sierra	encore	moved from Horizon to Sierra Feb 2016	No
San Jose Public Library	Sierra	encore	III since 2003, Sierra since 2013	No
Santa Clara City Library	Sierra	encore		No
Santa Clara County Library	Sierra	Bibliocommons	7 months	TBD
Sunnyvale Public	Sierra	encore	Migrated to Sierra April 22, 2015	No