



The Library Network

Libraries Working Together

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The Library Network

Request for Proposal For A Cataloging Utility

September 2017

Proposals due September 29, 2017 4:30 p.m. EDT

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A. General Information

A.1 Background

The Library Network (tln.lib.mi.us) is the largest library cooperative in the State of Michigan, serving residents throughout Wayne, Washtenaw, Oakland, Livingston, and St. Clair Counties. TLN's 75 member libraries serve a population of 2.4 million—one-quarter of Michigan's population.

The Library Network strives to provide and facilitate quality library services to its member libraries, thereby improving library services to their communities. From its headquarters in Novi, Michigan, TLN provides a full range of services and products from which member libraries can choose, including an integrated library system.

TLN has operated an integrated library system since 1982 that currently serves 50 independent public libraries operating 53 service locations. The system has approximately one million bibliographic records with five million copies attached, and a combined annual print and electronic circulation of about 8.5 million. The Shared Automation System (SAS) is funded by the participating libraries, with governance organized via the SAS Executive Committee and the SAS Users Group. The Library Network Board is the ultimate governing authority.

TLN has operated the SirsiDynix Symphony system since 2004. Cataloging for the system is provided centrally by TLN; SAS libraries attach their holdings records to the centrally created bibliographic records. SAS library staff currently use a search-only login to search the SkyRiver client for bibliographic records not found in Symphony. Library staff mark and email records to TLN central cataloging for records to be edited and loaded into Symphony.

TLN cataloging staff use the SkyRiver client for copy and original cataloging of MARC records to be loaded into Symphony. Individual record searches and batch searches are used regularly as well as authority control.

A.2 Overall intent and Purpose

The Library Network is seeking proposals for a cataloging utility, including searching and emailing functionality for the 50 libraries using the Shared Automation System.

A.3 Minimum Requirements

Minimum 80% hit rate, adherence to standards including RDA compliance, ability to search MARC records individually and in batch, must include authority control, ability to create copy and original MARC records and ability to import and export MARC records. A fully functional cataloging tool is needed by cataloging staff at The Library Network with a search-only component available to shared system libraries. Staff at shared system libraries require a method by which to communicate to TLN cataloging staff bibliographic records in the cataloging utility that need to be loaded into our local system.

A.4 Project Schedule

The Library Network anticipates the following key project dates:

- RFP released September 1, 2017
- Proposals due at TLN September 29, 2017
- Opening of proposals October 2, 2017
- Contract signed January 7, 2018
- Begin using utility February 1, 2018

A.5 Official Contact

The official contact for this Request for Proposal:

Janna VanHouten
The Library Network
41365 Vincenti Ct.
Novi MI 48375
(248)536-3100 ext. 138 (voice)
(810)512-7763 (fax)

jvanhouten@tln.lib.mi.us (e-mail)

In order to maintain a fair and impartial selection process, contact with other TLN staff or staff at member libraries about this RFP is prohibited. Failure to abide by this policy may result in disqualification of proposal. Suspected errors in the solicitation should be immediately reported in writing to the official contact.

A.6 Procedure for Submission of Proposals

Submit two print copies and one electronic (PDF) copy of your proposal. All proposals must be enclosed in a sealed envelope or appropriate packaging, with "Proposal" clearly marked on the outside. Mailed or hand-delivered proposals should be addressed and delivered to:

The Library Network
Attn: Janna VanHouten
41365 Vincenti Ct.
Novi MI 48375

An electronic (PDF) copy of your proposal should be sent as an email attachment to:

jvanhouten@tln.lib.mi.us

Any proposal received after the hour and date specified (4:30 p.m. on September 29, 2017) will not be considered. Any modification of a proposal received after the closing date and time of the RFP will likewise not be considered. Bidder is solely

responsible for the delivery and drop-off of its proposal to the correct location during business hours before the date and hour set for the opening of proposals.

A.7 Evaluation Criteria

Written proposals will be evaluated by TLN staff. Evaluation criteria are as follows: corporate history, prior experience, cost, implementation and training, staff functionality, public interface, technical requirements, size of database, quality control and vendor cataloging services.

B. Overall Intent and Outcomes Desired

As provider of central cataloging services for the 50 public libraries using The Library Network's shared automation system, TLN considers it a matter of due diligence to periodically review services offered. We wish to contract with a single vendor for a cataloging utility that is easy to use and simple for new staff to learn, and for searches that yield high percentages of quality bibliographic records.

Please tell us how your products will meet our needs and exceed our expectations.

Please provide 3 references of customers similar in size and complexity.

C. Corporate Background

Please provide a brief history of your company and the corporate vision for its future.

What makes your company unique?

What new cataloging developments are you most excited about? Can you tell us about any innovative products that are just released, soon to be released, or in development? Where are you concentrating your development efforts?

D. Features

As a large consortium of independent libraries, some with branches, The Library Network requires the following features.

Please describe how your system configuration options can meet these needs.

D.1 Database

Describe your database including size, structure and features. How many full unique records does it contain?

D.2 Functionality

Does your utility allow for searching records individually and in batch, creating copy and original MARC records, importing and exporting MARC records individually and in batch? Are macros and constant data available? Is it possible to validate records and perform authority control?

D.3 Quality control

The bibliographic database is the heart of the shared system and every effort is made to keep it as clean as possible. The Library Network provides centralized cataloging for the shared system libraries. Local library staff cannot create or modify MARC records although they can add brief records for new items not in the database. Holdings are added to existing MARC records locally and a library can only modify or delete its own item information. SkyRiver is the cataloging utility currently used and records are also received from the major book and AV vendors. All records are edited before they are loaded into the database. The database is RDA compliant and authority records are received from our current automation vendor weekly.

Please explain how your cataloging utility will enable us to maintain a clean RDA compliant database. How is your company approaching the new BIBFRAME standard?

Please briefly share specific cataloging and authority control features not covered here that you believe will be of special interest to TLN and/or separate you from other cataloging utilities. Your response should be no more than one page.

D.4 Customer support

Describe your customer support approach including staffing, hours, level of expertise, resolution time.

E. Setup and Training

E.1 Setup

Describe what is involved in initial setup. What is needed to resume productivity?

E.2 Training

Many shared system libraries rely heavily on part time staff that may work at more than one library and may be transient. Training new staff on existing systems and training existing staff on new systems are equally challenging.

Describe in detail your initial and ongoing training.

How can your company help us overcome these training challenges? Do you have written documentation that can be tailored for our specific needs? "Cheat sheets?" Do you have materials to support training on an ongoing basis?

What training options are available for central site staff?

F. Technical Requirements

A fully functional cataloging tool is needed by cataloging staff at The Library Network with a search-only component available to shared system libraries. Staff at shared system libraries require a method by which to communicate to TLN cataloging staff bibliographic records in the cataloging utility that need to be loaded into our local system. TLN has used cataloging clients to date, but would also consider a Web-based access option, Z39.50 access or a combination of these.

Please describe what options are available with your system. Is the option for a locally installed client and Web-based product available? What is your recommended solution?

Please provide recommended hardware configuration for a locally hosted client.

Please provide recommended bandwidth and internet browser requirements for a Web-based tool.

F.1 Reliability

The shared system libraries expect cataloging services to be available 100% of the time during scheduled library hours, so reliability is very important.

Describe how you will partner with us to provide system reliability. What is your average downtime percentage? How do you mitigate data loss and other risks? What service levels are available and what is your average response time for resolving critical issues? How much scheduled downtime does the system require daily? Can software upgrades be scheduled outside normal library hours? Is there an extra charge? Does reliability vary between client, web-based and Z39.50 access?

F.2 Adherence to Standards

Please outline what Industry standard organizations (NISO, ANSI, etc...) your organization actively participates in/contributes to.

Please provide a list of all standards your system adheres to.

F.3 Third Party Vendors

Are MARC records or MARC record loads available from vendors that our libraries order materials from? If so, is there a cost associated with this feature?

G. Cost

The prices discussed in this proposal will be the set prices for contract negotiations. The Library Network is interested in pricing for a 3 year term, beginning February 1, 2018 and ending January 31, 2021.

G.1 Cost Formula

A fully functional cataloging tool is needed by cataloging staff at The Library Network with a search-only component available to shared system libraries. Staff at shared system libraries require a method by which to communicate to TLN cataloging staff bibliographic records in the cataloging utility that need to be loaded into our local system.

Describe your cost formula related to searches, downloads and records contributed to the database.

G.2 Software Cost

Please indicate the cost for any software needed.

G.3 Training

Please indicate suggested training and related cost.

H. Terms and Conditions

The following Terms and Conditions are in addition to those that will be contained in the signed contract. To the extent there are any conflicts between this RFP and the signed contract, the Terms and Conditions in the signed contract will prevail.

All responses, inquiries, and correspondence relating to this RFP and all reports, charts, displays, schedules, exhibits, and other documentation produced by the proposal process that are submitted to TLN as part of the proposal or otherwise shall become the property of TLN and may be considered public information under applicable law.

H.1 Effective Term of Proposal

Unless a proposal is expressly rejected by TLN, all proposals will remain in effect for 210 days subsequent to the proposal opening. TLN may request that bidders extend the effective period of their proposals. Such requests shall be in writing and will require bidder's written consent to the extension.

Bidder may not withdraw, cancel, or modify its proposal for a period of 210 days after the advertised closing time for the receipt of proposals.

H.2 Award and Negotiations

This Request for Proposal does not obligate TLN to accept or contract for any expressed or implied services. Likewise, TLN is not obligated to award a contract pursuant to this RFP.

TLN reserves the right to enter into discussions with the bidders whose proposals are deemed most advantageous for the purpose of negotiation. If more than one proposal is found to be satisfactory, TLN

reserves the right to negotiate simultaneously with more than one bidder. TLN also reserves the right to stay with its current cataloging utility provider if it determines that it is the best interest of the participating libraries.

If applicable, TLN will post a notice to its website recommending a preferred bidder. The notice extends the effective term of the bidder's proposal until the parties sign a contract or determine not to sign a contract.

H.3 Rejection of Proposal and Waiver of Informalities

TLN, in its sole discretion and authority, may determine that it is in the best interest of TLN to reject any or all proposals submitted in response to this RFP. TLN, in its sole discretion and authority, may disregard or waive any informality in the proposals or bidding process.

H.4 Reservations

Bidder must read and understand the solicitation and tailor the proposal and all activities to ensure compliance. TLN reserves the right to amend the solicitation; reject any or all of the proposals; and waive minor defects. TLN may request a clarification, inspect bidder's premises, interview staff, request a presentation, or otherwise verify the contents of the proposal, including information about subcontractors and suppliers. TLN may request best and final offers where appropriate. TLN will make all decisions on compliance, evaluation, terms and conditions, and shall make decisions in the best interests of TLN. Failure of a bidder to comply with requests for information or cooperate may result in the proposal being deemed non-responsive to the solicitation. Submitting a proposal does not entitle a bidder to an award or contract. TLN is not responsible for and will not pay any costs associated with the preparation and submission of any proposal. Awarded bidder shall not commence, and will not be paid for, any billable work prior to the date all parties execute the contract.

H.5 Incorporating Costs

Bid prices must incorporate any/all peripheral costs including, but not limited to the costs of products/services, delivery/transportation charges, training materials, labor, insurance, applicable taxes, warranty, overhead and profit, etc. that are required by the RFP.

H.6 Taxes

Bidder shall assume and pay all taxes, including state, federal, and local taxes, which are payable by virtue of the furnishing and delivery of materials or services specified. Materials and services purchased by TLN are not subject to either federal excise taxes or Michigan sales taxes. Bidders shall include all other applicable federal, state, and local taxes, direct or indirect, in their proposals.

H.7 Withdrawal of Proposal

Bidders may withdraw their proposal at any time prior to the date and time for proposal opening. Requests for withdrawal must be made in writing on the bidder's letterhead to the official contact for the RFP.

H.8 Responsibility

A bidder is considered responsible when it has the capability in all respects to fully perform the contract requirements and has the integrity and reliability that will assure good faith performance. TLN will determine whether TLN can or should do business with a bidder. TLN may consider factors including, but not limited to certifications, conflict of interest, financial disclosures, past performance, references (including those found outside the solicitation), compliance with applicable laws, financial responsibility, insurability, equal opportunity compliance, capacity to produce, ability to provide required maintenance services or other matters relating to the bidder's

probable ability to deliver the required services within the time and price as specified in this RFP.

H.9 Governing Law

Michigan law and rule govern this RFP and any resulting contract. Bidder must bring any action relating to this RFP or any resulting contract in the appropriate courts in Michigan.

H.10 Public Records and Requests for Confidentiality

All responses, inquiries, and correspondence relating to this RFP and all reports, charts, displays, schedules, exhibits, and other documentation produced by the proposal process that are submitted to TLN as part of the proposal or otherwise shall become the property of TLN and may be considered public information under applicable laws. However, TLN will consider requests for confidential treatment under Michigan Freedom of Information ACT (FOIA) (MCL 15.231). A request for confidential treatment will not supersede TLN's legal obligations under FOIA. TLN will not honor requests to keep entire responses confidential. Bidders must show the specific grounds in FOIA or other law or rule that support application of confidential treatment. Regardless, TLN will disclose the successful bidder's name, the substance of the response, and the price. If bidder requests confidential treatment, bidder must submit an additional copy of the response with the proposed confidential information redacted. This redacted copy must tell the general nature of the material removed and shall retain as much of the original response as possible. Bidder shall list the provisions, identified by section number, for which it seeks confidential treatment and identify the statutory basis under Michigan or other applicable law and include a detailed justification for exempting the information from public disclosure. Bidder will hold harmless and indemnify TLN for all costs or damages associated with TLN honoring bidder's request for confidential treatment. Bidder agrees that TLN may copy the response to facilitate evaluation, or to

respond to requests for public records. Bidder warrants that such copying will not violate the rights of any third party.

H.11 Bid Protests

The bidder shall submit any protests or claims regarding this RFP to:

Janna VanHouten
The Library Network
41365 Vincenti Ct.
Novi MI 48375

A pre-bid protest must be filed no later than five calendar days before the proposal opening date, a pre-award protest must be filed no later than ten calendar days after the proposal opening date, and a post-award protest must be filed no later than ten calendar days after the award of the contract. Awards are not final until all protests are resolved.

All protests or claims must set forth the name and address of the protester, the specification number, the grounds for the protest or claim, and the course of action that the protesting party desires.

A copy of this RFP is available at:

http://tln.lib.mi.us/rfp/files/TLN_BIBUTILITY_RFP_2017.pdf

Appendix

Shared Automation System Participating Libraries

[Addison Township Public Library](#)

[Allen Park Public Library](#)

[Auburn Hills Public Library](#)

[Belleville Area District Library](#)

[Berkley Public Library](#)

[Brighton District Library](#)

[Chelsea District Library](#)

[Clawson Blair Memorial Library](#)

[Commerce Township Community Library](#)

[Dearborn Heights - Caroline Kennedy Library](#)

[Dearborn Heights - John F. Kennedy, Jr. Library](#)

[Dexter District Library](#)

[Ecorse Public Library](#)

[Ferndale Public Library](#)

[Flat Rock Public Library](#)

[Franklin Public Library](#)

[Garden City Public Library](#)

[Hamtramck Public Library](#)

[Hartland Cromaine Library](#)

[Hazel Park Public Library](#)

[Highland Township Public Library](#)

[Huntington Woods Public Library](#)

[Inkster Leanna Hicks Public Library](#)

[Lincoln Park Public Library](#)

[Livonia Civic Center Library](#)

[Livonia Alfred Noble Library](#)

[Livonia Carl Sandburg Library](#)

[Lyon Township Public Library](#)

[Madison Heights Public Library](#)

[Manchester District Library](#)

[Melvindale Public Library](#)

[Milford Public Library](#)

[Northville District Library](#)

[Novi Public Library](#)

[Oak Park Public Library](#)

[Oxford Public Library](#)

[Pontiac Public Library](#)

[Redford District Library](#)

[River Rouge Public Library](#)

[Riverview Public Library](#)

[Romulus Public Library](#)

[Royal Oak Public Library](#)

[Salem-South Lyon District Library](#)

[Southgate Veterans Memorial Library](#)

[Springfield Township Library](#)

[Taylor Community Library](#)

[Trenton Veterans Memorial Library](#)

[Walled Lake Library](#)

[Waterford Township Public Library](#)

[Wayne Public Library](#)

[White Lake Township Library](#)

[Wixom Public Library](#)

[Wyandotte Bacon Memorial District Library](#)