RFP SJVLS 21-001 Library Management System
Addendum 2, Responses to Requests for Clarification
November 3, 2020

Question 1 (received via email)

Due to COVID-19 most employees are working remotely. Where required, would digital signatures (via docusign) be acceptable?

> **Answer 1:** SJVLS recognizes that the COVID-19 pandemic and the transition to remote work makes it difficult to gather physical signatures. We will accept digital signatures, where signatures are required.

Question 2 (received via email)

Please describe libraries processes for collection management that do not use Unique Mgmt.

> **Answer 2:** The SJVLS members that do not use Unique Management for their patrons sent to collections, use services through their County or City to manage accounts. Staff at each of the 4 jurisdictions receive new submit and update reports for borrowers in collections. The new submits identify borrowers that meet the criteria for being submitted to collections. Staff then use the information in the report to add the borrowers to the County's or City's system. The update reports provide staff with information about new fees or recent payments made borrowers in collections. Staff then use the information in the report to update patron account balances with their County or City. Staff also receive payment reports from the County or City service, and they use those reports to update patron accounts within the LMS.

Question 3 (received via email)

Could you further describe your processes for floating materials? SJVLS uses a "table/view" to figure out capacity and then use that to float items. We would like to know more about the process, how you create, populate, and use that table.

> **Answer 3:** For floating materials, SJVLS's preference is to have an item's location automatically update to the location where it was returned, if the check in location is a location within the jurisdiction that owns the item. If the item is from a jurisdiction outside of the check in location, we want the item to go in transit back to the owning location without changing the item's location. The tables below illustrate this process:

Item Returned to Location Inside Owning Jurisdiction			
Original Item Location	**CKO Location**	**CKI Location**	**Desired Result**
Woodward Park (Fresno Co.)	Auberry (Fresno Co.)	Auberry (Fresno Co.)	Item location updated to Auberry (Fresno Co.)
Hanford (Kings Co.)	Hanford (Kings Co.)	Lemoore (Kings Co.)	Item location updated to Lemoore (Kings Co.)
Chowchilla (Madera Co.)	Woodward Park (Fresno Co.)	Chowchilla (Madera Co.)	Item location remains Chowchilla (Madera Co.)
Visalia (Tulare Co.)	Three Rivers (Tulare Co.)	Dinuba (Tulare Co.)	Item location updated to Dinuba (Tulare Co.)

Item Returned to Location Outside Owning Jurisdiction			
Original Item Location	**CKO Location**	**CKI Location**	**Desired Result**
Woodward Park (Fresno Co.)	Madera Ranchos (Madera Co.)	Madera Ranchos (Madera Co.)	Item location remains Woodward Park. Item put in transit back to Woodward Park.
Hanford (Kings Co)	Hanford (Kings Co)	Laton (Fresno Co.)	Item location remains Hanford. Item put in transit back to Hanford.
Visalia (Tulare Co)	Visalia (Tulare Co)	Tulare Public Library	Item location remains Visalia. Item put in transit back to Visalia.

The capacity table/view is a tool for staff to use to re-distribute items in situations where a location has more items for a collection than the branch has shelving space, or alternatively, when a branch does not have enough items from a collection. The capacity table has columns for location, collection code, capacity, and stock. Capacity is a value that represents the theoretical max number of items a location can fit on their shelves for a collection code. The stock column is a count of the number of items at a location and collection code that are checked in. When a location reports having too many, or not enough items for a collection, a staff member in charge of managing floating collections can use the table to find locations with excess stock, or locations that have room to shelve more items. They then coordinate with the two locations to transfer items between them to balance capacity.

Question 4 (received via email)

Can you please confirm the physical number of SJVLS administration offices?

> **Answer 4:** SJVLS has one administration office, located inside the Fresno Central Library. The address is 2420 Mariposa St. Fresno, CA 93720.

Question 5 (received via email)

On page 26, the RFP states that there are "500 concurrent staff users at peak load (749 user accounts)". Does this mean that there are 500 staff workstations that will need connection to the ILS? Can you please clarify?

> **Answer 5:** In operation, the maximum number of staff users simultaneously connected to the ILS would be 500. This would occur when all libraries are open, and all staff are working. There are potentially more than 500 workstations that would need a connection to the ILS. However, they will not all be connected at the same time. This number includes circulation workstations, as well as individual staff workstations.

Question 6 (received via email)

On page 27, the RFP states that there are 48 locations with various brands of Self-check. Can you confirm the total number of Self-checks.

> **Answer 6:** There are 105 self-check stations at SJVLS libraries for use by patrons. Below is a breakdown of the number of self-check stations installed at each location. The list is organized by jurisdiction, then branch name and the number of self-checks.

- **Coalinga-Huron - 0**
  - No self-check stations at any of their locations.
- **Fresno County - 49**
  - Auberry – 2
  - Bear Mountain – 1
  - Betty Rodriguez – 3
  - Caruthers – 2
  - Clovis – 4
  - Fig Garden - 3
  - Fresno Central Library – 2
  - Fowler – 2
  - Gillis – 3
  - Kerman – 2
  - Kingsburg – 2
  - Mendota – 2
  - Orange Cove – 2
  - Politi – 2
  - Reedley – 2
  - Sanger – 2
  - Selma – 3
  - Sunnyside – 4
  - Tranquility – 1
  - Woodward Park – 3
  - West Fresno – 2
- **Kern County – 32**
  - Arvin – 2
  - Beale - 4
  - California City - 2
  - Delano -
  - Frazier – 1
  - Kern River Velley- 1
  - Lamont- 2
  - McFarland- 2
  - Northeast – 1
  - Rathbun- 1
  - Ridgecrest- 2
  - Rosamond – 1
  - Shafter- 2
  - Southwest- 3
  - Taft – 2
  - Tehachapi - 1
  - Wasco - 2
  - Wilson – 2
- **Kings County – 2**
  - Hanford – 2
- **Madera County – 0**
  - No self-check stations at any of their locations.

- **Mariposa County – 0**
  - No self-check stations at any of their locations.
- **Merced County – 0**
  - No self-check stations at any of their locations.
- **Porterville – 1**
  - Porterville City Library – 1
- **Tulare County – 19***
  - **NOTE** – Tulare County is in the process of RFIDing their entire collection at all locations. As of 11/2/2020 they have 2 self-check stations installed, one at Visalia and one at Dinuba. After the RFID project is completed, there will be one self-check station at all of their locations, with the exception of Visalia, which will have 2.
  - Alpaugh – 1
  - Dinuba – 1
  - Earlimart – 1
  - Exeter – 1
  - Farmersville – 1
  - Ivanhoe – 1
  - Lindsay – 1
  - London – 1
  - Orosi – 1
  - Pixley – 1
  - Pop-up Library - 1
  - Springville – 1
  - Strathmore - 1
  - Terra Bella – 1
  - Three Rivers – 1
  - Tipton – 1
  - Visalia – 2
  - Woodlake – 1
- **Tulare Public Library – 2**
  - Tulare Public Library 2

In addition to the 49 self-check stations for patron use, Fresno County also utilizes RFID pads at staffed circulation desks and for checking in returned materials in staff work areas. There are 30 RFID pads being used in this manner.

Question 7 (received via email)

On Page 28, question 2 – Will these 13 staff indicated be SJVLS administrators and will they be highly involved with the system implementation?

Answer 7: The 13 staff members involved in training on the configuration and administration of the LMS will include the 3 staff members from SJVLS responsible for maintaining the LMS, and the 10 jurisdictional system administrators, from our member jurisdictions. The 3 SJVLS staff members are the System Administrator, the Associate System Administrator, and the Web Development Librarian. SJVLS staff will be the main contacts for the system implementation and will work with the vendor to complete the initial set up. Once the initial system implementation is completed, the 10 jurisdictional system administrators will be responsible for maintaining and

updating components of the ILS for their respective jurisdictions, which is why they are included in the training.

Question 8 (received via email)

On page 28, question 3 – Is SJVLS requesting five dedicated training modules for each of those five topics? Is so, is this driven by job roles?

> **Answer 8:** Yes, we are requesting training for library staff on each of those topics to ensure they understand how to perform their job duties in the context of a new LMS. These trainings are driven by the staff's job duties at their libraries. The staff included in these trainings will be supervisors and/or trainers from our member jurisdictions.

Question 9 (received via email)

On page 28, questions 2 & 3 – are asking for approx. 150 people to be trained, but state there will be 749 user accounts. How will the remaining staff be trained?

> **Answer 9:** The staff members receiving the training will be jurisdictional system administrators, supervisors, and trainers from the member jurisdictions. They will be responsible for using the information gained through the training to develop procedures, training materials, and provide training to the remaining staff members in their jurisdiction.

Question 10 (received via email)

Will members from the 10 libraries be part of the implementation team?

> **Answer 10:** Yes. The jurisdictional system administrators from our member jurisdictions will be a part of the implementation team, however, SJVLS staff will be the primary contacts and will be doing the bulk of the implementation work.

Question 11 (received via email)

Can you elaborate on the selection process / voting?

> **Answer 11:** The selection process will be done in two phases. The first phase will involve SJVLS staff reviewing the responses to the questions in Appendix A – Questions Regarding LMS Functionality. Each question will be rated either "Meets SJVLS's needs", "Does not meet SJVLS needs", and "No Opinion" based on the provided description of the functionality. All responses whose answers to the LMS functionality indicate they meet SJVLS's needs will be passed on to the second phase.
>
> During the second phase, vendors will make a presentation on their LMS proposal to the SJVLS selection committee. The selection committee will evaluate the presentations and review the RFP responses. The selection committee will be made up of staff members from each member jurisdiction. Each jurisdiction will appoint staff members with experience or specialization in each component of the LMS including but not limited to circulation, cataloging, acquisitions, serials, and e-resources.
>
> After the presentations, each jurisdiction will fill out a single evaluation sheet for each LMS and return it to SJVLS. The evaluation sheet will score each LMS on a scale of 1-5 on various tasks or components within the LMS. SJVLS will average the scores from each member to determine the

final scores. After the scores have been averaged, costs will be factored in before a final decision is made.

Question 12 (received via email)

What is your motivation for going out to bid at this time?

> **Answer 12:** It was suggested by the attorney for SJVLS that we should issue an RFP to remain abreast of new vendors, new technologies and platforms that may have evolved since the issuance of the last bid. Also, to ensure that pricing for any product reviewed remains competitive amongst a list of competitors. Lastly, the RFP process ensures that no vendor, entity, or persons can claim that SJVLS is biased or otherwise influenced when it comes to making decision of such a magnitude.

Question 13 (received via email)

How does the release of this RFP align with the recommendations made by Carson Block and Joe Matthews in their April 2020 ILS assessment?

> **Answer 13:** The consultants recommended continuing using Horizon for another three-year term before releasing an RFP. SJVLS agrees with the need to release an RFP, however it feels there is still ample time to initiate this process now as opposed to later when further economic issues may hamper our reserves and capacity to seek the possibility of new implementation.

Question 14 (received via email)

Does your current ILS contract have the option to renew or are you required to go out to bid to establish a new contract with your current vendor (SirsiDynix)?

> **Answer 14:** The current contract will expire on June 30th, 2020 and SJVLS must solicit bids in order to procure an ILS.

Question 15 (received via email)

When do you expect an agreement to be signed and completed with your selected vendor?

> **Answer 15:** SJVLS hopes to complete and sign an agreement with the selected vendor as soon as reasonably possible after making the selection. The selection committee will make a recommendation to the Administrative Council in early January, and once approved an agreement can be drafted. Barring delays, we hope to complete and sign an agreement no later than late March or early April.

Question 16 (received via email)

What is your annual software subscription budget for a new system?

> **Answer 16:** SJVLS budgets annual software subscriptions costs as a part of our membership fees, with increases of 2% from year-to-year. This year's budget is $154,000. SJVLS would prefer to limit year-to-year increases in annual subscription costs to 2% of the previous year's total.

Question 17 (received via email)

What have you budgeted for implementation costs?

Answer 17: SJVLS has budgeted $700,000 for implementation costs.

Question 18 (received via email)

What challenges do the SJVLS member libraries face?

Answer 18: Some of the challenges SJVLS member libraries face include our large geographic layout, declining engagement, budget uncertainty, and the challenge of trying to meet a wide range of patron needs on shrinking budgets.

Question 19 (received via email)

What additional services would SJVLS like to offer to their members?

Answer 19: Additional services SJVLS is interested in offering our members include a platform for creating and sending newsletters or other information with the goal of increasing patron engagement. However, one of the biggest challenges to adding additional services is the limited number of SJVLS staff to provide support for those services.

Question 20 (received via email)

Should we send our proposals to Christopher Wyman's attention? Is there a specific contact we should add to the address shown on Page 1?

Answer 20: Proposals should be addressed to Christopher Wymer's attention.

Question 21 (received via email)

The branding on "Valley Cat" catalogue is the same across all libraries. Is this the goal or do individual libraries seek their own catalogue branding?

Answer 21: Yes, SJVLS's goal is to have the "ValleyCat" branding be the same for each member's catalog profile, but to allow customization of messages, or announcements. We aim to provide a uniform theme for all catalog profiles, so the user interface is consistent in the event patrons move between jurisdictions. However, we want to allow our members to highlight their individual programs, or to provide specific information about their services, such as curbside pickup information or links to an appointment form.