2014

# SWAN ILS Recommendation

## ILS Committee Report & Recommendation

SWAN Integrated Library System Committee report to the SWAN Board & Member Libraries, including overview of research which commenced November 2012, transition to formal RFP process, hiring of RMG Consulting, use of Task Force Group sub-committees, review of submitted vendor proposals, invitation for on-site software demonstrations, two rounds of scoring based on set criteria, and a recommendation to the SWAN Board.

Aaron Skog & Jeannie Dilger, ILS Committee Co-Chairs
System Wide Automated Network
2/6/2014

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# SWAN ILS Committee Recommendation

## Recommendation Summary

The SWAN ILS Committee is proud to present to the SWAN Board and its member libraries a recommendation on the next integrated library system software for the consortia. During the last 15 months, the ILS Committee:

- Sought the most broad input that process would allow; 50 persons in the consortium were involved during the Task Force assessment of software
- Completed a process which eliminated bias
- Conducted all meetings in compliance with the Open Meetings Act

Based on the selection process recommended by Rob McGee of RMG Consulting, the ILS Committee conducted two rounds of scoring. We recommend the following:

1. **MOVE FORWARD WITH CONTRACT NEGOTIATIONS WITH SIRSIDYNIX**
   We believe SirsiDynix will provide SWAN libraries the fullest feature set to address:
   a. **Our immediate goals**
      **Why?** SirsiDynix's proposal addresses all areas of service that SWAN has sought, which includes full e-book integration into the OPAC; patron notification that includes automated phone calls, text messaging, and email; rich data analysis tools; and mobile applications for staff and patrons.
   b. **Future goals**
      **Why?** SirsiDynix has a solid vision for its products and services. There will be a Web-based library staff client which has targeted milestones for delivery to its customers. The initiative called BLUEcloud presents a well-designed technology platform for delivering a flexible and mobile suite of services, built upon contemporary cloud-based architecture.
   c. **A Strong Partner**
      **Why?** SirsiDynix is an international company that is well-prepared for software development, has led the industry in the number of new customers and has outsold competitors by a wide margin. SirsiDynix received excellent approval ratings from the consortial customers SWAN contacted. SWAN will be a "Strategic Preferred Partner" with SirsiDynix through which SWAN will be involved in future software development of products and features.

2. **NEGOTIATE A "SOFTWARE-ONLY" SERVICE AGREEMENT FOR THE SYMPHONY ILS, BUT UTILIZE "SOFTWARE-AS-A-SERVICE" FOR OTHER AREAS OF OUR SERVICES**
   **Why?** With this arrangement, SWAN will manage and house the ILS database. This arrangement will result in SirsiDynix providing support for its software, with SWAN managing the server hardware in the following arrangement:

a. **Symphony:** the ILS server will reside on-site in the RAILS Burr Ridge datacenter. This will ensure that SWAN is managing library data and 3<sup>rd</sup> party SIP2 connections directly.

b. **Enterprise:** the OPAC will reside as a Software-as-a-Service (SaaS) arrangement outside of the SWAN network that SirsiDynix will manage and adjust for dynamic growth.

c. **BLUEcloud:** the new Web-based library staff client will reside in a SirsiDynix cloud environment, utilizing the Amazon Web Services. This platform for delivering services follows the latest technology trends for flexible growth, redundancy/failover, and mobile access.

SWAN, RAILS, and SirsiDynix IT staff have confirmed SWAN's existing ILS hardware can be used to run the Symphony ILS. The 2013 SWAN migration to a virtualized infrastructure at $168,000 has proven to be a wise choice and will serve the consortia well. Some "future proofing" for the hardware will be needed and will be included in the final cost estimate.

3. **NEGOTIATE AN AGREEMENT WITH SIRSIDYNIX THAT INCLUDES THE FOLLOWING PRODUCTS & SERVICES**

The SWAN ILS Committee recommends moving forward with the following strategy.

- Include as many products available in order to cultivate a rich environment for SWAN libraries to take advantage of
- Negotiate a fixed price model for adding new libraries to the consortia
- Negotiate a fixed maintenance cost that has fixed increases and/or is capped
- Negotiate unlimited "licenses" for SWAN and member library staff

With SirsiDynix, SWAN will have the following products and solutions.

| ILS | Product Name & Description |
|---|---|
| **OPAC** | **Enterprise** |
| | Each SWAN Library will have its own catalog "profile" that will highlight its collection and the SWAN consortium collection. Enterprise integrates with e-book vendors, allowing a seamless interaction for downloads. |
| **Digital Asset** | **Portfolio** |
| | A digital asset management solution that allows libraries to make their digital collections to integrate into the Enterprise OPAC. Portfolio includes OAI-PMH capabilities. |
| **Mobile app** | **BookMyne+** |
| | Each SWAN member library will have the option to have its own mobile app with individual branding. The mobile app will be available for Apple customers in the iTunes store or for Android mobile users from the Google Play store. |

| | |
|---|---|
| **eBook Management** | **eResource Central** |
| | Powerful management of e-books that will auto-populate the OPAC without requiring SWAN catalogers to load bibliographic records for OverDrive & Axis360. Collections for SWAN libraries will be targeted to each library's individual Enterprise OPAC. eBooks for audiences can be managed to show in an Enterprise profile for adults or children. |
| **Online Subscriptions** | **EBSCO Discovery Service (EDS) integration** |
| | EDS integration brings EBSCO content to the search interface of Enterprise and Portfolio, giving library users faceted searches of EBSCO databases through a familiar interface. |
| **Social** | **Social Library (Facebook app)** |
| | Social Library is a fully native Facebook application that lets member library users search the catalog, place holds, view, rate, discuss and share library materials all within Facebook. |
| **Data Analysis** | **BLUEcloud Analytics, which includes Web Reporter** |
| | Library staff will have access to Web-based reports created for their library |
| **Telephony** | **SirsiDynix Voice Automation (SVA)** |
| | Automated "robo-calling" will be a consortia-wide tool for notifying patrons via phone calls. |
| **Web-client** | **BLUE cloud suite** |
| | SWAN libraries will have Mobile circ available at go-live. Over the next two years we will have a new staff client that will be entirely Web-based and will allow SWAN to bypass client upgrades, and be entirely mobile using tablets and other devices either inside or outside your library. |
| **Text Notification** | **Symphony SMS Module** |
| | Patrons will be notified by text messaging. Costs are included in SWAN annual maintenance. |
| **Delinquent Accounts** | **Interface included in Symphony** |
| | SWAN will continue its use of Unique Management but with better integration than ever within the Symphony ILS. |
| **SIP2 Unlimited** | **3rd Party Integration** |
| | All existing SIP2 interfaces will continue with no additional cost to the SWAN library. Any SWAN library that wishes to move forward with SIP2 enabled services for self-check, AMH systems, or other may do so with no additional costs from the SWAN consortium. |
| **NCIP** | **NISO Circulation Interchange Protocol** |

| | |
|---|---|
| | Standard that exchanges messages between systems that allows them to perform the functions to lend and borrow items. "SirsiDynix Certified Solutions Providers" offer NCIP-certified products, where SirsiDynix certifies that their products are compliant. This interface is priced per vendor. |
| **Training** | **SirsiDynix Mentor** |
| | Online self-paced training system available within the SirsiDynix support willcover dozens of different topics, from basic/introductory/overview sessions (such as WorkFlows Essential Skills and Cataloging Basics) to specific administrative topics (Enterprise Book Lists), and new features and releases.  Training will be available before and during migration, as well as afterward - anytime new staff are added. |
| **Inventory** | **Mobile Circ** |
| | MobileCirc will enable library staff to work wherever they are, with or without a data connection. Features include: mobile circulation, which has common tasks like check-ins, checkouts and renewals; register new users by scanning driver's license (selected regions only) or by manually entering user information; flexible inventory, integrates with Bluetooth scanners to make taking inventory faster and easier; efficient shelving, provides real-time lists of candidates for weeding and items needed to fill holds. |

# Overview of the Selection Process

What follows is an overview of the work conducted by the SWAN ILS Committee in support of the 3-year strategic plan.

## Strategic Plan

The SWAN 3-year strategic plan (2012-2015) was adopted in September 2012. Of upmost importance to the consortium was **STRATEGIC DIRECTION #1: USE TECHNOLOGY TO PROVIDE THE BEST PATRON EXPERIENCE.**

**Goal #1: Recommend direction for SWAN integrated library system (ILS) platform**

Measurable Accomplishments:

- • SWAN Board determines ILS committee & creates charge
  - o ILS Committee determines goals & sets timeline
  - o Conduct informal demonstrations & investigation with other libraries, consortia
  - o Create SWAN members needs assessment
- • Milestone: Should we keep looking?
  - o Determine length of extension with Innovative (expires May 2013)
  - o Determine evaluation criteria for ILS
  - o SWAN Executive Director negotiates extension of current Innovative contract
  - o Create formal request for proposals (RFP) for ILS/OPAC (note: OPAC can be separate product)
  - o Conduct official RFP demos with membership, committee, staff, board
  - o Evaluate vendor responses & review stakeholder feedback
- • Milestone: Selection of next ILS

## ILS Committee Representation

SWAN Board member Jeannie Dilger (Director of La Grange Public Library, ILA President-Elect) and SWAN Executive Director Aaron Skog were appointed co-chairs of the ILS Committee. The SWAN Board approved a written charge and a composition for the nine-member committee: four SWAN staff, five library representatives.

The co-chairs invited the SWAN member library staff to self-nominate with a written statement. Selection of the five library staff was based on balancing expertise in ILS functions, experience with other ILS platforms, and library service areas. SWAN staff was selected by invitation.

| Name | Job Title | Library |
| --- | --- | --- |
| **Aaron Skog, Co-Chair** | Executive Director | SWAN |
| **Jeannie Dilger, Co-Chair** | Director | La Grange Public Library |
| **Kate Boyle** | Member Services Manager | SWAN |
| **Mary Lou Coffman** | Special Projects Coordinator | SWAN |
| **Pilar Shaker** | Circulation Services Manager | Hinsdale Public Library |
| **Tony Siciliano** | Bibliographic Services Manager | SWAN |
| **Ahren Sievers** | Technology Librarian | Elmwood Park Public Library |
| **Vickie Totton** | Assistant Director | Cicero Public Library |
| **Stacy Wittmann** | Library Director | Eisenhower Public Library |
| **Rebecca Teasdale (resigned August 2013, replaced by Stacy Wittmann)** | Assistant Director | Oak Park Public Library |

The ILS Committee convened for its first meeting on November 18, 2012. The charge of the Board for the Committee required a presentation and recommendation to the SWAN Board at its April 19, 2013 meeting. At that meeting the SWAN Board requested that the committee remain in place and continue its work overseeing the ILS selection through 2013-2014.ILS Committee Research: Membership Survey (February)

To complete the Strategic Plan objective of conducing a SWAN member needs assessment, the SWAN ILS Committee conducted a two-week survey in February 2013. We received 515 responses to the survey from 71 member libraries (SWAN has 78 member libraries now in 2013, down from 80). The goal of this survey was to provide some guidance to the ILS Committee as it moved forward in its research. The survey was intended to be broader in its focus but answer crucial questions regarding SWAN's future size and direction.

Library directors were asked a special subset of questions within the survey if the library work group "Administration" was selected at the start of the survey. The results of library director responses are included in the full report.

**General Survey Responses**

We asked that the survey responder identify his or her library work group. The ILS Committee was interested in breaking down the responses by these groups in order to see if there was consensus or divergent viewpoints on the survey questions. The results of all responders are displayed below.

**Which best describes where you work in the Library?**
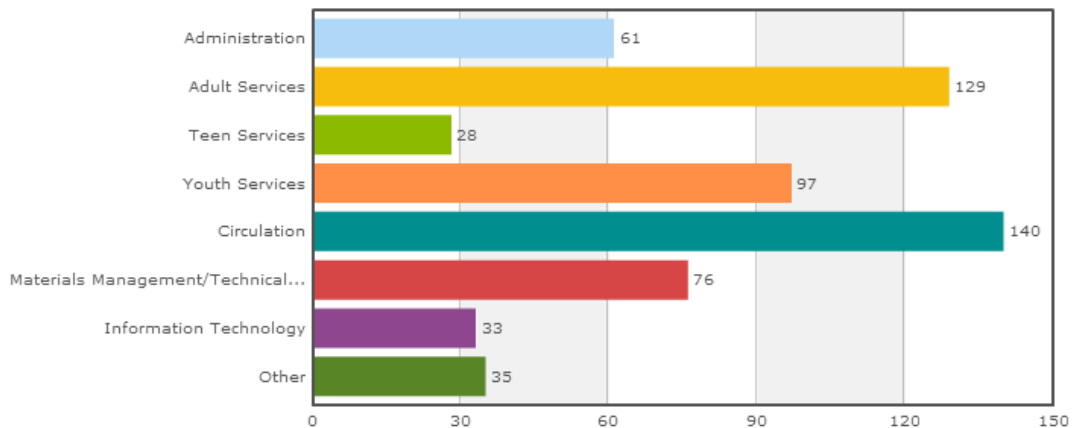


**Ease of Use: Staff vs. Patrons**

The first question  was designed to help the Committee determine how to weight various aspects of our next ILS during the selection process. The overall response to this question for 65% indicated that "ease of use for patrons" should be a higher priority.

*If you had to choose between two ILS programs; would you prefer ease of use for the staff or ease of use for patrons?*  (501 responses in 515 results)

**19%**

**65%**

**16%**

_____
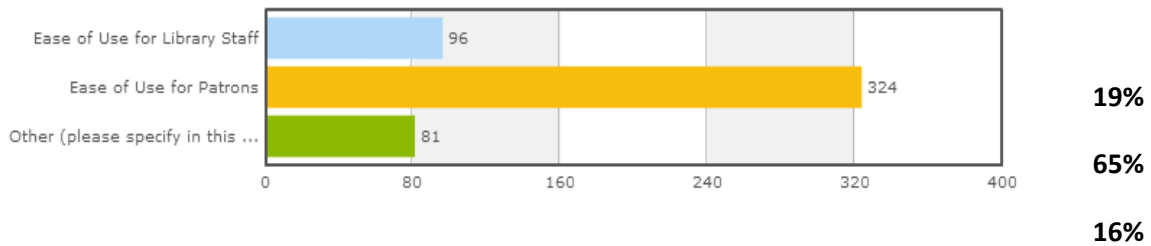
**Patron Features**

This survey section was specific to library staff expectations on five areas of the ILS software for patrons. The survey required library staff to designate "very important" to "unimportant" on the five areas. The five areas of this section of the survey can be summarized as follows:

1. **Easier to use OPAC**
   70% rated this "very important," which was the highest within this section of the survey

2. **E-Resources are downloadable/accessible via OPAC**
   42% rated "very important" followed by a close second of "important" at 40%

3. **Patrons can opt into a variety of online services (customize their experience)**
   47% rated "important"

4. **Mobile web interface for OPAC**
   44% rated "important"

5. **Patron ability to access and edit their own personal information (email address, etc)**
   38% rated "very important" & 37% rated "important"

**In your experience rank the following features according to importance to patrons**

_Easier to use OPAC_ (500 responses in 515 results)
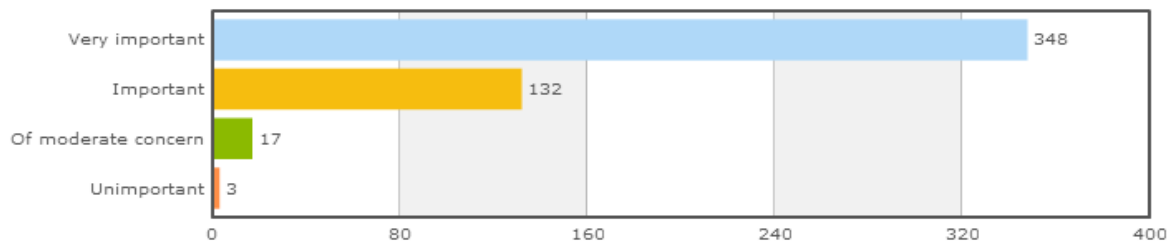
*E-Resources are downloadable/accessible via OPAC* (501 responses in 515 results)
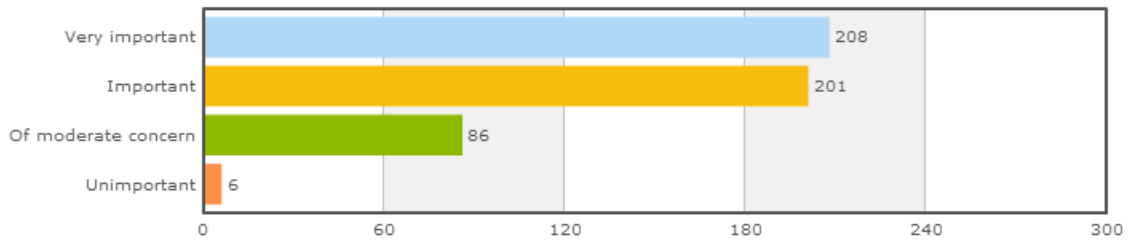


*Patrons can opt into a variety of online services (customize their experience)* (496 responses in 515 results)
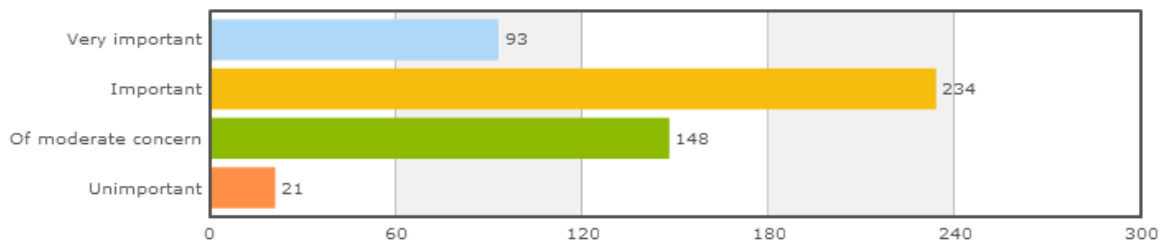


*Mobile web interface for OPAC* (496 responses in 515 results)
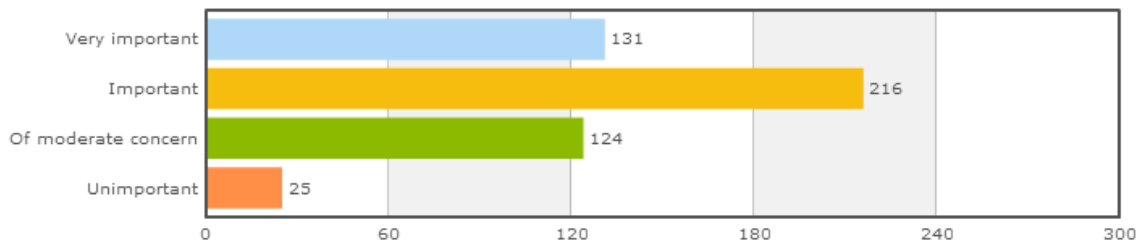


*Patron ability to access and edit their own personal information (email address, etc)* (502 responses in 515 results)
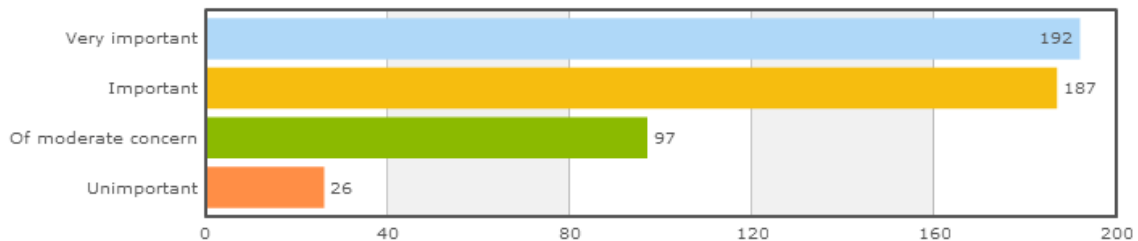


**ILS Features – Ranked**

Library staff was asked to put into order ten software features where a 1 was considered the most important and 10 was considered the least important of the ILS features.  All survey respondents are displayed.

The first observation from the survey results is that the "Consistent and reliable response time at peak hours" was ranked highest of the 10 features, followed by "Quality training and accessible documentation for staff " ranked second highest, and the "Strong support and ongoing development from the vendor" as a close third.  The complete list, in order from most important to least important, is as follows:

1st **Consistent and reliable response time at peak hours**

2nd **Quality training and accessible documentation**

3rd **Strong support and ongoing development from the vendor**

4th **Robust bibliographic data tools allowing for easy manipulation by staff & vendors**

5th **Notifications via phone, email or text**

6th **Customizable holds system designed for a multi-library group**

7th **Support for a variety of mobile devices**

8th **Staff and Patron screens are similar**

9th **Seamless and easy offline system**

10th **Operating system neutral**

The full survey report is available online within the SWAN website.

## ILS Committee Research: The ILS Landscape

As of April 2013, the nine committee members:

- Conducted research to understand the current ILS software landscape
- Completed interviews with nine ILS software platform representatives
- Conducted interviews with customers of comparable size and make up
- Conducted a membership survey to assist with focus questions
- Completed a preliminary weight scale for ILS software evaluation

**The Nine ILS Platforms Researched**

1. Sierra, Innovative Interfaces Inc.
2. Virtua, VTLS
3. Polaris, Polaris
4. Alma, ExLibris

5. WorldShare, OCLC
6. Symphony, SirsiDynix
7. Evergreen (open-source), Equinox Software
8. Koha (open-source), ByWater Solutions
9. Kuali OLE (open-source)

**Customers Contacted**

1. Bibliomation, CT (Evergreen)
2. North East Kansas Library System, KS (Koha)
3. TRAC, Yellowhead Regional Library System, Alberta, Canada (Polaris)
4. Indiana University, John McDonald, Associate Dean for Library Technologies & Deputy Director-Data to Insight Center, Pervasive Technology Institute (Kuali OLE)

## Nine Platforms Considered by the SWAN ILS Committee

### Alma (Ex-Libris)

Alma's largest consortium is Orbis, which has 37 academic libraries in Washington and Oregon. There are currently no public library customers. The system is entirely web-based and cloud-based. There is no OPAC, so customers use an overlay discovery layer product such as Primo or Bibliocommons.

### Evergreen (open source, Equinox Software)

Evergreen was designed for a large consortial environment (140 public libraries in Georgia). Other large consortial clients include libraries in the states of Indiana and South Carolina. Their largest circulation is King County with 22 million circs/year. There are no size limits. You can set rules for the whole consortium or at the library level, or set up groups within the consortium. Evergreen is currently desktop client-based, but the community is considering a web-based version.

### Koha (open source, ByWater Solutions)

Koha's largest consortia include MassCat, a consortium of 71 multi-type libraries. SWAN would be their largest client in terms of annual circ, but not in bibs or number of libraries. Koha has no size limits. Client is web-based. There is a large development community, so adding functionality can happen more quickly than in a vendor-based environment.

### Kuali OLE (open source, not vendor supported yet)

Kuali OLE is an open-source system that is being developed by a group of academic libraries. University of Chicago will be the first to go live this summer. They are not currently working with any public libraries.

### Polaris

Polaris' 675 customers are primarily public libraries. Large consortial customers include Illinois Heartland (IHLS), with 427 libraries, and The Regional Automation Consortium (TRAC) in Alberta, with

170 libraries. The system has no limits on bibs or items. They are migrating to a web-based client in the next three years. They are also focusing on working with 3rd-party vendors, and currently have relationships with 60 partner products.

### Sierra (Innovative Interfaces)

Sierra has over 125 live installations, and their largest consortial customer is Indian Head Library System in Wisconsin. Sierra has the same size limits (locations, patron and item types, etc.) as Millennium; they will consider raising limits upon request. Screens and terminology are designed to be similar to Millennium, to make training and migration easier on staff. Sierra is desktop client-based.

### Symphony (SirsiDynix)

Large consortial customers include RSA in Illinois (260 libraries). While there are no technical limits to the system, there are practical limitations for operations. They will be releasing a web-based circ client in June 2013, under an company initiative called BLUEcloud (Best Library User Experience).

### Virtua (VTLS)

Virtua has a variety of consortial configurations, depending on the level of autonomy members want. Their largest consortium is 227 academic and public libraries in Western Switzerland. Their largest U.S. circulation is Queens Library with 30 million circs/year; Hong Kong has 60 million. They have not yet run up against any size limitations. Virtua has a configuration tool that allows for setting policies (location, patron, item types, etc.) at a granular level. The staff client provided limited information on each screen.

### World Share (OCLC)

World Share is relatively new; the largest consortium to date is an academic consortium of 7 libraries in Nebraska. World Share is developing "groups" which will allow greater autonomy of libraries, essentially functioning as a stand-alone but then sharing patrons, bibs, and items. There are no limits because it is cloud-based. Circulation was developed first, then acquisitions. OCLC will be bringing in interlibrary loan next, and then cataloging.

## Primary Features of the Next Generation Platform
The Committee focused on five areas during our interviews:

1. Consortia "friendliness" of the software and its design
2. Flexibility for further enhancements and development
3. Complex request & holds management for materials
4. Features pertaining to e-books and other electronic content
5. Openness of the software: methods for 3rd party integration

Based on the membership survey data and a review of the Illinois Heartland Library System ILS evaluation during its RFI, the SWAN ILS Committee created a preliminary weighting and scoring that could be used during SWAN's formal RFP process.

## Progress Report & Recommendation to SWAN Board (April)

In the April 2013 report to the SWAN Board, the ILS Committee made the following recommendations:

1. Executive Director/Board negotiate a flexible extension to the current Innovative agreement: **COMPLETED**
2. Board hire an RFP consultant & approve funds: **COMPLETED, Selected RMG, approved funds at June Quarterly**
3. Board determine composition of the SWAN RFP Committee: **COMPLETED, Requested ILS Committee continue**
4. ILS Search Committee / Consultant conduct focus groups of members: **COMPLETED, Task Force Groups formed during RFP process**
5. RFP Committee / Consultant proceed with a formal request for proposals (RFP) to be completed in 2013: **COMPLETED, RFP issued in July 2013; Recommendation made February 2014**

## Consultant (May)

SWAN contracted with RMG Consultants to assist in the search for our next ILS. Rob McGee is the President of RMG Consultants and assisted the ILS Search Committee in creating the Request For Proposal (RFP). Mr. McGee facilitated the scoring of the proposals, and assisted with the contract negotiations of the chosen vendor.

## ALA Conference (June)

The American Library Association Conference provided a unique opportunity for the SWAN ILS Committee and the SWAN membership as a whole to visit vendors during the exhibit period of the conference.

**Guidance for SWAN Member Libraries**

At the June Quarterly meeting, the ILS Committee provided several documents and methods for providing feedback to the group; the ALA Memo, ILS Guides, and Glossary documents are available for review on the SWAN website.

We suggested libraries ask the following questions at ALA.

1. Who are your customers?  What is your largest consortium? What types of libraries (public, academic, multitype)?
2. How will this integrate with Overdrive (or my other e-content services like Freading, 3M Cloud, Zinio, etc.)?
3. How do you provide access for other 3rd-party vendors (self-checkout, mobile apps, RFID, etc.)?
4. Does the client work on a desktop, or is it web-based?  If desktop, how frequent are client updates?
5. What kind of limits does this system have (# of items, holds, loan rules, etc.)?
6. What is the process for suggesting new features, and how long does it take for them to be developed and deployed?

Feedback from attendees was collected via email and reviewed by the ILS Committee.

**ILS Committee ALA Research**

The ILS Committee conducted a series of meetings with seven ILS vendors. These interviews were arranged over three days of the conference. We also arranged a social event for library staff of the seven ILS vendor/platforms to meet with the Committee and share their experience with the vendor and ILS software.

| Date & Time | Vendor | Who |
|---|---|---|
| Saturday 6/29 10am – 11am | equinox SOFTWARE | Rob Hermann, Director of Sales; Bill Erickson, Senior Software Developer (and one of Equinox's co-founders) |
| Saturday 6/29 11:30am – 1pm | Innovative Customer Luncheon | Met with CEO Kim Massana |
| Saturday 6/29 1:30pm – 3:00pm | Innovative | Bill Easton, Director of Customer Sales, Western Region; Jay Shankar, Senior Vice President Services and Support; Steve Neilson, Vice President, Strategic Accounts |
| Saturday 6/29 5pm | SWAN Drinks on Us! kitty o'sheas | Customers of III/Sierra, Polaris, Equinox/Evergreen, ByWater/Koha |
| Sunday 6/30 10am – 11am | VTLS | Cecee Yourshaw, Vice President of Operations |
| Sunday 6/30 1:30pm – 2:30pm | ByWater SOLUTIONS | Nathan A. Curulla, Owner, EVP; Brendan A. Gallagher, CEO |
| Monday, 7/1 10am – 11am | POLARIS LIBRARY SYSTEMS | John Richardson, Director, Library Partnerships |
| Monday, 7/1 8:30am – 9:30am | SirsiDynix® | Rick Branam, Vice President, Global Accounts & Alliances; Jeff Myers, Field Sales Representative |
| Monday, 7/1 12:30pm – 2:00pm | OCLC® | Paul Cappuzzello, Regional Marketing Manager; Andrew Pace, Executive Director, Networked Library Services; Matt Goldner, Product and Technology Advocate |

## Conclusions Drawn from ALA Conference

The ALA conference allowed the ILS Committee to gain further insight into the integration of e-books, the open-source options and the communities supporting them (Koha and Evergreen), multi-language capabilities, and the enhancements process. In summary, what we found:

- E-book integration was moving forward with VTLS, ByWater, Innovative, Polaris, and SirsiDynix.
- Equinox did not have e-book integration, but software development could be sponsored.
- Of all the meetings, the SirsiDynix overview meeting left a very strong impression on the ILS Committee members attending that the BLUEcloud strategy, particularly the eResource Central

> integration of e-books, made the most sense from a patron perspective, but more importantly, from a management perspective of multiple e-resources.

- OCLC has designed a well-thought-out ILS; however it was far from ready for SWAN, lacking what we would call "basic" functionality.
- Innovative Interfaces has new corporate management that wanted feedback regarding what concerned SWAN. CEO Kim Massana noted that he wanted to make sure that Innovative and SWAN had a good relationship, even if III were not selected.

The ALA experience raised SWAN's profile significantly with all of the vendors involved. All of the vendors noted that many library staff visited and asked questions. The vendors found a dedicated, serious group of consortia members.

# RFP Issued (July)

The Committee met again on July 11th to continue to make necessary edits to the RFP, discuss the duties and expectations of the task forces, and give final approval of the self-nomination form for the task forces. The ILS Committee put a tremendous amount of effort into the document, which utilized templates from RMG Consulting. The RFP was issued July 26th.

## Screening

It was agreed upon within the ILS Committee that it would required that the two questions below be answered YES by the proposer in order for the proposal to be considered by SWAN. The purpose of this screening was to determine that the ILS was in a production environment of comparable size to SWAN. The ILS Committee wanted to make sure that no "vaporware" would be proposed, or that a system proposed had never been deployed at a comparable size to SWAN.

| Questions to Proceed with SWAN RFP | Answer YES or NO |
| --- | --- |
| 1. Does the proposer's software presently run a group of 25 or more independent public libraries that has been running in a production environment for 1 full year? The libraries must be independent organizations and at least 25 of them must be public libraries. | |
| 2. Does the proposer's software presently run an installation with an annual circulation of 10 million transactions or more? This will include check-outs of combined home library patrons and combined reciprocal borrower patrons. | |

If the proposer has answered no to one or both of these questions, do not submit a proposal to SWAN.

Any proposal received that has answered no to either of these questions will be rejected.
If the proposer has answered yes to each of these questions, please note these libraries below and then again in "Part 1.3: Vendor's Experience" of your proposal.

Based upon this screening requirement, the ILS solutions Koha from ByWater Solutions and OCLC WorldShare were eliminated from the process.

1. Sierra, Innovative Interfaces Inc.
2. Virtua, VTLS
3. Polaris, Polaris
4. ~~WorldShare, OCLC~~
5. Symphony, SirsiDynix
6. Evergreen (open-source), Equinox Software
7. ~~Koha (open-source), ByWater Solutions~~

## Proposals (August)

In response to our RFP, SWAN received five proposals. Vendors took considerable time in preparing well-developed proposals, some of which were over 1000 pages.  ILS Committee members were instructed to read each proposal independently. Each committee member would be called upon during the scoring to speak about particular areas of expertise.  Proposals were made available for all SWAN libraries online within the Member's Only section of the SWAN website. The five proposals received were the following:

1. Sierra, Innovative Interfaces Inc.
2. Virtua, VTLS
3. Polaris, Polaris
4. Symphony, SirsiDynix
5. Evergreen (open-source), Equinox Software

## Scoring Round 1 (September)

The ILS Committee met on September 19 -20 with Mr. McGee to conduct a first round of scoring.

- Scoring in the 16 criteria was completed with unanimous consensus: the ILS Committee was in 100% agreement with scores
- Final totals were not tabulated or revealed until the end of the second day of scoring: this avoided any favoritism or "push" to score a particular proposal over another proposal

Based on this scoring, the vendors with the two lowest scores were eliminated. The vendors Equinox, SirisDynix, and VTLS were invited for on-site software demonstrations at SWAN headquarters in Burr Ridge.

**Round 1 Points**

| | Equinox | Innovative Interfaces | POLARIS | SirsiDynix | VTLS |
|---|---|---|---|---|---|
| Round 1 Points | 142 | 110 | 111 | 150 | 129 |

*200 POINTS MAXIMUM*
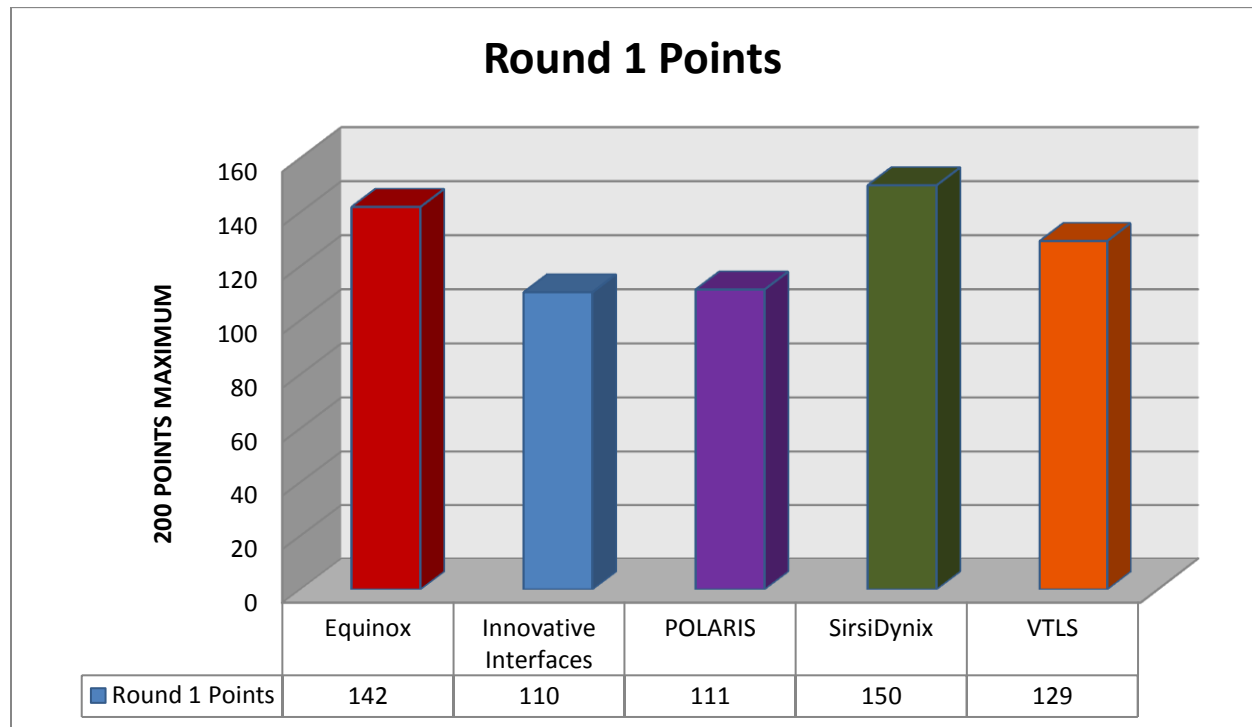
## Why Innovative & Polaris Proposals Were Eliminated

Both Innovative and Polaris were eliminated strictly based upon scoring. Areas within the scoring criteria for each that affected the scoring would include the following:

**Innovative Interfaces**

- Training was scored 3 of 11, because the proposal had very little to no training noted
- ILS system limits within Millennium that were noted as remaining in Sierra were a concern
- Overall suitability ranked Innovative's proposal last of the five proposals
- Innovative ranked 2nd in Resource Sharing, with SirsiDynix scoring 1st
- Ranked lowest in Quoted Costs of Proposal, with 11 of 20 total points for this RFP criteria

**Polaris**

- Ranked 2nd of the five in regards to Quoted Costs of Proposal, with 18 of 20 points
- The Polaris data migration plan noted that acquisitions data would be problematic (only 2 of 3 data elements could be migrated), which was reflected in the scoring for the Vendor's Plan & Ability for Fulfilling Proposal, and the Costs to SWAN implied by the Proposal
- Polaris runs solely in a Windows environment, specifically a Windows Terminal Server environment, which would require training for SWAN staff providing system administration, as our area of expertise lay in a Unix/Linux environment, which was factored in the score for Costs to SWAN Implied by the Proposal
- Polaris would require all SWAN library workstations needing to access to run on Windows 7, which would require member libraries to upgrade to that Windows version, or replace computers to achieve that requirement; this affected the scoring of Costs to SWAN Implied by the Proposal, resulting in 8 of 20 possible points
- In consortia features Polaris was ranked the lowest, with 1 of 10 possible points

## Round 1 Scoring Details

Details on the round one scoring are included below. The 16 criteria were discussed during the two-day scoring period. The Committee agreed on how to award points within the 16 criteria based on what was noted during the construction of the RFP document. Notes under each reflect some, but not all, of the areas discussed. Refer to **Appendix A** for the criteria and scoring process.

| Evaluation Criteria: Round 1 | Points Possible | Equinox | Innovative Interfaces | POLARIS | SirsiDynix | VTLS |
|---|---|---|---|---|---|---|
| **Applications functions and capabilities of proposed software [Six areas of functionality below, ranked 1 (lowest) through 5 (highest)]** | **30** | **16** | **18** | **16** | **28** | **20** |
| Cataloging | 5 | 1 | 4 | 2 | 5 | 4 |
| | | Not enough information to really determine HOW staff perform the tasks | Very good, does all a cataloger needs, a few areas could be better | | clear screens, staff friendly; FRBR not ready; RDA compliant | granular, powerful; appearance is off-putting |

| Evaluation Criteria: Round 1 | Points Possible | Equinox | Innovative Interfaces | POLARIS | SirsiDynix | VTLS |
|---|---|---|---|---|---|---|
| Acq & Serials | 5 | 1 | 5 | 3 | 4 | 5 |
| | | Does not have automatic claims | | | can customize MARC import within Acq process | |
| Circulation | 5 | 4 | 3 | 2 | 5 | 1 |
| | | Individual library granularity was the best of the five | limits to patron types exist, but will be resolved upon request in Phase 2 | the number of logins limited; cannot age Claims Returned to Lost | user friendly interface, good looking screens | a lot of granularity with loan rules; no linked patron feature; no images easily incorporated; missing a lot of things |
| Reports | 5 | 2 | 1 | 4 | 5 | 3 |
| Task force wants a tool that can do everything, a lot of control at the library level. The proposals wording of "library" in this area of functionality really made it difficult within the consortium environment to determine the report capabilities. Inventory was also important here. | | Out of the box day-one reports are good, available immediately. | Create Lists, not viewed as a report, it's a way to massage data. WMR, Decision Center are the reporting tools. | | a huge amount of reports to select; custom reports could be included in consulting hours to have for day-one reports at go-live | InfoStation: hold stats, page lists. Any ad-hoc is done using Crystal Reports. Oracle can be queried. |
| OPAC | 5 | 3 | 2 | 2 | 5 | 4 |

| Evaluation Criteria: Round 1 | Points Possible | Equinox | Innovative Interfaces | POLARIS | SirsiDynix | VTLS |
|---|---|---|---|---|---|---|
| Foreign languages integration noted for OPAC should be explored further.  Libraries will need to set up individual OPACs. | | TPAC, | tied with POLARIS | kinda "meh" | based on proposal, it sounds good | loved the full implementation of FRBR; the UI was problematic but it seems strong |
| System Administration | 5 | 5 | 3 | 3 | 4 | 3 |
| | | Software seems the easiest; client uses the XUL runner | Java-based client remains, even with Sierra | Windows based client using Remote Desktop Connection, which is a bit of a concern for a large, active consortia. | Has some nice backup capabilities; java-based client is not ideal | Staff client requires high specifications seemed high. |
| **Resource sharing functionality** | 30 | 13 | 16 | 13 | 21 | 12 |
| Holds: 5 points (ranking) | 5 | 3 | 4 | 1 | 5 | 1 |
| Note: none of the vendors have explained the concept of "volumes" to us adequately, which we will need clarification on. | | Flexibility is implied, would have liked more detail; opportunistic feature nice but not important as it might seem :) | priority paging has been a problem for 2 years | proposal dodged the description of the holds process and instead wanted to create a holds process under SWAN consultation; the holds process is not real-time in terms of Holds List | very mature holds processing | Virtual requires mediating every hold request, which is a huge problem |

| Evaluation Criteria: Round 1 | Points Possible | Equinox | Innovative Interfaces | POLARIS | SirsiDynix | VTLS |
|---|---|---|---|---|---|---|
| E-Content, online subscriptions: 5 points | 5 | 1 | 4 | 4 | 5 | 3 |
| The vendor demonstrations will assist with refining these scores. | | The traditional 856 tag method was proposed, which requires multiple bibs. | Question #64: Sierra load tables | 3M integration, working with other vendors, licensing will be needed. Resource Groups feature allows multiple to link to a single bib record. Practice with consortia seems to indicate issues with multiple OverDrive groups. | eResource Central, Single Sign-on, chart with vendors Section 3, p. 136, more vendors listed. | the answers from VTLS indicate 3M Cloud integration but the 856 tag solution remains a primary suggestion |
| OPAC scoping, holdings: Section 3 Narrative, Question 60 (5 points) | 5 | 4 | 3 | 3 | 4 | 1 |
| | | Yes, logged in or by IP range | Yes, only by IP range. | Yes, control local and system views, order of branch holdings | Yes, logged in or by IP range | System level: order same for all libraries |
| NCIP NISO standard: Section 3, Table 2.1-3 Question 1.19.16 | 1 | 0 | 1 | 1 | 1 | 1 |

| Evaluation Criteria: Round 1 | Points Possible | Equinox | Innovative Interfaces | POLARIS | SirsiDynix | VTLS |
|---|---|---|---|---|---|---|
| (1 point) | | | | | | |
| | | No. | Yes | Yes, NCIP ver 1 & 2.01 via TCIP/IP sockets & https | Yes | Yes |
| | | | | | | |
| Reciprocal Borrowing (5 points) | 5 | 5 | 3 | 3 | 5 | 5 |
| | | Granularity noted in response | Limits within Phase 1 a concern | | Good granularity | Good granularity |
| ILL: interfacing with external systems (1 point) | 1 | 0 | 1 | 1 | 1 | 1 |
| | | | | | | |
| **Overall suitability of the Vendor and proposed system to present & future needs of SWAN** | 24 | 18 | 14 | 16 | 19 | 17 |
| | | | | | | |
| **Quoted costs of proposal** | 20 | 20 | 11 | 18 | 15 | 13 |

| Evaluation Criteria: Round 1 | Points Possible | Equinox | Innovative Interfaces | POLARIS | SirsiDynix | VTLS |
|---|---|---|---|---|---|---|
| RMG looked at the overall costs; SaaS is the highest cost, on-premise was factored in | | SaaS/hosted was the lowest cost of all the configurations presented, awarded full 20 pts. | | Second place in SaaS quote; 1st place for the 2 other cost configurations | | |
| **Costs to SWAN implied by the proposal** | 20 | 17 | 17 | 8 | 16 | 11 |
| Workstations (9 points) | 9 | 8 pts for workstations: Workstations didn't match Win 2000.  1 point for peripherals:  May have to rely on community for peripheral support. | 6 for workstations: required specs for client didn't support Win8 or thin clients. 2 for peripherals | Significant issues.  3 for workstations (support for XP, Vista, and 2000 cease in 6 months), also require 10GB hard drives. | 6 for workstations: don't support Win2000 or Win8 or thin clients. | 9 for Workstations: recommend moving to better hardware, but supported. |
| Peripherals (2 points) | 2 | 1 pt | 2 pts | 1 pt | 2 for peripherals: can support anything. | 1 for peripherals: didn't support sig pads. |

| Evaluation Criteria: Round 1 | Points Possible | Equinox | Innovative Interfaces | POLARIS | SirsiDynix | VTLS |
|---|---|---|---|---|---|---|
| Staffing implications 9 points (keying in data, retraining staff…) | 9 | Staffing implications: 8 pts | 9 pts, Less learning curve for member library staff | 4: train SWAN IT staff on Windows. Staff time for keying records in Acq data migration. | 8 pts Staffing implications | 2 schedule staff for tape backup. Staff-mediated holds: would have to pay for go-live development. |
| | | | | | | |
| **Vendor's proposed training for SWAN** | 11 | 11 | 3 | 8 | 10 | 11 |
| | | remote & onsite proposed, variety of courses | No proposal; cost quotation absent; no course list; noted ease of transition | Good, small class sizes, not enough onsite training; extra costs for attendees | Thorough but not enough onsite in proposal | Very thorough |
| **Vendor's plan and ability for fulfilling proposal** | **10** | **10** | **7** | **5** | **10** | **7** |
| | | | No team assignments, no plan was submitted. | Reworking the holds process is noted. | p. 90 | |
| | | | Migration overview was solid, but was not detailed. | Conversion of 2 of 3 acquisitions data elements will be an issue for the SWAN migration. | Confidence in migration plan, evidence to fulfill the proposal. | |
| Project Management: RFP Section 1.4 | | Section 1 p. 7-14 | Brief description | p. 1-13 | Section 1 p. 9 | Section 1, p. 1-6 |

| Evaluation Criteria: Round 1 | Points Possible | Equinox | Innovative Interfaces | POLARIS | SirsiDynix | VTLS |
|---|---|---|---|---|---|---|
| Migration plan | | Performed Millennium to Evergreen migrations for several consortia customers | | Experience with migrating data out of Millennium to Polaris was problematic | Migrate current records, but historical data may not be migrated | Has not performed a Millennium migration, so there could be some surprises. |
| | | | | "Polaris will not convert outstanding purchase orders or invoices, as our architecture is very different." - Page 3.39; The p. 1.48 data migration section notes acquisitions. Based on the data structure of Millennium, the Order Records will be an issue during migration. | | |
| Performance in other locations of | 10 | Not scored (round 1) | Not scored (round 1) | Not scored (round 1) | Not scored (round 1) | Not scored (round 1) |

| Evaluation Criteria: Round 1 | Points Possible | Equinox | Innovative Interfaces | POLARIS | SirsiDynix | VTLS |
|---|---|---|---|---|---|---|
| **Vendor and of systems similar to those proposed** | | | | | | |
| Discussion: scoring will be completed after interviews with customers using the ILS and if they were running the ILS in the configuration proposed by the vendor. | | | | | | |
| **Future development and ongoing development of consortia features. Ability to contribute to development and the capacity of the system to support growth.** | 10 | 10 | 2 | 1 | 5 | 8 |
| | | Equinox sells development, they included forms for contributing to development. | Answers were brief, and did not elaborate on the enhancement process. | Did not respond to table 2.9-2 about custom development. Could be revised once more information is found. | Expected answers from a proprietary vendor. | VTLS has worked with customers recently to create numerous new features that become available to all customers of Virtua. |

| Evaluation Criteria: Round 1 | Points Possible | Equinox | Innovative Interfaces | POLARIS | SirsiDynix | VTLS |
|---|---|---|---|---|---|---|
| **Provision, capabilities, and costs of software to load, store, and output in applicable MARC formats bibliographic and authority records, and machine-readable patron, loan, and other records to/from SWAN's system** | **10** | **8** | **6** | **6** | **8** | **10** |
| All are RDA compliant, all make an accommodation for FRBR, but VTLS is fully FRBR compliant. | | | | | | |
| | | | | | | |
| **Suitability, performance, capacity, and growth path of proposed system hardware and software platforms and telecommunications systems, including the results of applicable benchmark tests, as described in *Section 6.10 & 6.11*** | **6** | **6** | **5** | **5** | **5** | **5** |
| | | | | | | |
| **Vendor's hardware and software maintenance** | **5** | **4** | **1** | **5** | **3** | **5** |

| Evaluation Criteria: Round 1 | Points Possible | Equinox | Innovative Interfaces | POLARIS | SirsiDynix | VTLS |
|---|---|---|---|---|---|---|
| **services and software support services** | | | | | | |
| | | Ranked 4 of 5 | Ranked 1 of 5 | Ranked 5 of 5 | Ranked 3 of 5 | Ranked 5 of 5 |
| **Significance of deviations of proposal from the system requirements and instructions for format and content of the proposal** | **4** | **Not scored in Round 1** | **Not scored in Round 1** | **Not scored in Round 1** | **Not scored in Round 1** | **Not scored in Round 1** |
| | | | | | | |
| **Vendor's overall experience in the library automation industry** | 4 | 3 | 4 | 4 | 4 | 4 |
| | | Not as long in the industry | | | | |
| **Vendor's financial stability** | **3** | **3** | **3** | **3** | **3** | **3** |
| | | | | | | |
| **Vendor's company organization and staffing** | **3** | **3** | **3** | **3** | **3** | **3** |
| | | | | | | |
| **Sum Total** | **200** | **142** | **110** | **111** | **150** | **129** |

## Formation of Task Force Groups (September)

The process for evaluating the ILS software as recommended by the SWAN strategic plan, the ILS Committee, and RMG Consulting included tapping into the expertise of the SWAN libraries. The ILS Committee determined seven groups (called Task Force Groups) would be needed to assist with evaluating the ILS software.

Volunteers from SWAN member libraries interested in participating on a Task Force submitted self-nominations to the ILS Committee. Self-nominations included a statement of interest, noting their background and qualifications, and a selection of two task force groups as first and second choice. The self-nomination process also sought out those interested in chairing the task force group.

The SWAN ILS Committee reviewed the self-nominations. Volunteers were finalized through ensuring the SWAN library sizes were represented, various service areas within the library were represented, and that as many libraries as possible were included. Task force group participant sizes were arranged around high interest groups (OPAC and circulation), and where other groups were smaller, some individuals were sought out to expand participation or to chair a group. In many cases, the ILS Committee was able to accommodate all nominations for a particular task force. Groups began meeting in September.

Each task force was assigned the following:

1. Create questions for the ILS vendors invited to demonstrate software

2. Read pertinent parts of the vendor proposals

3. Attend ILS demonstration sessions over the scheduled six days

4. For each of the three vendors, submit a written report to the ILS Committee covering the following:

    a. Rank of vendors on the basis of functionality

    b. List of follow up questions for the vendor

    c. List of Questions for Libraries using this Vendor

    d. Problems or Concerns with the proposed Vendor's ILS

    e. List of Desired Changes to the proposed ILS

    f. If we chose this vendor, how will it impact any current SWAN practices, rules, procedures
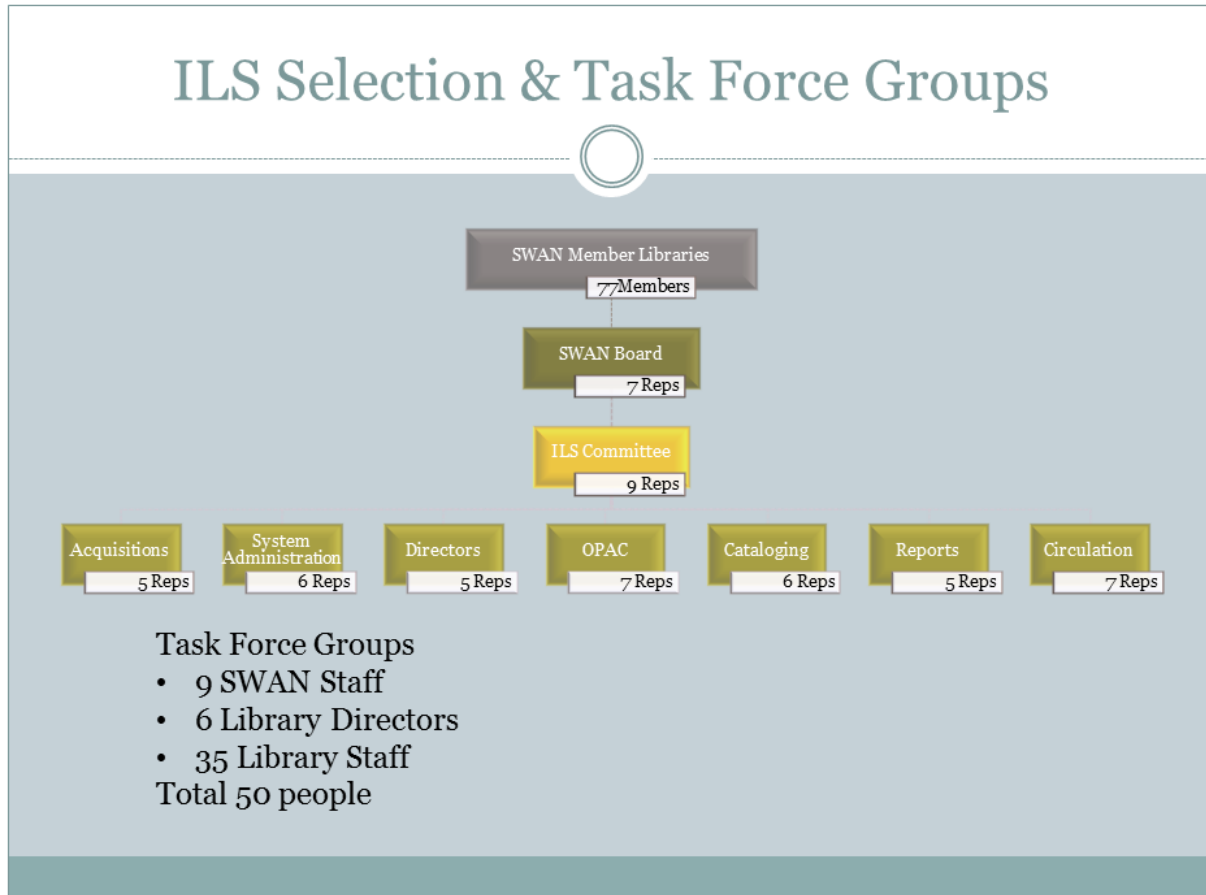
## On-Site Software Demos (October)

The three vendors with the highest scores were invited to Burr Ridge to perform software demonstrations. All SWAN libraries were invited to attend, with a requirement to register in advance and limit attendees from a library to two staff per session to allow for as many attendees as possible.

Questions from the seven Task Force groups were sent to the vendors in advance of the demonstrations, with instructions that if questions were not answered during the demonstrations, the chair of each task force would make certain to have the vendor stop and answer them.

Sessions were repeated within the twodays and at different hours so as to allow as many library staff to attend as possible, if interest and time allowed.  We have included the memo detailing the demos in Appendix B.

| Dates | Vendor | Vendor Staff |
|---|---|---|
| October 3 & 4 | SirsiDynix | Rick Branham, VP Global Accounts and Alliances Roslyn Dean, Demo Team Manager Andrea Downing, Product Specialist |

| | | Zaunarda Causey, Central Region Sales Director |
| | | Jeff Myers, Field Sales Representative |
| October 7 & 8 | Equinox | Rob Herrmann, Director of Sales |
| | | Shae Tetterton, Senior Project Manager |
| October 10 & 11 | VTLS | Dr. Vinod Chachra, President and CEO |
| | | Cece Yourshaw, VP, Operations |
| | | Mary Beth Holm, Customer Support Manager |
| | | Samantha Cunning, Customer Support Systems Librarian |

This was an enormous endeavor for SWAN staff and libraries, particularly the Task Force representatives who committed to attending each of the six days.

**Streaming of Demos**
SWAN provided live Web-streaming for the software demonstrations held in the Main Meeting room. We were technologically unable to stream the other sessions. All of the sessions streamed were recorded and archived, and can be found here: http://support.swanlibraries.net/content/demo-live-web-streaming.

**Feedback from On-Site Demos**
Each session included a paper feedback form and online feedback for library staff attending.

## Conclusions Drawn from the Software Demonstrations
All three vendors did a wonderful job addressing Task Force questions that were sent in advance. The demonstrations were hardly "promos" and were extremely valuable.

- VTLS, although relatively unknown, surprised and intrigued many attendees.
- SirsiDynix brought in the most staff, as would be expected, but also made sure to bring staff that had Millennium experience so that questions could be better understood and more easily answered.
- Equinox provided a good overview of the Evergreen ILS, but it became clear after the Task Force group reports were submitted that Evergreen currently lacked many areas of functionality that SWAN libraries expect.

## Task Force Reports
Below is a summary of the rankings from the seven task force groups. The ILS Committee reviewed the reports of the Task Force groups on November 7 & 8, 2013.

| Task Force | #1 | #2 | #3 |
|---|---|---|---|
| **Acquisitions & Serials** | VTLS | SirsiDynix | Equinox |
| **Cataloging and e-Content Task Force** | SirsiDynix | VTLS | Equinox |
| **Circulation** | SirsiDynix | VTLS | Equinox |
| **Directors** | VTLS | SirsiDynix | Equinox |
| **OPAC/Discovery** | VTLS | SirsiDynix | Equinox |
| **Reports** | SirsiDynix | VTLS | Equinox |
| **System Administration** | SirsiDynix | VTLS | Equinox |

Several groups noted during discussion and recommendation that the separation between SirsiDynix and VTLS was not significant. A few even noted that the vote was very close (e.g. 4 votes for SirsiDynix and 3 votes for VTLS).  All groups, however, did not believe Evergreen as demonstrated in its current version was a viable solution for SWAN.

The fully-compiled report from the seven Task Force groups is [available online](#).

At the conclusion of the November 8th meeting, the Committee decided not to issue an RBFO to Equinox. This was based on the recommendation from the seven Task Force groups that Evergreen was not a viable option for SWAN at this time. Equinox's proposal would be scored in the Round 2, as per the RFP process.

## Customer Interviews (November)

Interviews with the following customers were conducted on November 7 & 8, 2013 as part of the ongoing RFP process. Customers contacted were based on references provided by the vendor proposals to the SWAN RFP.

| Proposer | Customer | Notes |
|---|---|---|
| SirsiDynix | CCS | Illinois consortium, 23 libraries |
|  | RSA | Illinois LLSAP affiliated with RAILS, 260 libraries |
| Equinox | SCLENDS | South Carolina consortium |
|  | C/W MARS | Massachusetts consortium, 145 separate institutions, 169 locations |
| VTLS | RERO | Swiss consortium, 227 libraries |
|  | Queens Library | Public library, 18 million annual circ, 64 branches |

An informal interview was conducted with Paul Mills, Library Director of Fountaindale Library District, and former director of the PrairieCat consortia, which migrated from SirsiDynix to III.

### Conclusions from Customer Interviews

- **RERO**: the 227 library consortia was formed from six systems coming together, and selected Virtua based on four of the systems already running Virtua. No inter-library loan took place between the six systems on Virtua, as they retained custom software for managing requests between the systems.

- **Queens:** probably the most radical approach to providing services within a library we interviewed. In many ways Queens has found a great partner with VTLS as they can build ILS functions that integrate with RFID, products from the enterprise company SAP, and a integration with the Drupal content management system website. Our concerns about the Virtua staff client were not sufficiently answered, mostly because Queens staff use RFID to check-in and check-out 99% of all items, using a completely different RFID software interface.
- **CCS & RSA:** very satisfied with the Symphony ILS and SirsiDynix as a vendor at this point in time. If there were concerns about the company, they have largely been resolved and the tough period of ownership, leadership and new company staff are behind. Both RSA and CCS recently renewed contracts with SirsiDynix, and are either in the beginning stages of implementing eResource Central and/or utilizing the new Enterprise OPAC.
- **SCLENDS & C/W MARS:** the open-source community surrounding Evergreen has brought enormous functionality to Evergreen. The community however might move slower than some libraries like the King County Library System would prefer. SCLENDS is hosted by Equinox, which was noted by Equinox as the best way to ensure Evergreen performance. However, the SCLENDS OPAC on Evergreen was incredibly slow, which SCLENDS staff said should have been resolved and was due to one of its member libraries creating some custom search capabilities. The ILS Committee noted that the Evergreen OPAC (TPAC) was slow in many instances during research.

## RBFO Issued (November)

SWAN issued  individualized Requests for Best & Final Offer (RBFOs) to SirsiDynix and VTLS on November 20, 2013. The documents issued included:

- Follow-up questions from the Task Force group reports & ILS Committee, based on issues that were still unclear or unresolved
- Cost Configuration tables from the RFP
- New Cost Configurations for adding new libraries
- Additional questions pertaining to SaaS, Hosting, and On-Premise arrangements for the proposed hardware for production, test, and discovery configurations

SWAN received Best and Final Offers (BAFOs) from SirsiDynix and VTLS.

### Six ILS Configurations

As part of the RBFO process, the ILS Committee needed to determine which hardware and licensing arrangement to recommend to the SWAN Board and libraries. There were six configurations to consider:

| RFP & BAFO Configuration | Description |
|---|---|
| 1 | Production on-premise: purchase hardware from vendor, run in SWAN's datacenter |
| 2 | Test server on-premise |
| 3 | Production SaaS: subscription model where the ILS is in the vendor hosting facility or cloud environment |

| 4 | Test server SaaS |
|---|---|
| 5 | Production Software-only: purchase only licensing from vendor, SWAN provides hardware |
| 6 | Test server Software-only |

The SWAN RFP and the RBFO were designed to determine not only the cost of each arrangement, but to get full answers on a number of areas of SaaS and colocation hosting. The ILS Committee created a sub-committee to review the RFP proposal responses and the BAFO responses and make a recommendation. What follows is the recommendation from the subcommittee.

## Software Hosting Solutions ILS Sub-Committee

The ILS Committee directed co-chair Aaron Skog to arrange a sub-committee to recommend a solution for SWAN within the cost quotations and answers received in the BAFO. The Software Hosting Solutions ILS Committee recommendation is as follows.

**Sub-Committee Representatives:**

Steven Schlewitt, SWAN IT Manager            Marcin Truty, Oak Lawn IT Manager

Wesley Smith, RAILS IT Manager               Rudy Host, RAILS Network Administrator

Kate Boyle, SWAN Member Services Manager     Dave Pacin, SWAN Support Specialist

Ahren Sievers, Elmwood Park Technology Librarian (remote attendance)

Paul Mills, Fountaindale Public Library District (unable to attend)

**Meeting Summary**

The committee met with the intention of primarily discussing the advantages and disadvantages of two ILS configuration options, **On Premise**, and **Hosted** (by the vendor). Then, after forming the conclusion, the committee decided which ILS would be most suited for the preferred configuration.

The primary **Software as a Service** advantages discussed were the flexibility in SWAN's location mobility, the capacity for expansion to support member growth, and the peace of mind from external support. However, the external support also proved to be a disadvantage, as external support can prove unreliable, and present multiple points of failure when one external support contract relies on another. More significantly, the SaaS solution depends upon a subscription model. After five years of running the next ILS, if SWAN decides to move away from the SaaS model, there will be nothing to show for it.

As for the **On Premise** solution, the greatest advantages were found in the virtually non-existent cost of RAILS technical support, which would provide a network infrastructure, backup, and hardware configuration support. Additionally, RAILS would provide greater control of system and network configuration in such a way that could more appropriately suit SWAN's member needs. Working against this solution were the high cost of initial implementation and the potential for RAILS support to be overextended, while not within a binding service level contract.

**Sub-Committee Recommendation**

The Software Hosting Solutions ILS Sub-Committee came to the conclusion that an **On-Premise** software solution would be the optimal configuration for the SWAN Consortium. The committee had the preference for the VTLS Virtua ILS in this regard, although SirsiDynix's Symphony could also be implemented to satisfaction.

This conclusion was formed on the basis that SWAN would observe the greatest cost savings, experience comparable levels of service, and hold greater control of their systems through an on premise solution, mostly due to the flexibility of VTLS's client-heavy performance orientation (as opposed to server-heavy performance). While SirsiDynix's ILS was determined to be capable of a satisfactory performance on premise as well, the high initial cost to implement the system would result in a much longer realization of savings. In addition, it was feared that SirsiDynix's configuration would require greater hardware maintenance costs in the long-term, as their ILS is less "predictable" in its evolving hardware requirements. [**Note: we later learned that SirsiDynix Symphony could run on SWAN's existing virtualized VMware environment with minimal hardware upgrades.**]

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### Webinars Conducted (December)

As part of the RBFO process, the ILS Committee conducted webinars with SirsiDynix and VTLS in the following areas, to help resolve some unanswered questions.

1. Demonstration of Web-based staff client: any alpha or beta versions
2. In-depth overview of the holds processing: resource sharing functionality

### Conclusions Drawn from RBFO Webinars

- VTLS would have to develop consortia-level resource sharing features, and the cost and process to determine these features would have to be clarified prior to the final scoring
- VTLS is developing a Web-based client with a high-degree of customer involvement, utilizing collaborative techniques online (myBalsamiq); SWAN as a customer would have a role in creating this new client
- SirsiDynix Symphony is a very mature ILS with a lot of resource sharing settings and configurations which could be tuned in a variety of ways if the RAILS delivery were to require modification
- BLUEcloud is a platform on which SirsiDynix will deliver many new interfaces and services for libraries. The staff cataloging module will be released in the first quarter of 2014, but it can run in parallel with the Symphony Workflows client. SWAN could transition to the BLUEcloud staff client when we determine it is ready for use.

The presentations for the webinars are available online in the SWAN Member's Only section of the website under the RBFO section, or are linked to in the summary above.

## Request for Clarifications Issued (January)

The SWAN ILS Committee met on January 8th to begin round two scoring of SirsiDynix and VTLS. After the meeting, questions resulting from oneday of discussion based on the BAFOs were issued to

SirsiDynix and VTLS. The "request for clarifications" document, or RFC, was received on January 15th and reviewed during the final Round 2 scoring on January 17th.

## Library Customers Interviewed (January)

**SirsiDynix Symphony**

1. Gary Christopherson, Circulation Manager, Algonquin Area Public Library District (CCS member library) Circulation & Holds

**Conclusion:** Algonquin, in partnering with CCS and using Symphony, was able to achieve a significant amount of automation and self-service options for its library. Integration with Comprise, Envisionware, and RFID was completed with no significant issues reported.

**VTLS Virtua**

1. Marilyn Guy, Director of Operations, Vaughan Public Libraries, Ontario
2. Mary Sakaluk, Manager of Digital Technology Infrastructure, Hamilton Public Library

Conclusion: Vaughan is a single library system with seven locations running on Virtua for the last 10 years. Vaughan has been happy with the functionality of Virtua, but is not using EDI due to issues with its vendor not accommodating the library's desire to use EDI.

Hamilton went live on Virtua in November 2013. Hamilton has integrated with many 3rd party applications:

- BiblioCommons OPAC (in use with Horizon ILS, prior to VTLS)
- MKSort AMH sorter
- Bibliotheca self-check
- Comprise Smart Pay & Smart Money Manager, SAM
- OverDrive
- iTiva telephony, automated patron phone calls
- Freegal
- Hoopla
- Kit Keeper
- Unique Management Services
- EDI with Virtua Acquisitions (Midwest tape noted)

Hamilton also makes use of complex routing of materials between its three branches, using floating collections within Virtua. Hamilton staff were initially concerned about the Virtua staff client, having already been using a GUI staff client with Horizon, and that there would be "too many screens, too much clicking." But eventually, many staff learned to love the right-click/content menu capabilities of Virtua. Virtua also utilizes many key commands to navigate and perform tasks.

## Scoring Round 2 (January)

The ILS Committee met on January 8 and again on January 17, 2014 with Mr. McGee, to conduct the second round of scoring.

- • Scoring in the 16 criteria was completed with unanimous consensus by the ILS Committee
- • Final totals were not tabulated or revealed until the end of the second day of scoring: this avoided any favoritism or "push" to score a particular proposal over another proposal

Based on the outcome of the Task Force Groups findings, the ILS Committee eliminated Equinox **Evergreen** from the round 2 scoring based on the *RFP Section 1.3.29* "Strongly negative findings or judgments on the basis of any one of the above criteria may result in elimination of a given proposal from further consideration."  The specific criteria used for elimination was *Applications functions & Capabilities of Proposed Software*.

## Round 2 Points

| | 200 POINTS MAXIMUM | | | |
|---|---|---|---|---|
| | 150 | 177 | 129 | 171 |
| | SirsiDynix: Round 1 | SirsiDynix: Round 2 | VTLS: Round 1 | VTLS: Round 2 |
| Round 2 Points | 150 | 177 | 129 | 171 |
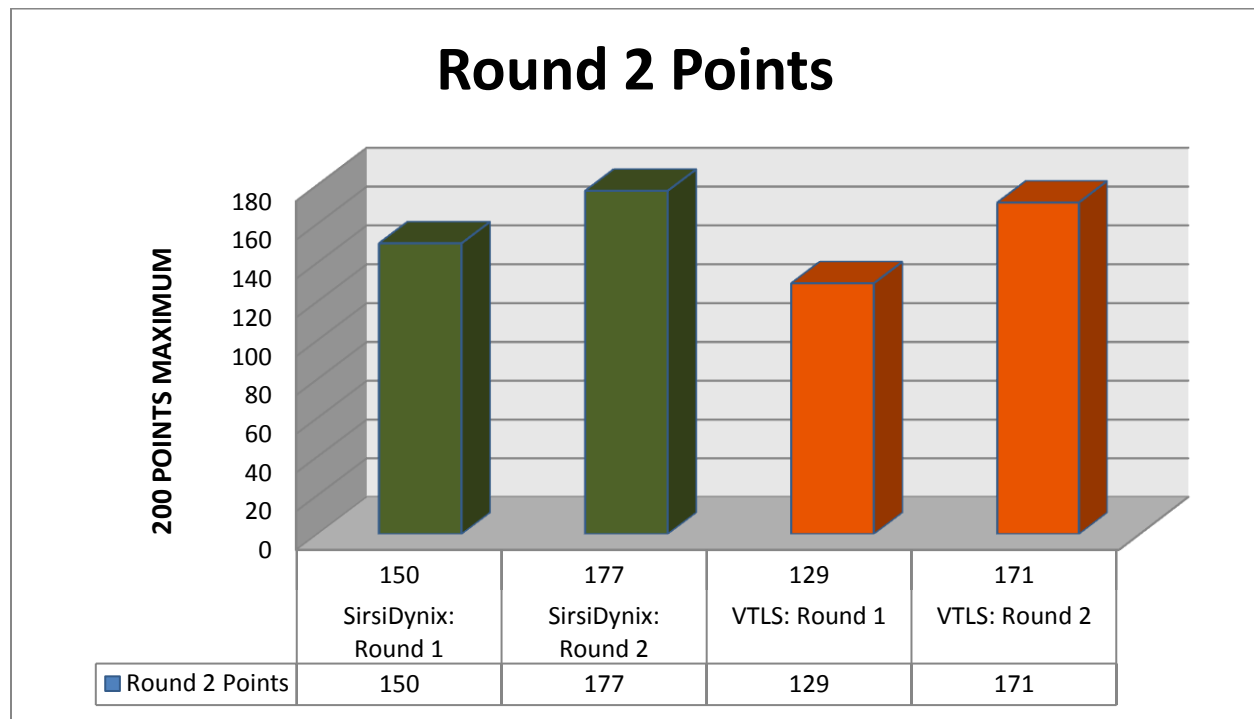
### Cost Analysis

RMG provided a cost analysis based on the BAFOs and Request for Clarifications (RFC). Additional cost analysis was conducted independently by co-chair Aaron Skog, to include telephony, and presented for discussion. Below are costs quoted based upon the RFC responses to the following configurations.

| RFP & BAFO Configuration | Description |
|---|---|
| 1 | Production on-premise: purchase hardware from vendor, run in SWAN's datacenter |
| 2 | Test server on-premise |
| 3 | Production SaaS: subscription model where the ILS is in the vendor hosting facility or cloud environment |

| 4 | Test server SaaS |
| 5 | Production Software-only: purchase only licensing from vendor, SWAN provides hardware |
| 6 | Test server Software-only |

| 5 Year Cost Totals | SirsiDynix RFC | VTLS RFC | Notes |
|---|---|---|---|
| Config #1: On-Premise Production, 5 yr | 1,291,226 | 1,317,142 | *VTLS year 1 maint included in license cost. VTLS applied a 4.5% maint increase ea year for Virtua, 4.0% for Chamo. SirsiDynix did not apply a % increase.* |
| Config #2: On-Premise Test, 5 yr | 110,000 | - | |
| Other cost: Telephony | included | 97,034 | *VTLS iTiva telephony (one-time $72,700 + $24,334): see BAFO p. 47* |
| **5-Year Cost Totals On-Premise** | **1,401,226** | **1,414,176** | ***Nearly even for On-Premise*** |
| Quoted Cost as % of lowest quoted 5 yr | 100% | 101% | |
| | (12,950) | 12,950 | |
| Config #5: Software-only Production, 5 yr | 1,089,830 | 1,259,899 | |
| Config #6: Software-only Test, 5 yr | 110,000 | - | |
| Other | | 97,034 | *iTiva telephony (one-time $72,700 + $24,334): see BAFO p. 47* |
| **5-Year Cost Totals Software-Only** | **1,199,830** | **1,356,933** | ***SirsiDynix lower for Software-Only*** |
| | 100% | 113% | |
| | (157,103) | | |

| Ongoing Maintenance Costs: On-Premise | SirsiDynix RFC | VTLS RFC | |
|---|---|---|---|
| Config #1: Total System Maintenance On-Premise Production, 1 yr | 206,224 | 118,241 | *5-year maint is $505,858 according to VTLS, which applies a 4.0% increase per year, compounding the increase.* |
| Config #2: Total System Maint On-Premise Test Server, 1 yr | 20,000 | - | *VTLS has NO COST* |
| Other | | 24,334 | *iTiva telephony annual* |
| **Ongoing Maint, Year 1 On-Premise** | **$ 226,224** | **$ 142,575** | ***VTLS lower On-Premise*** |
| | 159% | 100% | |
| | | *(83,649)* | |

| Ongoing Maintenance Costs: Software-Only | SirsiDynix RFC | VTLS RFC | |
|---|---|---|---|
| Config #5: Total System Maintenance On-Premise Production, 1 yr | 185,675 | 118,241 | |
| Config #6: Total System Maint On-Premise Test Server, 1 yr | 20,000 | - | *VTLS has NO COST for TestServer in Vmware server arrangement.* |
| Other | | 24,334 | *iTiva telephony annual maint.* |
| **Ongoing Maint, Year 1 Software-Only** | **205,675** | **142,575** | ***VTLS lower Software-Only*** |
| | 144% | 100% | |
| | | *(63,100)* | |

### Round 2 Scoring Details

Details on the round two scoring are included below. The 16 criteria were discussed during the two-day scoring period. The Committee agreed to slightly revise some scoring methodology within the 16 criteria based on what was learned since the Round one scoring. Refer to Appendix A for an overview of the criteria specified in the SWAN RFP.

| Evaluation Criteria: Round 2 | Points Possible | SirsiDynix: Round 1 | SirsiDynix: Round 2 | VTLS: Round 1 | VTLS: Round 2 |
|---|---|---|---|---|---|
| **Applications functions and capabilities of proposed software [Six areas of functionality below, scored ]** | **30** | **28** | **27** | **20** | **26** |
| Cataloging | 5 | 5 | 5 | 4 | 4 |
| | | clear screens, staff friendly; FRBR not ready; RDA compliant | | granular, powerful; appearance is off-putting | item templates need to be fixed; VTLS will do free custom development |
| Acq & Serials | 5 | 4 | 4 | 5 | 5 |
| | | can customize MARC import within Acq process | | | Task force scored higher; Hamilton using EDIFact |
| Circulation | 5 | 5 | 5 | 1 | 4 |
| | | user friendly interface, good looking screens | Great mobile product. | a lot of granularity with loan rules; no linked patron feature; no images easily incorporated; missing a lot of things | VTLS will do free custom development to address concerns. User interface difficult. |
| Reports | 5 | 5 | 5 | 3 | 3 |

| Evaluation Criteria: Round 2 | Points Possible | SirsiDynix: Round 1 | SirsiDynix: Round 2 | VTLS: Round 1 | VTLS: Round 2 |
|---|---|---|---|---|---|
| | | a huge amount of reports to select; custom reports could be included in consulting hours to have for day-one reports at go-live | Unsure if BlueCloud Analytics will do everything promised, but Web Reporter was better than InfoStation. | InfoStation: hold stats, page lists. Any ad-hoc is done using Crystal Reports. Oracle can be queried. | Ad hoc reports would be big barrier for member libraries. |
| OPAC | 5 | 5 | 4 | 4 | 5 |
| | | based on proposal, it sounds good | keyword-only fuzzy logic is too fuzzy | loved the full implementation of FRBR; the UI was problematic but it seems strong | traditional index-based searching. Also Drupal integration. |
| Sys Admin | 5 | 4 | 4 | 3 | 5 |
| | | Has some nice backup capabilities; java-based client is not ideal | APIs are great. VPN would still be needed, at least until BLUEcloud. Cloud is less secure. | Staff client requires high specifications seemed high. | Profiler very granular and powerful. Also have APIs. |
| **Resource sharing functionality** | **30** | **21** | **27** | **12** | **27** |
| Holds: 5 points (first round), 7 points (2nd round) | 7 | 5 | 5 | 1 | 6 |
| | | very mature holds processing | Manual check-in to clear holdshelf. | Virtual requires mediating every hold request, which is a huge problem | Will do custom devel included. |

| Evaluation Criteria: Round 2 | Points Possible | SirsiDynix: Round 1 | SirsiDynix: Round 2 | VTLS: Round 1 | VTLS: Round 2 |
|---|---|---|---|---|---|
| E-Content, online subscriptions: 5 points (first round), 7 points (2nd round) | 7 | 5 | 7 | 3 | 5 |
| | | eResource Central, Single Sign-on, chart with vendors Section 3, p. 136, more vendors listed. | One-click sign-in and download is huge. | the answers from VTLS indicate 3M Cloud integration but the 856 tag solution remains a primary suggestion | Scoring reflects more points in 2nd round. |
| OPAC (5 points 1st round, 7 points 2nd round) | 7 | 4 | 7 | 1 | 7 |
| **Notes on ability to scope by library? Prioritize local library holdings?** | | Yes, logged in or by IP range | No new info. | System level: order same for all libraries | Yes, logged in or by IP range |
| NCIP NISO standard: Section 3, Table 2.1-3 Question 1.19.16 (1 point) | 1 | 1 | 1 | 1 | 1 |
| **Reciprocal Borrowing (5 points 1st round, 7 points 2nd round)** | **7** | **5** | **6** | **5** | **7** |
| | | Good granularity | | Good granularity | Better granularity than Symphony. (by item types, etc.) |
| ILL: interfacing with external systems (1 point) | 1 | 1 | 1 | 1 | 1 |

| Evaluation Criteria: Round 2 | Points Possible | SirsiDynix: Round 1 | SirsiDynix: Round 2 | VTLS: Round 1 | VTLS: Round 2 |
|---|---|---|---|---|---|
| **Overall suitability of the Vendor and proposed system to present & future needs of SWAN** | 24 | 19 | 20 | 17 | 14 |
| | | | The proposal from SirsiDynix addressed many of the current needs. | | VTLS is prepared to build or enhance Virtua functionality to meet current needs, however the absence of features noted for development will require a "gap analysis" within a migration. |
| **Quoted costs of proposal** | 20 | 15 | 19 | 13 | 20 |
| | | | BAFO/RFC cost adjustments factored in; BAFO costs not used. Based on on-premise server hardware incl. in costs. 3% higher than VTLS. | | BAFO/RFC cost adjustments factored in; BAFO costs not used. Based on on-premise server hardware incl. in costs. |

| Evaluation Criteria: Round 2 | Points Possible | SirsiDynix: Round 1 | SirsiDynix: Round 2 | VTLS: Round 1 | VTLS: Round 2 |
|---|---|---|---|---|---|
| **Costs to SWAN implied by the proposal** | **20** | **16** | **15** | **11** | **15** |
| Workstations 9 points (first round). 8 points workstations (2nd round). | 10 | 6 pts for workstations: no support Win2000 or Win8. Answer provided on thin clients is a concern. | 5 pts, adjusted to reflect new point totals. Sec 3 p. 195 for thin clients answer. | 9 pts for Workstations: recommend moving to better hardware, but overall supported. | 8 pts (note: 8 is maximum in 2nd round) |
| Peripherals (2 points) | 2 | 2 for peripherals: can support anything. | 2 | 1 for peripherals | 1 Not able to support all our peripherals |
| Staffing implications (9 points): keying in no-migrated data, retraining staff, etc. | 9 | 8 pts, staffing implications | 8 pts, training for staff. Java client will make it harder to adjust font size. | 2 schedule staff for tape backup. Staff-mediated holds: would have to pay for go-live development. | 6 pts, using VMware for backup is allowed, improving score. Development for holds is now included. |

| Evaluation Criteria: Round 2 | Points Possible | SirsiDynix: Round 1 | SirsiDynix: Round 2 | VTLS: Round 1 | VTLS: Round 2 |
|---|---|---|---|---|---|
| Licensing for virtualization: 1 point (added 2nd round) | 1 | | 1 | | 1 |
| **Vendor's proposed training for SWAN** | **11** | **10** | **10** | **11** | **11** |
| | | Thorough but not enough onsite in proposal | no new info | Very thorough | no new info |
| **Vendor's plan and ability for fulfilling proposal** | **10** | **10** | **10** | **7** | **10** |
| | | | | | On-site meeting overview of migration plan improved score. |
| Migration plan | | Migrate current records, but historical data may not be migrated | | Has not performed a Millennium migration, so there could be some surprises. | ISO standards: strong migration standards. On-site demos presented overview of migrations. RFC addressed new timeline and GAP analysis. |

| Evaluation Criteria: Round 2 | Points Possible | SirsiDynix: Round 1 | SirsiDynix: Round 2 | VTLS: Round 1 | VTLS: Round 2 |
|---|---|---|---|---|---|
| **Performance in other locations of Vendor and of systems similar to those proposed** | **10** | **Not scored (round 1)** | **10** | **Not scored (round 1)** | **6** |
| Discussion includes: interviews with customers using the ILS and if they were running the ILS in the configuration proposed by the vendor. | | | CCS & RSA consortia were interviewed by the committee spoke highly of the Symphony ILS and SirsiDynix. | | RERO is the only consortia interviewed, but it is the only consortia similar to SWAN running Virtua. |
| **Future development and ongoing development of consortia features. Ability to contribute to development and the capacity of the system to support growth.** | **10** | **5** | **7** | **8** | **8** |
| | | Expected answers from a proprietary vendor. | New information includes the Strategic Partners Program. Interviews with RSA as an "SPP" found this to be vital for consortia. SirsiDynix also has a consortia users group. | VTLS has worked with customers recently to create numerous new features that become available to all customers of Virtua. | VTLS has indicated in the BAFO they will work with SWAN to develop features and set priorities for features. |

| Evaluation Criteria: Round 2 | Points Possible | SirsiDynix: Round 1 | SirsiDynix: Round 2 | VTLS: Round 1 | VTLS: Round 2 |
|---|---|---|---|---|---|
| **Provision, capabilities, and costs of software to load, store, and output in applicable MARC formats bibliographic and authority records, and machine-readable patron, loan, and other records to/from SWAN's system** | **10** | **8** | **9** | **10** | **10** |
| | | | CCS interviewed noted that they can extract the bib database in a single file. RSA noted it took 20 min to compile and 2 hrs to export. RDA compliant is coming, p. 80 question #20, within BLUEcloud. Page 37 in the table notes RDA now, with some RDA enhancements coming. | | Queens & REFO noted 2 hours to get the data extracted. Fully RDA compliant within the BAFO. RDA within the VTLS BAFO response is compliant. |

| Evaluation Criteria: Round 2 | Points Possible | SirsiDynix: Round 1 | SirsiDynix: Round 2 | VTLS: Round 1 | VTLS: Round 2 |
|---|---|---|---|---|---|
| Suitability, performance, capacity, and growth path of proposed system hardware and software platforms and telecommunications systems, including the results of applicable benchmark tests, as described in Section 6.10 & 6.11 | 6 | 5 | 5 | 5 | 5 |
| | | | No change to score based on new information since the round 1 scoring. | | No change to score based on new information since the round 1 scoring. |
| Vendor's hardware and software maintenance services and software support services | 5 | 3 | 4 | 5 | 5 |
| | | Ranked 3 of 5 | Interviews indicated a higher score than before. | Ranked 5 of 5 | No change based on customers interviewed. |
| Significance of deviations of proposal from the system requirements and instructions for format and content of the proposal | 4 | Not scored in Round 1 | 4 | Not scored in Round 1 | 4 |
| Vendor's overall experience in the library automation industry | 4 | 4 | 4 | 4 | 4 |
| Vendor's financial stability | 3 | 3 | 3 | 3 | 3 |

| Evaluation Criteria: Round 2 | Points Possible | SirsiDynix: Round 1 | SirsiDynix: Round 2 | VTLS: Round 1 | VTLS: Round 2 |
|---|---|---|---|---|---|
| **Vendor's company organization and staffing** | **3** | **3** | **3** | **3** | **3** |
| | | | | | |
| **Sum Total** | **200** | **150** | **177** | **129** | **171** |

# Comparison of Final Proposals

The final round of scoring presented two viable solutions for SWAN, each with inherent strengths. Over the course of the ILS search and in developing in-depth relationships with each vendor, certain key attributes that each would bring to SWAN became readily apparent. Either choice would present SWAN with a variety of unique opportunities and challenges, often with the strength of one vendor being a limitation in the other.

**SirsiDynix**

The company continues to support two ILS, Horizon and Symphony after its 2006 merger (misconceptions abound in the library field that Horizon support has been "cut off"). Consortia customers could be found easily, with two affiliated with RAILS as LLSAP (MAGIC & RSA), and other independents nearby in the RAILS area (LINC & CCS). All spoke highly of SirsiDynix.

Symphony is a mature ILS, albeit older, but one could infer that it is flexible in its ability to adapt and endure within the ILS marketplace. The staff client "Workflows" will eventually have a competing Web-based client over the next two-years (2014-2015). The staff client transition for SWAN on Symphony could possibly resemble that experienced when moving from INNOPAC to Millennium: both interfaces remain functional and available to library staff, while BLUEcloud matures under SWAN's influence as a Strategic Preferred Partner until it is a viable solution for front-line and back-room staff.

In Illinois, there is some perception that SirsiDynix as a company is losing market share, and is perhaps supporting a "dying product." Our research found that SirsiDynix is dominant in the marketplace, acquiring more customers than any of the other "big three" ILS vendors (Polaris, Innovative, and SirsiDynix).

The proposal from SirsiDynix presents a conservative solution for the SWAN consortium, but it also represents forward thinking services which take advantage of cloud-based technology, SaaS where it is advantageous to SWAN (the OPAC web-traffic, BLUEcloud staff clients), and on-premise allows a hands-on management of the ILS data. The on-premise security of our consortia data was a concern for the System Administration Task Force group, so this hybrid solution of on-premise and cloud-based applications from SirsiDynix is an ideal solution for SWAN's future.

**VTLS**

VTLS is a smaller, software development-driven company with international focus. In regards to having a comparable consortia customer, it would be difficult to find one within VTLS. The Swiss consortia RERO, while large, was not fully utilizing the ILL capability of Virtua. One could view that SWAN would be a big fish in a small pond, building a relationship with VTLS to enhance its ILS and OpenSkies intiative, molding it to SWAN's needs. However, the Virtua functionality when examined at the distance of this selection process determined a list of nine features be required for development. VTLS included this development at no-cost within its final RFC pricing, but RMG and the ILS Committee strongly believes a "gap analysis" should be required as part of the process before arranging a final agreement with VTLS. This analysis would involve reviewing VTLS software against existing/desired consortia functionality.

SWAN would take steps to determine what requirement would be to create the enhancements, and update the project timeline. VTLS has proven that it can work within such an arrangement, as it has done so with Queens and Hong Kong Public Library.

The VTLS proposal of the Virtua ILS and Chamo OPAC could be operated solely in an on-premise arrangement, meaning all hardware could be housed in the datacenter SWAN chooses. VTLS provides hosting arrangements; however ,these are arranged with commercial colocation services. The Virtua staff client was very different from what member library staff are accustomed to using, so reaction to it was more critical, and it was noted that to perform tasks it could possibly involve more navigation to complete a transaction. Customers using Virtua did not report strongly negative training or transition to the Virtua client. Libraries using the acquisitions functions in the area of EDI are not as prevalent, so we were only able to check on a one reference, Hamilton Public Library in Ontario, whose staff did not find anything negative to report about EDI.

## Products Proposed

| Products | SirsiDynix | VTLS | Description |
|---|---|---|---|
| **ILS** | Symphony | Virtua | Integrated library system with all modules and features itemized on the cost forms. |
| **OPAC** | Enterprise | Chamo | Search and discovery interface |
| **Digital Asset** | Portfolio | not included | Digital asset management product |
| **Mobile app** | Bookmyne+ | MozGo | Customizable mobile app |
| **eBook** | eResource Central | Chamo APIs | eBook integration |
| **Social** | Social Library (Facebook app) | not included | Native Facebook application that provides features and functionality of Facebook |
| **Data Analysis** | BLUEcloud Analytics, which includes Web Reporter | InfoStation | Web-based reporting tool |
| **Telephony** | SVA (included in Configuration 1 Costs) | iTiva (extra cost, $72K one-time, $24K ongoing) | Automated phone notification to patrons |

| | | | |
|---|---|---|---|
| **Web-client** | Mobile Circ & staff client under development | under development | Staff access to web-based functions traditionally found in the client-based application of the ILS |
| **SMS** | included in SMS module | requires a third-party SMS gateway (Proposal Part 3: 1.7.1.3 table & p. 3 - 45) | Text messaging capability for notifying patrons |
| **Delinquent Accounts** | Interface included | Interface included | Integration with Unique Management Services |
| **SIP2 Unlimited** | Included | Included | Support for Standard Interchange Protocol version 2 for 3rd party integration |

## Final Recommendation

The ILS Committee felt that both VTLS and SirsiDynix presented compelling options. Both systems would be highly viable options for our member libraries. In the end, SirsiDynix scored slightly higher for the following reasons.

1. Symphony is ready "out of the box." SWAN would not have to spend much time with the vendor developing features just to get the product to the same level of functionality that we have now with Millennium.
2. Symphony ILS features are more mature and the product suite represents a "fast start" to the SWAN consortia in that it will have immediate "wins," such as:
   a. text messaging,
   b. mobile circulation and inventory with Mobile Circ,
   c. e-book integration managed intelligently for patrons and staff (no more loading MARC records with 856 tags)
3. Resource sharing is robust and will meet all of our expectations.
4. 3rd party integration with existing vendors is near 100% certain.
5. BLUEcloud is a compelling platform for future development.
6. SirsiDynix's Consortial Users Group and Strategic Partnership Program both allow SWAN opportunities to participate and have a voice in future product development. In addition, SirsiDynix's highly active consortial customers already ensure that products are designed with consortia in mind.
7. SirsiDynix is offering significant discounts to make their proposal highly competitive.

Note that costs were not a significant barrier in selection.

Therefore, the ILS Committee recommends that SWAN enter into negotiations with SirsiDynix for its next integrated library system.

# What Will SirsiDynix Mean to SWAN?

The ILS Committee found that SirsiDynix is a company that is leading the ILS market compared to other vendors. The April 2013 Library Journal article *Automation Marketplace 2013: The Rush to Innovate* noted *"In contradiction to perceptions that the company is losing market share, this year SirsiDynix outsold all its competitors. With new sales increasingly outside the United States, the SirsiDynix customer base will be increasingly international."*
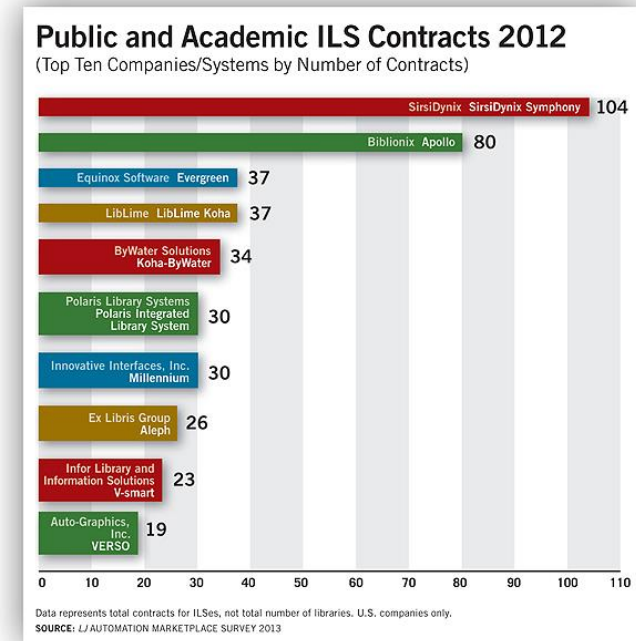


Public and Academic ILS Contracts 2012
(Top Ten Companies/Systems by Number of Contracts)

| Company / System | Contracts |
| --- | --- |
| SirsiDynix SirsiDynix Symphony | 104 |
| Biblionix Apollo | 80 |
| Equinox Software Evergreen | 37 |
| LibLime LibLime Koha | 37 |
| ByWater Solutions Koha-ByWater | 34 |
| Polaris Library Systems Polaris Integrated Library System | 30 |
| Innovative Interfaces, Inc. Millennium | 30 |
| Ex Libris Group Aleph | 26 |
| Infor Library and Information Solutions V-smart | 23 |
| Auto-Graphics, Inc. VERSO | 19 |

Data represents total contracts for ILSes, not total number of libraries. U.S. companies only.
SOURCE: *LJ* AUTOMATION MARKETPLACE SURVEY 2013



| TABLE 3 PERSONNEL ANALYSIS* | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| COMPANY | DEVELOPMENT | SUPPORT | SALES | ADMIN | OTHER | 2012 TOTAL | 2011 TOTAL | 2010 TOTAL |
| Auto-Graphics | 11 | 7 | 6 | 4 | 7 | 35 | 34 | 32 |
| Axiell | 55 | 53 | 30 | 29 | 31 | 198 | 226 | 223 |
| Baratz | 19 | 16 | 19 | 12 | 21 | 87 | | |
| Book Systems | 15 | 22 | 16 | 4 | 2 | 59 | 60 | 60 |
| ByWater Solutions | 3 | 12 | 2 | 4 | 1 | 13 | 13 | 6 |
| Capita (formerly Talis) | | | | | | 49 | 43 | 86 |
| Civica | 19 | 382 | 14 | 10 | | 425 | 410 | 400 |
| EOS International | 13 | 12 | 17 | 4 | 3 | 50 | 52 | 52 |
| Equinox Software | 4 | 6 | 3 | 5 | 2 | 20 | 21 | 22 |
| Ex Libris | 189 | 222 | 53 | 46 | 12 | 522 | 512 | 504 |
| Follett Software Co. | 78 | 151 | 81 | | 31 | 341 | 365 | 408 |
| Infor Library Solutions | 16 | 36 | 13 | 6 | | 71 | 71 | 71 |
| InfoVision Technology | 5 | 3 | 2 | 0 | | 10 | 13 | 10 |
| Innovative Interfaces | 89 | 161 | 53 | 31 | 7 | 341 | 311 | 307 |
| Keystone Systems | 5 | 5 | 3 | 2 | 1 | 16 | 17 | 17 |
| L4U Library Software | 5 | 5 | 4 | 3 | 2 | 19 | 19 | 20 |
| LibLime (div. of PTFS) | 5 | 16 | 3 | 8 | 8 | 155 | 155 | 155 |
| The Library Corporation | 39 | 91 | 28 | 13 | 28 | 199 | 199 | 199 |
| OCLC | | | | | | 1250 | 1211 | 1200 |
| Polaris Library Systems | 27 | 46 | 18 | 2 | | 93 | 86 | 78 |
| Serials Solutions | 131 | 51 | 51 | 3 | 20 | 256 | 237 | 208 |
| SirsiDynix | 86 | 168 | 52 | 22 | 41 | 369 | 380 | 385 |
| VTLS | 29 | 37 | 9 | 7 | 4 | 86 | 110 | 96 |

*Numbers represented here are as reported by the vendors; blank spaces indicate that no data was provided.
SOURCE: *LJ* AUTOMATION MARKETPLACE SURVEY 2013

Sales indicate SirsiDynix and its solutions present a viable option to many libraries. Customers SWAN interviewed indicated that the company is strong and moved past its merger issues. Concerns that affected other customers in the past, such as undersized Sun/Oracle servers, were not found during our research.

The 2013 LJ Automation Marketplace Survey shows that SirsiDynix is within the top three for the number of software developers employed among that major ILS vendors. The RSA consortia has served as a "Strategic Partner Program" for beta testing the Enterprise and eResource Central software, and through that process many tangible improvements have been delivered to assist with consortia level system administration and interaction with consortia data. RSA is also testing the BLUEcloud Analytics product.

# What Does BLUEcloud Mean?

BLUE stands for **B**est **L**ibrary **U**ser **E**xperience and is a suite of tools SirsiDynix is presently developing and releasing. BLUEcloud is a 100% cloud-based client (application, logic, rules, etc. all live in the cloud). The BLUEcloud Cataloging Client is scheduled for release Q1 2014 with other modules to follow.

| BLUEcloud Module/Function | Targeted Delivery Date |
| --- | --- |
| **eResource Central** | Available now |
| **Mobile Circ** | Available now |
| **Universal Admin** | Available now |
| **Analytics** | Q1 2014 |
| **Cataloging** | Q1 2014 |
| **Marketplace** | Q2 2014 |
| **BookMyne 4** | Q1 2014 |
| **(See BAFO p. 65)** | |

## SirsiDynix Cost

Based on the preliminary agreement received from SirsiDynix, the software-only arrangement would have an annual maintenance with <u>no percentage increase for 5 years and represent a 41% savings to SWAN over our current annual maintenance with III.</u>

| Component | Year 1 | Year 2 |
| --- | --- | --- |
| SirsiDynix Software | 187,130 | 185,675 |
| SirsiDynix Test Software | 30,000 | 20,000 |
| Platinum Services | incl | |
| Enterprise | incl | |
| Portfolio | incl | |
| Enriched Content | incl | |
| Telemessaging | incl | |
| Authority Setup Service | incl | |
| Additional Services Mgmt | incl | |
| Authority Ongoing Update Service | incl | |
| Customer Consulting | incl | |
| Customer Project Management | incl | |
| Custom Training | 70,000 | |
| **Total** | **287,130** | **205,675** |

| Services | Year 1 | Year 2 |
| --- | --- | --- |
| Data Migration | 50,000 | |
| Installation | 30,790 | |
| Consulting | 9,210 | |

| | | |
|---|---|---|
| **Total** | **90,000** | |

| | | |
|---|---|---|
| **SUM TOTAL** | **377,130** | **205,675** |

| | | |
|---|---|---|
| From RFC quote | | 205,675 |
| **Initial Term of Maintenance & SaaS Services** | | Five (5) Years |

| | | |
|---|---|---|
| **Initial Term Annual Price Increase Cap for SirsiDynix:** | 0% annual price increase cap until Term renewal | |

## Component

| | Year 1 | Year 2 |
|---|---|---|
| SirsiDynix Software | 187,130 | 185,675 |
| SirsiDynix Test Software | 30,000 | 20,000 |
| Platinum Services | incl | |
| Enterprise | incl | |
| Portfolio | incl | |
| Enriched Content | incl | |
| Telemessaging | incl | |
| Authority Setup Service | incl | |
| Additional Services Mgmt | incl | |
| Authority Ongoing Update Service | incl | |
| Customer Consulting | incl | |
| Customer Project Management | incl | |
| Custom Training | 70,000 | |
| **Total** | **287,130** | **205,675** |

## Services

| | Year 1 | Year 2 |
|---|---|---|
| Data Migration | 50,000 | |
| Installation | 30,790 | |
| Consulting | 9,210 | |
| **Total** | | |

|  | | |
|---|---|---|
| | **90,000** | |
| **SUM TOTAL** | **377,130** | **205,675** |
| From RFC quote | | 205,675 |
| **Initial Term of Maintenance & SaaS Services** | | Five (5) Years |
| **Initial Term Annual Price Increase Cap for SirsiDynix:** | | 0% annual price increase cap until Term renewal |
| Current ILS Maintenance | 279,748 | |
| Application Management Service | 69,600 | |
| **Total Current Annual Maintenance** | **349,348** | |
| SirsiDynix Annual Maintenance | 205,675 | |
| **Savings** | **143,673** | **41%** |

## Appendix A: RFP Excerpt, SECTION 1.3: GENERAL INSTRUCTIONS TO VENDORS

1.3.22   SWAN will select as the successful Proposer the Vendor whose proposal SWAN determines best meets the needs of SWAN, based on the evaluation criteria set forth herein.

The determination of the successful proposal will be based upon information supplied by the Vendor in response to this RFP and upon other information that will be obtained by SWAN as it deems necessary. The lowest-cost Proposer may not be determined to be the lowest responsible Proposer when all factors of evaluation of proposals have been considered. However, the total quoted price is an important factor in determination of the selected proposal.

1.3.23   During the first phase of the evaluation process, SWAN intends to evaluate all proposals according to the criteria listed in ¶1.3.29, including the possible elimination of any given proposal because of strongly negative findings or judgments on the basis of any one of the criteria.

1.3.24   Proposals not eliminated during this first phase of the evaluation process will be further evaluated during the second phase in which SWAN may submit written questions and requests for clarifications, further information, and better pricing to some or all proposers; and require written answers to such questions and requests; and may conduct site visits to and/or telephone interviews of libraries using systems provided by proposers.

During this second phase of the evaluation process SWAN may select two or more proposals and require the respective proposers at their expense to visit SWAN to make presentations on their systems and proposals, to answer questions posed by SWAN, and to enter competitive negotiations with SWAN.

SWAN intends to complete the second phase of the evaluation process by applying again the evaluation criteria listed in ¶1.3.29 to all proposals not eliminated during the first phase of the evaluation process.

1.3.25   The successful Proposer will be required to visit SWAN at its expense a second and possibly a third time to conduct negotiations and planning with SWAN. The dates specified in Section 1.2of the RFP have been reserved for these meetings.

1.3.26   In the event that a contract acceptable to SWAN cannot be executed with the top Proposer, SWAN may eliminate that Proposer from further consideration. SWAN will then proceed to conduct negotiations and planning sessions with the Proposer next preferred.  Such process will be continued until either an acceptable contract is executed or all proposals have been eliminated.

1.3.27   The SWAN ILS Committee shall assign a point value for each criterion to each proposal being evaluated; the determination of each point value shall be by consensus.

The successful proposal will be selected as a result of the fair application of evaluation criteria by the SWAN Board.

1.3.28   The SWAN ILS Committee shall be co-chaired by two individuals designated by the SWAN Board.

1.3.29   The following criteria shall be employed in the evaluation of proposals and the decision to award the contract to the successful Vendor. Each proposal will be scored independently.

| | |
|---|---|
| 1. Applications functions and capabilities of proposed software | 30 points |
| 2. Resource sharing functionality | 30 points |
| 3. Overall suitability of the Vendor and proposed system to present and future needs of SWAN | 24 points |
| 4. Quoted costs of proposal | 20 points |
| 5. Costs to SWAN implied by the proposal | 20 points |
| 6. Vendor's proposed training for SWAN | 11 points |
| 7. Vendor's plan and ability for fulfilling proposal | 10 points |
| 8. Performance in other locations of Vendor and of systems similar to those proposed | 10 points |
| 9. Future development and ongoing development of consortia features. Ability to contribute to development and the capacity of the system to support growth. | 10 points |
| 10. Provision, capabilities, and costs of software to load, store, and output in applicable MARC formats bibliographic and authority records, and machine-readable patron, loan, and other records to/from SWAN's system | 10 points |
| 11. Suitability, performance, capacity, and growth path of proposed system hardware and software platforms and telecommunications systems, including the results of applicable benchmark tests, as described in *Section 6.10 & 6.11* | 6 points |
| 12. Vendor's hardware and software maintenance services and software support services | 5 points |
| 13. Significance of deviations of proposal from the system requirements and instructions for format and content of the proposal | 4 points |
| 14. Vendor's overall experience in the library automation industry | 4 points |
| 15. Vendor's financial stability | 3 points |
| 16. Vendor's company organization and staffing | 3 points |
| *Total* | *200 Points* |

**Strongly negative findings or judgments on the basis of any one of the above criteria may result in elimination of a given proposal from further consideration.**

1.3.30   The SWAN ILS Committee will assign point values for each criterion to each proposal being evaluated according to the following guidelines:

| 0 = | Proposal is non-responsive or wholly inadequate; this could result in elimination of a given proposal from further consideration. |
|---|---|
| Highest Score = | Best proposal |
| Equal Score = | Two or more proposals may receive the same score when they are considered equally responsive. |

1.3.31   The evaluation process is designed to award the acquisition not necessarily to the Vendor of least cost, but rather to that Vendor with the best combination of attributes based upon the evaluation criteria.

The SWAN ILS Committee will compile the scores, which during the first phase of the evaluation process, as described by *¶1.3.23*, will be used to select two or more proposals for further evaluation during the second phase; and which during the second phase will be the basis for selecting the successful proposal.

Vendor is aware that comparison of Vendors' proposals can be a difficult process due to multiple variables including price, products, references, and recommendations. This process requires subjective assessment by SWAN of overall suitability and quality for SWAN's purposes. SWAN's use of evaluation criteria in no way alters SWAN's discretion in selecting a Vendor deemed by SWAN to be best suited to meet SWAN's need.

1.3.32   Negotiations for procurement of a system will be conducted by SWAN's Negotiating Team as described in Section 1.1.

## Appendix B: Vendor Demonstrations Memo

| | |
|---|---|
| **Date:** | **September 30, 2013** |
| **To:** | **SWAN Member Libraries** |
| **From:** | **Aaron Skog, Executive Director** |
| **Re:** | **Announcement to SWAN Libraries: Vendor Demonstrations** |

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# Announcement to SWAN Libraries

# Vendor Demonstrations

The schedule for the ILS Vendor Demonstrations has been set. Each of the three vendors will be onsite at the Burr Ridge building for two days. The days have been divided into specific sessions to demonstrate various service areas of the ILS. The schedule begins on the third page of this memo.

### Attending the demonstrations

The SWAN ILS Committee encourages every SWAN library to send staff to see demonstrations of the vendors' products. Please understand that parking is limited at the Burr Ridge office, so please consider carpooling when possible. There is also limited space in the various meeting rooms that will be used. **We suggest that each library send no more than 2 of its staff to any one session. You'll note that some sessions are repeated, in which case libraries may send up to 2 staff to EACH session.** Following this guideline will allow every library to participate in this very important process of selecting a new ILS vendor.

### Agenda for each demonstration session

Some vendor sessions will be attended by the respective ILS Task Force Members. The Task Force members are self-nominated staff from various member libraries and represent the various sizes of SWAN libraries. Their job is to provide the depth and breadth of questions related to current and future functionality of each service area (Circulation, Cataloging, Acquisitions, etc.). Task Force members have studied pertinent parts of the vendor proposals and are familiar with what each vendor is offering. Task Forces will forward their impressions and recommendations to the ILS Committee.

The agenda for each session is to allow the Task Force members the opportunity to get through their list of questions, and then open the session to questions from other attendees. *Questions from the Task Force and from everyone else attending are equally important and the goal is to provide time for both to take place.*

Comments from the Task Force as well as your comments will be presented to the ILS Committee, and those comments will assist the ILS Committee make a final recommendation to the SWAN Board.

## Live Streaming

SWAN will provide live Web-streaming for the software demonstrations in the Main Meeting room. We regret we won't be able to stream the other sessions. Details on the Web-streaming can be found here: http://support.swanlibraries.net/content/demo-live-web-streaming

## Tutorials & Videos

Some of the vendors have provided videos and tutorials. These will be posted in this SWAN webpage: http://support.swanlibraries.net/content/vendor-tutorials

## Read the Written Proposals

Proposals from Equinox, SirsiDynix, and VTLS are available online for you to review prior to the software demos. These are written responses to the SWAN RFP and may assist you with any questions you have: http://support.swanlibraries.net/content/proposals-swan-ils-rfp

Please go to L2 to register for sessions in your areas of interest. Links to L2 are provided in electronic versions of this memo. **We suggest that each library send no more than 2 of its staff to any one session. You'll note that some sessions are repeated, in which case libraries may send up to 2 staff to EACH session.**

### SirsiDynix Day 1: October 3, 2013

| Time | Meeting Room (max 95) | Room A (max 20) | Room B (max 35) | Computer Lab (max 15) |
|---|---|---|---|---|
| **9:00 – 10:00 AM** | General Overview: company, software, & BLUE Cloud Suite (repeated 7-8pm & Oct 4, 9-10am) | | | |
| **10:15 – 12:45** | Circulation, Holds Processing (repeated day 2) | 10:15- 12:15: Support Portal Mentor & Community Funded Services (repeated day 2) | Cataloging, Bibliographic & Authority Control | Reports (guided w/ instructor) |
| **1:00 – 2:00** | **LUNCH BREAK** | | | |
| **2:-30 – 5:00 PM** | OPAC, eResource Central (repeated day 2) | 2:30 -4:00: Mobile apps (staff & patrons) & Social Library (repeated day 2) | [Room not available 1:00 – 2:30]  3:00 -5:00: Reports: ILS & Analytics | Cataloging (guided w instructor) |
| **7:00 – 8:00 PM (optional)** | General Overview: company, software, & BLUE Cloud Suite (repeat of morning) | | | |

Please contact Brande Redfield brande.redfield@railslibraries.info or at 630-734-5164 if you have problems registering in L2.

Please go to L2 to register for sessions in your areas of interest. Links to L2 are provided in electronic versions of this memo. **We suggest that each library send no more than 2 of its staff to any one session. You'll note that some sessions are repeated, in which case libraries may send up to 2 staff to EACH session.**

### SirsiDynix Day 2: October 4, 2013

| Time | Meeting Room (max 95) | Room A (max 20) | Room B (max 35) | Computer Lab (max 15) |
|---|---|---|---|---|
| **9:00 – 10:00 AM** | General Overview: company, BLUE Cloud Suite (repeat of day | | | |

| | 1) | | | |
|---|---|---|---|---|
| **10:15 – 12:45** | OPAC, eResource Central (repeat from day 1) | 10:15- 12:15 Mobile apps (staff & patrons) & Social Library (repeat from day 1) | Acquisitions & Serials | Reports (guided w/ instructor) |
| **1:00 – 2:00** | **LUNCH BREAK** | | | |
| **2:30 – 5:00 PM** | Circulation, Holds Processing (repeat from day 1) | 2:30-4:00 Support Portal Mentor & Community Funded Services (repeat from day 1) | ILS System Administration: Enterprise, ILS, Univ. Admin, APIs | OPAC (guided w/ instructor) |
| **5:30 PM- 6:30 PM** | | Wrap up session with SirsiDynix & SWAN ILS Committee | | |

Please contact Brande Redfield brande.redfield@railslibraries.info or at 630-734-5164 if you have problems registering in L2.

Please go to L2 to register for sessions in your areas of interest. Links to L2 are provided in electronic versions of this memo. **We suggest that each library send no more than 2 of its staff to any one session. You'll note that some sessions are repeated, in which case libraries may send up to 2 staff to EACH session.**

## Equinox Day 1:  October 7, 2013

| Time | Meeting Room (max 95) | Room A (max 20) | Room B (max 35) | Computer Lab (max 15) |
|---|---|---|---|---|
| 9:00 – 10:00 AM | General Overview of Evergreen, Equinox & Services: for library directors and attendees (repeated day 2) | | | |
| 10:00 – 12:45 | Circulation, Reserves/Holds, & ILL (repeated on day 2) | Reports: Equinox Webinar (repeated after lunch) | Cataloging, Authority & Bibliographic Control | Evergreen hands-on (self-guided) |
| 12:45 – 1:45 | **LUNCH BREAK** | | | |
| 2:00 – 5:00 PM | OPAC & E-content (repeated on day 2) | Reports: Equinox Webinar (repeat from morning) | Evergreen System Administration | Evergreen hands-on (self-guided) |
| 7:00 – 8:00 PM (optional) | General Overview of Evergreen, Equinox & Services: for library directors and attendees (repeat from day 1 morning & repeated day 2) | | | |

Please contact Brande Redfield brande.redfield@railslibraries.info or at 630-734-5164 if you have problems registering in L2.

Please go to L2 to register for sessions in your areas of interest. Links to L2 are provided in electronic versions of this memo. **We suggest that each library send no more than 2 of its staff to any one session. You'll note that some sessions are repeated, in which case libraries may send up to 2 staff to EACH session.**

## Equinox Day 2: October 8, 2013

| Time | Meeting Room (max 95) | Room A (max 20) | Room B (max 35) | Computer Lab (max 15) |
|---|---|---|---|---|
| **9:00 – 10:00 AM** | General Overview of Evergreen, Equinox & Services: for library directors and attendees (repeat from day 1) | | | |
| **10:00 – 12:45** | OPAC & E-content (repeat from day 1) | Reports: Equinox Webinar (repeat from day 1) | Acquisitions & Serials | Evergreen hands-on (self-guided) |
| **12:45 – 1:45** | **LUNCH BREAK** | | | |
| **2:00 – 5:00 PM** | Circulation, Reserves/Holds, & ILL (repeat from day 1) | | | Evergreen hands-on (self-guided) |
| **5:30 PM- 6:30 PM** | | Wrap up session with ILS Committee and Vendor | | |

Please contact Brande Redfield brande.redfield@railslibraries.info or at 630-734-5164 if you have problems registering in L2.

Please go to L2 to register for sessions in your areas of interest. Links to L2 are provided in electronic versions of this memo. **We suggest that each library send no more than 2 of its staff to any one session. You'll note that some sessions are repeated, in which case libraries may send up to 2 staff to EACH session.**

## VTLS  Day 1: October 10, 2013

| Time | Meeting Room (max 95) | Room A (max 20) | Room B (max 35) | Computer Lab (max 15) |
|---|---|---|---|---|
| 9:00 – 10:00 AM | VTLS Overview: company, software solutions | | | |
| 10-11 | Circulation/Profiler/Request Management (repeated day 2) | Development Roadmap "Open Skies" | Reference/searching /navigation/bibs and items/patron records | |
| 11-12 | | Project Management | | |
| 12-12:45 | | Consortia Architecture | | |
| 12:45 – 1:45 | **LUNCH BREAK** | | | |
| 2:00 – 5:00 | OPAC & E-content (repeated day 2) | Acquisitions & Serials | Cataloging & Authority Control | |
| 7:00 – 8:00 PM (optional) | VTLS Overview: company, software solutions | | | |

Please contact Brande Redfield brande.redfield@railslibraries.info or at 630-734-5164 if you have problems registering in L2.

Please go to L2 to register for sessions in your areas of interest. Links to L2 are provided in electronic versions of this memo. **We suggest that each library send no more than 2 of its staff to any one session. You'll note that some sessions are repeated, in which case libraries may send up to 2 staff to EACH session.**

## VTLS  Day 2: October 11, 2013

| Time | Meeting Room (max 95) | Room A (max 20) | Room B (max 35) | Computer Lab (max 15) |
|---|---|---|---|---|
| 9:00 – 10:00 AM | VTLS Overview: company, software solutions | | | |
| 10:00 – 12:45 | OPAC & E-content (repeat from day 1) | Reports-Infostation, AdHoc | Cataloging/ Authority Control | |
| 12:45 – 1:45 | **LUNCH BREAK** | | | |
| 2-3 | Circulation/Profiler/Request Management (repeat from day 1) | Discovery – federated searching | System Administration | |
| 3-4 | | Data migration | | |
| 4-5 | | Training & Documentation | | |
| 5:30 PM- 6:30 PM | | Wrap up session with ILS Committee and Vendor | | |

Please contact Brande Redfield brande.redfield@railslibraries.info or at 630-734-5164 if you have problems registering in L2.