



Request for Proposals

Mississippi Valley State University

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Bids/Proposals – Do not include State or Federal Taxes in your bids/proposals. The University is exempted from these taxes. All orders will be placed with successful bidder by Official Purchase Order.

Change Order:

Mississippi Valley State University is considering the purchase of the following item (s). **We ask that you submit your Bids/Proposals in three copies.** All Rights are reserved to accept, or reject any and all parts of your bid/proposals. Your bid/proposals will be given consideration if received in this Office on or before the date and time below.

This bid/proposal will be awarded on a line by line basis

This bid/proposal will be awarded on a all or none basis

However, the University reserves the rights to award any and all bids/proposals in the best interest of the University.

Bid/Proposal opening {Date and Time}

Mississippi Valley State University

By: Billy D. Scott Purchasing Agent

Email: bscott@mvsu.edu

NOTE: If you cannot quote on the exact material shown, please indicate any exceptions, giving brand names and complete specifications on any alternate. Mississippi Valley State University reserves the rights to accept any alternate of equal or greater quality or performance. We also reserve the rights to waiver any irregularities that may appear in the Bids/Proposals specifications.

ITEM	QUANTITY	DESCRIPTIONS	UNIT PRICE	TOTAL NET PRICE
<i>Please show Bid/Proposals No. on outside of Envelope</i>				

If checked, Mississippi Valley State University reserves the rights for an additional 60 days to purchase and additional 20% of this bid/proposal at the same cost.

We quote you as above F.O.B – Mississippi Valley State University. Shipment can be made within _____ days from receipt of the order.

Company Quoting

Terms: _____

Date: _____

Phone/Fax: _____

Official Signature: _____

Introduction

Purpose

Mississippi Valley State University's James H. White Library solicits proposals from qualified and experienced vendors to provide a cloud-based Integrated Library System (ILS) to manage the entire life cycle of library materials in all formats. The awarded contractor will implement the system, migrate data from the existing ILS to the new ILS, provide support and maintenance of the system, train staff in the use and management of the new ILS, and offer relevant canned reports to meet the operational needs of the library.

About the library

Mississippi Valley State University is recognized as a Carnegie Classified Master's University, providing comprehensive undergraduate and graduate programs in education, arts and sciences, and professional studies. The institution encompasses one main campus with an approximate student enrollment of 2,147. The James H. White Library serves students of all degree programs in support of the university's mission.

The mission of the James H. White Library is to enhance access, collect, organize and maintain a print and non-print collection that supports the university's mission of research, teaching and learning, and service through the development of collections, access services and effective delivery of services.

Due to lack of availability of a Systems Administrator and IT support, the Library is interested in receiving proposals from vendors who have an integrated automated library system with the ability to host the library data and vendor software. The system must be in full production with an installed customer base that requires no hardware by the client. Proposals for total systems in an Alpha or Beta phase (or any testing phase) of development will not be considered. The Library reserves the right to evaluate all proposals solely based on currently existing features, functions, products, or services.

Statistical Information	
Collection:	
Print collection size (please include print books (volumes), serial back files, audio/visual, and serials held)	131,279
Ebook Collection Size	22,447
FTE enrollment	2,147
Annual circulation	7,692
Number of physical locations/branches	1

Associated Systems	
Current ILS	SirsiDynix Symphony SaaS
Student information system - source of patron data files	Banner 9
Campus financial system	Banner 9

Campus authentication service (Microsoft Active Directory, CAS, etc.)	Microsoft Active Directory
Interlibrary loan software	ILLiad
Discovery solution	EBSCO Discovery
Link resolver	EBSCO Full-Text Finder
Course management software	Canvas
Self-check machine provider	n/a
PC reservation software provider	n/a
Print management software provider	Print Manager
Consortia borrowing system	Mississippi Academic Libraries Consortium & Dancing Rabbit Library Consortium

Timeline

The following key dates will be used for the solicitation of bids, evaluation, selection, and eventual implementation of the new ILS.

Submission of RFP to vendors	May 5 & May 12, 2020 for Dates to appear in newspaper
Clarifying questions from vendors	May 18, 2020
Answers to clarifying questions	May 25, 2020
Due date for proposal response	June 10, 2020 by 2:00 p.m.
Vendor presentations	June 2-4, 2020
Implementation start date	[August 10, 2020]
Go-live date	January 1, 2021

Contact

Please submit RFP response and/or clarifying questions via email to the following contact:

Contact name: Ms. Carla Williams
Contact title: Director of Purchasing
Contact email: cwilliams@mvsu.edu
Contact address: MVSU 7244 14000 Hwy 82 W. Itta Bena, MS 38941
Contact phone number: 662-254-3320

Technical Proposal

Company Information

Overview

Provide an overview of your company, highlighting its history and experience in providing the proposed ILS to libraries. Please include the type of company (individual, partnership, corporation, nonprofit corporation, etc.), years in business and the number of employees.

What is your company's mission/philosophy?

Identify staff members who would be involved in implementing the proposed solution, including a summary of their qualifications.

Library system expertise

How many customers are currently running your ILS? Were any of these migrated from the system currently used by our library?

Discuss your company's history and partnership with libraries, museums, archives, or similar cultural institutions.

Discuss the role that research, and usability testing plays in the development of your system.

List any professional awards or technical recognition your company has received in the past five years.

Unique solution elements

What specific features distinguish your system from other solutions?

References

Provide the names and contact information for a minimum of three (3) references currently using the proposed system.

Functional Requirements

The following sections contain both checklist items and narrative questions. Use the relevant response code for each checklist item, clarifying your response in the Comments column when necessary. Provide any lengthier comments and/or screenshots in a separate attachment.

Required Functional Requirements are noted with an R in the first column.

Response Codes:

A – Available. The feature or component is available and in use by libraries today. Available features are assumed to be part of the general system and available at no additional cost.

D – Under Development. The feature or component is currently being developed by the vendor for release at a later date. Vendor should specify the projected date for release and indicate whether there is a separate cost.

U – Unnecessary. The feature or component is unnecessary as described because the system provides an alternative means for achieving the desired function. Vendor should explain the alternative approach in the comments.

N – Not available. The feature or component is not currently available, nor is development planned.

O – Optional. The feature or component is available and in use by libraries today as a separately priced option. Please specify the additional cost in the Pricing section.

System

Architecture

		FUNCTIONAL REQUIREMENTS		
		SYSTEM		
		Architecture	Code	Comments
1.	R	System is hosted by the vendor in a cloud or Software-As-A-Service (SaaS) environment. Please indicate cloud or SaaS in the Comments.		
2.	R	System is a true multi-tenant solution, so that updates happen automatically,		

		allowing the library to always have the latest version with the latest enhancements.		
3.	R	System access requires only a web browser. Specify which browsers are supported by your system.		
4.		Staff and user interfaces are ADA (Section 508) compliant for users with disabilities. Please describe any exceptions in the comments.		
5.		System access requires reasonable network connectivity to the Internet. Specify the minimum and recommended bandwidth needed to access the system.		
6.		System is accessible using multiple operating systems (e.g., Windows, OS/X, Linux). Specify any functional limitations that might exist for particular operating systems.		
7.		System provides effective and continuous monitoring of its performance and uptime to meet agreed upon service level commitments.		
8.		System supports basic fulfillment capabilities during a local institution outage (e.g., an offline circulation component). In the Comments, please describe this capability in more detail.		

Reliability and performance

FUNCTIONAL REQUIREMENTS				
SYSTEM				
Reliability and performance			Code	Comments
9.	R	System must be fully available and accessible 24/7, excluding downtime for maintenance and upgrades. Specify the infrastructure in place to ensure this requirement.		
10.	R	Company warrants the performance of its system to at least 99 percent effective uptime.		
11.	R	System runs efficiently during times of peak use. Describe how the system addresses competing needs, particularly in a cloud environment that serves hundreds of libraries.		
12.	R	System is continually monitored to maintain optimal performance. Describe the mechanisms in place to provide such monitoring.		
13.		System requires minimal downtime in order to perform scheduled maintenance or software upgrades. Describe how libraries are informed of any planned downtime.		
14.		System imposes few if any limits on both the size of and the number of values in data elements within records of various types which the system manages.		

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Security

FUNCTIONAL REQUIREMENTS				
SYSTEM				
Security			Code	Comments
15.	R	Vendor employs industry best practices for data security, especially those to safeguard personal information. Provide relevant information on standards compliance (such as ISO 27001) and any completed organizational information technology audits.		
16.	R	System uses secure transit protocols such as SSH Public Key Authentication, SFTP, and HTTPS.		
17.	R	System maintains personal information securely and conforms to relevant legislation (such as FERPA).		
18.	R	Vendor follows industry best practices for regular data and system backups and backup storage. Provide an overview of such practices for the system.		
19.	R	System provides data recovery in the event of data loss or corruption. Specify whether data recovery is a self-service process or requires the intervention of the vendor.		

20.	R	System uses at least 128bit encryption and SSL for communications. Describe the encryption and other measures used to store and secure confidential data.		
21.		Vendor has established protocols for dealing with unauthorized access to or disclosure of confidential data.		
22.		Vendor maintains industry best practices for data protection and security in the data centers of the hosted environment. Describe the security measures in place at data center(s).		
23.				

Describe how the system protects patron data and privacy.

Authentication and authorization

FUNCTIONAL REQUIREMENTS				
SYSTEM				
Authentication and authorization			Code	Comments
24.	R	System must integrate with the library's authentication system.		
25.	R	System provides a robust staff authorization feature that assigns staff authorizations based on role and specific function.		
26.		System maintains authentication as patrons navigate among databases and other aggregated content.		

27.		System allows staff authorization profiles to be copied.		
28.		System provides an unlimited number of staff logins.		

Integration and extensibility

FUNCTIONAL REQUIREMENTS				
SYSTEM				
Integration and extensibility			Code	Comments
29.	R	System allows integration with the campus administration system for loading and maintaining patron records.		
30.	R	System allows integration with the campus financial system used for ordering, invoicing, payment of library bills, etc.		
31.	R	System allows integration with a proxy service such as EZproxy to facilitate remote access.		
32.	R	System allows integration with WorldShare ILL for resource sharing purposes.		
33.		System allows integration with third-party vendor ordering systems to facilitate processing of orders and payments for such materials.		
34.		System allows integration with self-check machines.		

35.		System provides a documented set of APIs and/or web services.		

Describe how the solution exposes data through documented APIs and web services. Is there an additional charge for these services?

Describe your company's support for creating and using web services based on published APIs. How are libraries able to learn and collaborate with other users in developing their own web services?

Discovery

General user experience

FUNCTIONAL REQUIREMENTS				
Discovery				
		General user experience	Code	Comments
36.	R	System includes a web-based public interface that is accessible by a variety of modern browsers. Please indicate the browsers in the Comments.		
37.	R	System includes an interface optimized for use on mobile devices (i.e., not the standard web interface merely accessed from a mobile browser).		
38.	R	System integrates content data in display, such as tables of content, book covers, and book reviews.		
39.	R	System allows searching across all types of content (e.g., physical, digital, electronic) in a single search.		

40.	R	System authenticates users for access to licensed and online resources.		
41.	R	System uses a central index that provides seamless access to all institutionally licensed content across providers without additional costs.		
42.	R	System allows single-click retrieval of online resources.		
43.	R	System allows patrons to access their account information: loans, fines, hold requests.		
44.	R	System allows patrons to request items from the catalog.		
45.		System updates records in real-time, including their circulation status.		
46.		System requires no batch loading or nightly re-indexing of the data.		
47.		System allows patrons to reset their own passwords.		
48.		System allows persistent links to public interface screens, including search results sets, search results sets with limiters applied, and individual records.		
49.		System provides a branded search box builder that can be used in various places on the library web site.		

Describe the interface designed for the public to discover and access all types of resources in the system.

Describe what a patron can do once logged in their library account: view and renew items checked out, place hold requests, recall items, view fines, etc.

Describe the unique features of your discovery solution.

Integration and customization

FUNCTIONAL REQUIREMENTS				
		Discovery		
		Integration and customization	Code	Comments
50.	R	System allows the library to customize the interface with its own logo, colors, and other branding. Describe how staff will do this in Comments.		
51.	R	System permits the library to make changes to the interface without vendor intervention.		
52.		System integrates with ILS course reserve system.		
53.		System interoperates with online reference chat services.		
54.		System integrates with the acquisitions component of the ILS to support patron-driven acquisitions.		

Describe user interface and functionality for access to course reserves materials.

Searching

FUNCTIONAL REQUIREMENTS				
Discovery				
Searching			Code	Comments
55.	R	System uses a persistent single search box that allows users to search the system from every screen.		
56.	R	System offers both basic and advanced search capabilities. Describe advanced searching capabilities in Comments.		
57.		System supports faceted browsing.		
58.		System supports selection of multiple facets.		
59.		System provides pre-search filtering (e.g., by library, format, library-specific location, publication date, availability, etc.). Please describe.		
60.		System facilitates known-item searches.		
61.		System optimizes searches for short titles so that results appear at or near the top of result sets.		
62.		System connects searchers with resources or context-specific help in locating resources if a search does not produce results (i.e., there are no 'dead end' searches).		

63.		System provides features (e.g., suggestions, spellcheck, et al.) that help users construct effective search queries.		

Describe the parameters by which searches can be qualified or limited.

Result lists and records

FUNCTIONAL REQUIREMENTS				
Discovery				
Result lists and records			Code	Comments
64.	R	System supports filtering of result sets (e.g., by library, format, library-specific location, publication date, availability, etc.).		
65.		System allows saving and managing query sets.		
66.		System de-duplicates search results.		
67.		System correctly displays non-Roman characters and diacritics and files such characters correctly in search results and bibliographic displays.		
68.		System supports clustering of results using FRBR or similar algorithm.		
69.		System exports records to bibliographic software such as EasyBib, Refworks or Endnote. In the comments section,		

		please list the software your company supports.		

Describe features to support user creation, saving, export, and formatting of lists, including the ability to format such lists in scholarly style, export, email, or save.

Access Management

Circulation administration

FUNCTIONAL REQUIREMENTS				
Access Management				
Circulation administration			Code	Comments
70.	R	System allows the library to create and administer its own circulation policies.		
71.	R	System integrates loan rules with the library calendar (e.g., items are not due on days or hours during which the library is closed). Describe in Comments how the system integrates lending rules with library hours and closures, including fixed due dates for the end of an academic term.		
72.	R	Supports RFID tags and scanning of barcodes as well as keyboard entry of patron and item barcodes.		

73.	R	System can automatically block a patron account under specific conditions (e.g., exceeding the amount of money owed) and automatically unblocks when the condition is remedied.		
74.	R	System allows authorized staff to override system parameters such as due dates, check-in times, blocks, etc.		

Describe the process to manage and make changes to circulation parameters.

Check in and check out

FUNCTIONAL REQUIREMENTS				
Access Management				
Check in and check out			Code	Comments
75.	R	System permits materials to be checked out to patrons according to library-defined rules.		
76.	R	System allows checked out materials to be renewed according to library-defined rules.		
77.	R	System alerts staff during check out and check in when certain circumstances occur: holds, fines, patron, or item notes, etc.		

78.	R	System prints date due receipts automatically or on demand to an attached or networked printer.		
79.	R	System has the capability to perform circulation transactions when the system is offline or otherwise unavailable. Describe the offline circulation capability in Comments.		
80.		System allows authorized staff to manually set the date for check-in and override default due dates.		
81.		System alerts staff during checkout that the item is already checked out and allows it to be checked in and out in a single step.		
82.		System allows staff to check out an uncatalogued item as a temporary item.		
83.		System tracks usage statistics for items that do not circulate.		
84.		System allows loaned materials to be automatically renewed (e.g., to faculty members).		
85.		System allows staff to renew one, several or all items currently loaned to a patron with a single click.		

Describe the check in/check out workflow at a circulation desk, including the renewal functionality.

*Hold*s

FUNCTIONAL REQUIREMENTS				
Access Management				
Hold			Code	Comments
86.	R	System supports staff-initiated and patron-initiated hold requests and recalls.		
87.	R	System alerts staff in real time that an item is needed to fill a hold request. Describe in Comments the mechanism that notifies staff which items are needed to fulfill hold requests for patrons.		
88.	R	System prints hold receipts automatically or on demand to an attached or networked printer.		
89.	R	System allows loaned materials to be recalled with the capability to shorten the loan period and impose a different fine structure.		
90.		System displays all titles requested by a patron and all patrons with hold requests for a title.		
91.		System allows patrons and staff to specify the location at which the patron wishes to pick up the item.		
92.		System allows patrons and staff to specify when an item is needed to fulfill a hold request, including the date needed by, date no longer needed.		

93.		System allows patrons and staff to specify a time period during which hold requests should not be fulfilled (i.e., hold suspension periods).		
94.		System allows hold requests to be cancelled by both patrons and staff.		
95.		System supports advance scheduling of items, including material or equipment, for specified dates and time periods.		

Discuss the system's ability to schedule items and equipment. Is there a separate cost for this feature?

Billing and payments

FUNCTIONAL REQUIREMENTS				
Access Management				
Billing and payments			Code	Comments
96.	R	System assesses fines and fees for an item automatically based on policies defined by the library.		
97.	R	System allows fines and fees to be paid (partially or in full) or waived by authorized staff.		
98.	R	System prints receipts for paid and waived bills automatically or on demand to an attached or networked printer.		

99.	R	System automatically processes materials that exceed their due date by a library-specified time period as long overdue and bills the patron.		
100.	R	System retains item-related history and transaction detail indefinitely for fines and fees, even if the item is removed from the collection.		
101.	R	System allows authorized staff to manually add or waive a fine or fee.		
102.		System processes unpaid bills for export to the campus billing system.		
103.		System maintains a history of paid and waived bill transactions indefinitely for the patron.		

Describe the process by which the system can interact with the campus billing system for the asynchronous or real time transfer of bill information.

Notification

FUNCTIONAL REQUIREMENTS				
Access Management				
Notification			Code	Comments
104.	R	System generates notices to patrons for the following: items past due, items being held for pickup, items no longer being held for pickup, items recalled, outstanding bills.		
105.	R	System automatically sends notices to patrons via email. Describe in Comments how notices are scheduled to be generated and sent automatically.		
106.		System provides customizable templates for creating notices and receipts. Describe this functionality in Comments.		
107.		System generates notices that may be printed and sent to patrons in lieu of email transmission.		
108.		System can generate pre-overdue notices to alert patrons of an item's impending due date.		
109.		System maintains a history of notices sent to the patron.		

Course reserves

FUNCTIONAL REQUIREMENTS				
Access Management				
Course reserves			Code	Comments
110.	R	System allows staff to create, edit and delete courses.		
111.	R	System allows staff to place items on reserve for a course.		
112.	R	System allows searching for course reserves by course name, course number, and instructor's name, among other options.		
113.	R	System displays course reserves in the public interface.		
114.		System allows courses to have multiple instructors.		
115.		System allows an item to be on reserve for multiple courses.		
116.		System allows courses to be cross listed (e.g., ART 102 is also taught as LIT 105).		
117.		System allows authorized users to archive course reserve information at the end of a semester and re-activate it at a future date.		
118.		System provides persistent URLs for course reserves and reading lists that can be pasted into course management systems or other third-party systems.		

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Describe the workflow for creating a course and placing an item on reserve. Show how this work is reflected in the public interface.

Patron management

FUNCTIONAL REQUIREMENTS				
Access Management				
Patron management			Code	Comments
119.	R	System creates and updates patron information in batch by loading data files from the campus registration system. Describe in Comments the batch uploading of data process and to what extent the process can be automated.		
120.	R	System accommodates an unlimited number of patron types.		
121.	R	System patron records to be searched by a variety of data points, including name and email address. Describe in Comments the data elements that comprise a patron record.		
122.		System allows notes to be added to a patron record.		
123.		System allows authorized staff to add a block to a patron's record manually.		
124.		System retains expired patron records that have financial information linked to them for fines and fees.		

125.		System allows staff to create patrons manually to accommodate community borrowers.		

Metadata Management

Cataloging

FUNCTIONAL REQUIREMENTS				
Metadata Management				
Creation and import			Code	Comments
126.	R	System can import records individually or in batch (e.g. bibliographic, order, authority, item, patron, etc.).		
127.	R	System offers options for handling records detected as duplicates: adding, merging, replacing, or ignoring.		
128.	R	System imports and exports bibliographic, holdings and authority records in MARC21 as well as order and item records from third-party suppliers such as Baker & Taylor and Marcive.		
129.	R	System must interact with OCLC's Cataloging Services for metadata records.		

130.		System validates records based on established cataloging practice.		
131.		System imports and exports records from common metadata schemas such as Dublin Core, VRA Core, etc. Specify the schema supported by the system.		
132.		The library retains ownership of records within the institutional catalog.		
133.		System imposes no limitations on the number of records that can be imported or exported.		

Describe the process of importing records from a bibliographic database such as OCLC's WorldCat.

Holdings management

FUNCTIONAL REQUIREMENTS				
Metadata Management				
Holdings management			Code	Comments
134.	R	System can create holdings and item records for both physical and electronic resources.		
135.	R	System supports method for updating and editing batches of item records or holdings records through barcode scanning or identification number import.		

136.	System supports the MARC21 Format for holdings data.		
137.	System supports export and import of holdings records.		
138.	System allows an unlimited number of copy/item records with various locations to link to a single bibliographic record.		
139.	System allows a holdings record to be moved to a different bibliographic record, or an item record to be moved to a different holdings record, while retaining statistics and relevant linking information (e.g., the link to the purchase order).		
140.	System supports linked records for items bound together with separate bibliographic records but shared holdings/item records.		
141.	System allows staff to manage inventory effectively. Describe in Comments how inventory control is managed by the system.		

Describe how local holdings are set in the OCLC WorldCat database for all library resources.

Authority control

FUNCTIONAL REQUIREMENTS				
Metadata Management				
Authority control			Code	Comments
142.	R	System supports MARC/RDA authority records including Library of Congress name and subject Headings and genre/form terms.		
143.	R	Vendor provides a global, shared authority file.		
144.	R	System supports staff creation, revision, and deletion of local authority		
145.	R	System automatically checks and updates headings in bibliographic records against the authority file.		

Describe how the system manages the import and export of authority data from one or more authority vendors such as MARCIVE.

Resource Management

Acquisitions

Fund management

FUNCTIONAL REQUIREMENTS				
		Resource Management		
		Acquisitions		
		Fund management	Code	Comments
146.	R	System supports a hierarchical fund structure that provides the ability to group and report on funds.		
147.	R	System displays fund balances in real time (including encumbrances and expenditures).		
148.	R	System allows library staff with sufficient privilege to adjust the amount of funds (add new money, transfer money from one fund to another) at any time during the fiscal cycle.		
149.	R	System facilitates the closing of a budget at the end of a fiscal cycle with options to rollover amounts and encumbrances to the next cycle.		
150.		System updates fund amounts in real time.		
151.		System supports a graphic display of fund balance, allocation, expenditure, encumbrances.		

152.	System imposes no limits on the number of funds.		
153.	System allows the library to define its own fiscal cycle with no restrictions on starting or ending dates or duration of cycle.		

Describe the structure of funds in the system. Is there a limit on the length of fund names?

Describe the solution's support for closing a budget at the end of a fiscal cycle.

Vendor management

FUNCTIONAL REQUIREMENTS				
		Resource Management		
		Acquisitions		
		Vendor management	Code	Comments
154.	R	System supports full vendor records that include account numbers, contact information, notes and EDIFACT transmission details.		
155.		System permits multiple accounts for a single vendor.		
156.		System can access a central database of vendors to minimize the rekeying of information common to all users (e.g., addresses, global contacts).		

Describe the structure of vendor data in the system and how it is used in different functional areas.

Ordering and renewing

FUNCTIONAL REQUIREMENTS				
		Resource Management		
		Acquisitions		
		Ordering and renewing	Code	Comments
157.	R	System imports MARC-based order files from orders generated in other vendor systems like Baker & Taylor.		
158.	R	System offers a full EDI interface with major library vendors for ordering and invoicing.		
159.		System reflects order status information in real-time and displays current status in staff display and in the user interface if desired.		
160.		System links a purchase order to other related information such as invoice, vendor, and descriptive record.		
161.		System allows holds to be placed against titles on order or in process.		
162.		System allows orders for non-bibliographic material using the same funds that order and pay for bibliographic material.		
163.		System facilitates the renewal of subscription titles with a minimum of staff interaction.		

164.	System allows orders to be cancelled with appropriate notification sent to vendors.		
165.	System accommodates Patron Driven Acquisitions (PDA/PDD) plans for print and electronic resources.		

Describe the workflow for importing MARC-based order records from vendors.

Invoicing and receiving

FUNCTIONAL REQUIREMENTS			
		Resource Management	
		Acquisitions	
		Invoicing and receiving	Code Comments
166.	R	System permits the receipt of single-title monographs, serial monographs, and issues of serials.	
167.	R	System allows print items to be received from both purchase orders and invoices.	
168.		System supports adding items to the collection which are not purchased.	
169.		System notifies patrons when a requested item has been received.	
170.		System allows payment for a single item from multiple funds.	
171.		System provides an audit trail for financial transactions.	

172.		System can export invoice/payment requests to campus financial systems and import payment confirmation files.		

Describe the workflow for receiving an item that was not ordered, such as a gift.

Claiming

FUNCTIONAL REQUIREMENTS				
		Resource Management		
		Acquisitions		
		Claiming	Code	Comments
173.	R	System notifies staff when a volume or issue has not arrived and allows for claiming of missed items.		
174.		System allows claims to be sent by EDI, email, or print.		
175.		System allows claims to be manually generated at any time.		

Describe how an expected item becomes claimable.

Serials management

FUNCTIONAL REQUIREMENTS				
Resource Management				
Serials management			Code	Comments
176.	R	System allows the receipt of print serial issues, including creating item records when required.		
177.	R	System provides date prediction and enumeration patterns for issue check-in.		
178.	R	System supports claiming of serial issues based on prediction patterns.		
179.		System allows check-in for multiple parts of a title, including regular issues, indexes, supplements, pocket parts, etc.		
180.		System accommodates the check-in of special issues that were not predicted.		
181.		System automatically updates the display of issue receipt in the public catalog.		
182.		System updates the MARC21 holdings record (85X/86X paired fields) automatically during check-in.		
183.		System correctly links serial title changes in both the staff and public catalogs.		

Describe the process for checking in serial issues, including creating item records for issues that circulate.

What makes your system for serials management unique?

Electronic resources management

FUNCTIONAL REQUIREMENTS				
Resource Management				
		Electronic resources management	Code	Comments
184.	R	System facilitates management of purchased electronic resources as well as e-content available via open access.		
185.	R	System manages license agreements for all electronic resources.		
186.	R	System provides a comprehensive knowledgebase of electronic titles and packages from a wide variety of providers.		
187.	R	System provides an integrated OpenURL resolver.		
188.		System manages administrative information for electronic resources and contact information for vendors and publishers.		
189.		System permits trial periods to evaluate e-resources.		
190.		System permits easy activation of electronic packages and titles purchased by the library.		

191.	System displays an electronic resource in the public catalog automatically when it is activated in the knowledgebase.		
192.	System supports one-click resolution to full text access when supported by target provider.		
193.	System allows digital versions of license agreements to be attached to licenses.		
194.	System supports the ERMI schema for licenses.		

Describe the overall workflow for the management of licensed content in your system.

Describe how the system stores and displays licenses and related documents, including the fields available for license terms.

Reports and Analytics

FUNCTIONAL REQUIREMENTS				
Reports and analytics				
General			Code	Comments
195.	R	Provides statistical reports as a standard component of the ILS.		
196.	R	Allows customization of reports by staff members with appropriate privilege, including but not limited to		

		updating report parameters, views, dates, etc.		
197.	R	Allows reports to be run automatically on a schedule that the library chooses.		
198.	R	Allows staff to run a report manually at any time.		
199.	R	Provides output in a format (.csv, .txt) that is easily imported to common spreadsheet software like Microsoft Excel.		
200.		Does not require knowledge of SQL to create, modify, schedule, or run		
201.		Complies with industry usage reporting standards such as SUSHI and COUNTER.		
202.		Aggregates historical data for ease in compiling trend analysis (such as usage or expenditures).		
203.		System can report on specified parts of the collection (e.g., material format, patron category, etc.) or the entire collection. In the comments, please state any limits to the number of records available for reporting.		
204.		System retains transaction-oriented information (without patron-identifiable data) indefinitely for statistical reporting purposes, even if the associated item or patron has been removed from the system.		

		Collection reports	Code	Comments
		Please indicate if the proposed system offers collection reports for the following:		
205.	R	Holdings by Library of Congress classification ranges		
206.	R	Holdings by publication date		
207.	R	Holdings by material format		
208.	R	Holdings by location		
209.	R	Holdings added within a time range		
210.		Count of holdings by publication date (i.e., age of collection)		
211.		List of items flagged as withdrawn, lost, missing, etc.		
		Acquisition reports	Code	Comments
		Please indicate if the proposed system offers acquisitions reports for the following:		
212.	R	Balance report of fund appropriations, expenditures, encumbrances, and free balance		
213.	R	Expenditures by Library of Congress classification range and time period		
214.	R	Encumbrances and expenditures by type of material		
215.	R	Open encumbrances		
216.	R	Payment activity by fund		
217.		Payment activity by vendor		
218.		Payment activity by material format		

219.		Payment activity by location		
220.		Payment activity by requestor		
		Circulation reports	Code	Comments
		Please indicate if the proposed system offers circulation reports for the following:		
221.	R	Circulation activity (loans, renewals, requests, returns) by time period		
222.	R	Circulation activity (loans, renewals, requests, returns) by borrower type		
223.	R	Circulation activity (loans, renewals, requests, returns) by location		
224.	R	Circulation activity (loans, renewals, requests, returns) by material format		
225.	R	Outstanding fines		
226.	R	Overdue items		
227.		Items used in-house		
228.		Daily fines collected by location		
229.		Recalled items		
		Patron reports	Code	Comments
		Please indicate if the proposed system offers patron reports for the following:		
230.	R	Patrons added within a time range		
231.	R	Patrons by borrower type		
232.		Patrons by demographic category (e.g., field of study, postal code, etc.)		

		Electronic resources reports	Code	Comments
		Please indicate if the proposed system offers electronic resources reports for the following:		
233.	R	Coverage overlap		
234.	R	Most used titles		
235.		Seldom or never used titles		
236.		COUNTER usage (database, e-journal, e-book)		

Describe the process of modifying and running standard reports.

Describe the creation of custom reports using a report authoring interface if one is available with your system.

Support

Customer Support

Describe the support of the service available from your company, including customer support hours.

Discuss the procedure for reporting problems, including who from the institution may contact your company's support operation and the methods of such contact.

Describe the criteria used to determine the need for high-priority support, including your escalation procedure.

Describe the schedule and procedure for installing software upgrades and patches, including when and how customers are alerted to such events.

Discuss how software bugs are identified, reported, communicated to the user community, and fixed.

Describe the resources and materials available for customers to troubleshoot and/or solve their own problems with the service (e.g., documentation, FAQ, release notes, patch information, etc.).

Discuss how libraries can help steer the direction of the product and its effective use.

Describe any customer community activities you sponsor or support, such as online or in-person venues to allow customers to share ideas and solutions. Include information about annual conferences and attendance, and regional interest groups.

Implementation and training

Provide a typical implementation and migration timeline and project plan.

Describe the communication channels that the library and vendor will use during the project.

Describe the library staff resources required to support the migration and implementation work for the proposed solution, including roles required, level of involvement, and length of involvement.

Describe the implementation training program content, method of delivery, and materials.

Describe the configuration and customization decisions that the library makes during implementation, including any configuration that can only be performed by the vendor.

Data Migration

Describe the methodology for migrating data from the library's current ILS, including the steps involved in migrating bibliographic, item, patron, and circulation data.

Describe testing and cleanup processes to ensure that all data is migrated properly.

Discuss any opportunities for record cleanup and enhancement during the migration process.

Describe the process of ongoing patron data loads after the initial migration is complete.

Cost Proposal

Pricing template

Please provide your cost structure for five years of use and detail of all costs Mississippi Valley State University James H. White Library would likely incur. In addition to an out-right purchase price, include as part of the proposal a finance plan for entire proposed system software package over a period of 5 years, beginning on January 1, 2021 and ending on December 31, 2025.

Provide rates and all associated fees corresponding with the services described within this proposal.

Please include annual percentage rate increases (a locked in rate or cap is preferred) and outline pricing for each year of the contract term.

Provide rates and all associated fees corresponding with the services described within this proposal.

Please include annual percentage rate increases (a locked in rate or cap is preferred) and outline pricing for each year of the contract term.

For example, cost structure may include the following and must include all charges the library will incur for the proposed system:

- Annual subscription/license fees
- Hosting fees
- Implementation fees
- Training fees
- Support fees
- Maintenance costs
- Customization costs

Pricing should clearly indicate description and total price. Include broken out costs with a total cost over a five-year period.

Solution	Year 1	Year 2	Year 3
Total			
Optional Services	Year 1	Year 2	Year 3
Total with Optional Services			

Contract Terms and Conditions
