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**Request for Proposal**

**Shared Library Management Service**

**Major Deadlines**

August 19, 2016, 5:00 pm Eastern Daylight Time

**Declaration of Intent to Bid (Appendix I)** delivered as MSWord or pdf attachment to rfp@mcls.org.

August 26, 2016, 5:00 pm Eastern Daylight Time

**Deadline for submission of questions.** All questions must be sent to rfp@mcls.org

October 7, 2016, 5:00 pm Eastern Daylight Time

**Proposal delivered** as MSWord or pdf attachment to rfp@mcls.org

See Section C.2 for complete Schedule of Events.

Sole contact for all questions and correspondence:

Randy Dykhuis

Executive Director

MCLS

1407 Rensen Street

Lansing, MI 48910

Email: rfp@mcls.org

Questions about the RFP must be submitted in writing.

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# Introduction

On behalf of the Michigan Shared System Alliance (MSSA), the Midwest Collaborative for Library Services (MCLS) encourages proposals from qualified vendors, nonprofit organizations, and others offering to provide a library management system (LMS) in a consortial environment to a group of public and private institutions in Michigan. MSSA/MCLS seeks a long-term partner that will deliver a strong system with equally strong services, training, and support.

The successful bidder(s) will provide a unified system that will streamline operations, eliminate redundancies, and build on existing consortial successes in Michigan, including MeLCat, the statewide unmediated borrowing service, and the Michigan Shared Print Initiative (MI-SPI). (For more information about MeLCat, see appendix 3. For more information about MI-SPI, see its website at <http://mcls.org/engagement/mi-spi/>.) The selected system will improve information discovery through a clean and intuitive user interface, provide an efficient access and delivery experience, facilitate shared collection management among administratively separate institutions, and increase operational efficiencies by lowering total operating costs. Because the consortium expects to consider new systems and approaches, this RFP is intentionally broad in scope and focused on outcomes rather than detailed functional requirements.

MSSA has not predetermined whether this project should result in a single, shared implementation of the selected library management software or a group purchase of multiple, independent instances of the same software by the individual participating libraries. In submitting their proposals, responders should take care to provide a thorough explanation of the potential advantages and disadvantages of all shared purchase approaches to inform decision-making by MSSA. In particular, vendors should describe advantages and disadvantages of shared vs. separate bibliographic, patron, acquisitions, vendor, and electronic resource management (ERM) records/databases. Responses should make very clear if there are certain efficiencies and interlibrary collaborative endeavors (e.g. collaborative collection management and consortial resource sharing) that can only be realized in a single, shared system environment. Responses should also detail any loss of local information and customization options that a single, shared system might entail.

MSSA desires flexibility for its membership in choosing a discovery layer to serve different patron constituencies within the consortium. MSSA encourages vendors of stand-alone discovery systems to respond to this RFP and to explain how their discovery solution would interact with LMS platforms from other vendors. Similarly, LMS vendors should explain in their RFP responses how their LMS solution would interact with a discovery layer from another vendor.

# Scope and Environment

## Questions and Contact Information

Questions pertaining to this RFP may be directed in writing (email preferred) to:

Randy Dykhuis, Executive Director

Midwest Collaborative for Library Services (MCLS)

1407 Rensen Street

Lansing, MI 48910

rfp@mcls.org

Substantive answers and clarifications will be distributed to all proposers that have declared an intent to bid (Appendix I). All questions and answers will be available on the MCLS website at [www.mcls.org/rfp](http://www.mcls.org/rfp). Questions must be received by Friday August 26th, 2016 at 5:00 pm (Eastern Time). Questions received after this time will not be answered.

## Consortium Description

MSSA formed to foster information sharing among the libraries of the universities and colleges in the state of Michigan. The goal of this collaboration is to review, identify and implement a unified library management services platform that will provide increased opportunities to work collaboratively to license, manage, discover, use, share and preserve collections and resources across academic libraries in the state of Michigan.

Midwest Collaborative for Library Services (MCLS), a non-profit member-driven organization comprised of all types of libraries in Indiana and Michigan, will be a partner with the MSSA. MCLS will provide administrative and fiscal services to the consortium. For more information about MCLS, see its website at [www.mcls.org](http://www.mcls.org).

Academic Library Members:

Albion College

Ferris State University

Grand Valley State University

Hope College

Kalamazoo College

Lake Superior State University

Michigan Technological University

Oakland University

University of Michigan – Dearborn

Western Theological Seminary

# RFP Process and Timeline

## RFP Process

The RFP will proceed in four phases:

Phase 1: Declaration of Intent to Bid, Questions & Answers,

Phase 2: Written Proposals,

Phase 3: Product Demonstrations, and

Phase 4: Negotiation & Award.

Each phase is expected to yield a reduction in the number of proposals under consideration.

### Phase 1: Declaration of Intent to Bid & Questions & Answers

Those vendors intending to bid are required to submit a “Declaration of Intent to Bid” (Appendix I), due by August 19th, 2016 at 5:00 pm (Eastern Time). Based on the list of those making such a declaration, MSSA will determine and manage any Conflicts of Interest (COI). See this page on *the MCLS website:* [www.mcls.org/rfp](http://www.mcls.org/rfp).

In the interest of providing a full and complete understanding of members' involvement with proposers, the consortium will create a publicly-accessible web page that lists any involvement with declared bidders that members or individuals choose to disclose. Such disclosures are expected go beyond potential COI issues to include development partnerships, service on advisory or governing boards, leadership positions in user groups, and significant financial positions in the company. Note: COI does not apply to arm’s length financial positions that may be taken through retirement plan investments.

Substantive answers and clarifications will be distributed to all proposers that have declared an intent to bid (Appendix I). All questions and answers will be available on the MCLS website at <http://www.mcls.org/rfp>. Questions must be received by Friday August 26th, 2016 at 5:00 pm (Eastern Time). Questions received after this time will not be answered.

### Phase 2: Written Proposals

Proposers must use the space following each requirement for their answers. This format is intended to aid MSSA in evaluating and comparing proposals but does not limit creativity in responses. The consortium will score proposals and invite those submitting the strongest (highest scoring) proposals to proceed to Phase 3, Product Demonstrations. The consortium will let all proposers know who among them have been selected to provide product demonstrations and will provide an opportunity for comment.

Options for responding: Proposals will be accepted that include bids on staff functions only or Discovery only or both staff functions and Discovery. Proposers responding only to Discovery are cautioned to read the entire RFP carefully and respond to all questions about Discovery.

Required sections for all proposers:

* Section D: Systems
* Appendix 2: Price Methodology and Pricing

Staff Functions (Sections E, F, H):

* Section E: Resource Management
* Section F: Circulation & Resource Sharing
* Section H: Analytics (except H.4)

Discovery

* Section G: Discovery
* Additional questions in other sections

Please indicate below the sections that your proposal covers:

\_\_\_\_\_\_\_\_\_ Staff Functions Only

\_\_\_\_\_\_\_\_\_ Discovery Only

\_\_\_\_\_\_\_\_\_ Both Staff Functions & Discovery

It is anticipated that central staff will be required to assist the participating libraries with operation of the system. Proposals should include an estimate for the time required by central consortium staff and the types of tasks that will be necessary to manage the system. See D.9.1 below.

### Phase 3: Product Demonstrations

Proposers selected from Phase 2 will be required to provide a webinar and/or in-person presentation of their solution. Each demonstration will focus on an area of functionality determined by MSSA. Proposers will be assigned times and topics and will be required to supply Web-based conference technology and provide a recording of each session to the consortium. The consortium may contact proposers to seek clarification or ask follow-up questions before scoring product demonstrations.

The consortium will consider comments from member libraries when evaluating and scoring product demonstrations. The scores for Phase 2 (Written Proposals) and Phase 3 (Product Demonstrations) will be cumulated and used to inform the MSSA Team’s recommendations for Phase 4, Negotiation and Award. The consortium will let all proposers know who among them have been selected for negotiation and will provide an opportunity for comment.

### Phase 4: Negotiation & Award

MSSA will enter into negotiation with proposers selected via Phases 1-3. Final decisions will be made by the MSSA Executive Committee. The final contract(s) will be a separate agreement, incorporating the RFP, proposal, and subsequent negotiation. MSSA will publicly announce any contracts awarded as a result of this RFP.

MSSA reserves the right to choose any or none of the finalists.

## Schedule of Events:

August 8, 2016: Issue RFP

August 19, 2016: Declaration of Intent to Bid

August 26, 2016: Deadline to submit questions

October 7, 2016: RFP Submission Deadline

Oct – Nov 2016: RFP Evaluation Period (Executive Committee & Steering Committee)

Nov 2016: Onsite & Online Product Demonstrations for Finalists (Invitation to participate sent to all library faculty and staff at all participating libraries)

December 2016: Follow-up Discussions with Participating Libraries

January 15, 2017: Steering Committee Recommendation sent to Executive Committee

Jan 15 - April 2017: Notice of Intent to Award and Contract Negotiation (Executive Committee)

May - Dec 2017: Pre-implementation planning and preparations

Jan - Dec 2018: Implementation of selected solution for participating Libraries

## Withdrawal of Proposal

A vendor may withdraw a proposal in writing at any time up to and after the proposal closing date. To accomplish this, the written request must be signed by an authorized representative of the proposer and sent via email to rfp@mcls.org. If a submitted proposal is withdrawn before the proposal due date and time, the proposer may submit another proposal at any time up to the proposal closing date and time.

## Evaluation and Selection Criteria

Proposer must be a financially responsible and responsive firm that is presently engaged in the business of providing a hosted consortium library services platform and/or discovery system. In addition, MSSA will only consider proposals that meet the following requirements: 1) demonstrated ability to integrate with MeLCat (see Appendix 3 for detailed information about MeLCat), 2) ability to secure all institutional data, and 3) allow full accessibility for all library users regardless of physical ability.

The award will be made to the most responsible and responsive vendor whose proposal is determined to be the most advantageous to MSSA.

### Evaluation Method

All proposals shall be reviewed to verify the Proposer has met the RFP submission requirements. Proposals that have not followed the rules, do not meet content requirements, qualifications, and quality standards, take unacceptable exceptions to the terms and conditions, or are non-responsive to the required responses in this RFP will be eliminated from further consideration.

Proposals determined to have met the RFP requirements will be reviewed and evaluated. As part of this review, MSSA may require Proposers to clarify the information submitted. This clarification process may be conducted through written or electronic correspondence.

MSSA will require finalists to provide a webinar and/or in-person presentation of their solution. The purpose of the presentation is to give finalists an opportunity to demonstrate their ability to perform the scope of work defined in this RFP and clarify outstanding issues. It is in the proposing firm’s best interests to submit a thorough and complete proposal and not depend on the presentation process to provide additional information.

## General Proposal Requirements

### Business and Financial Qualifications

A statement of qualifications is required. This statement must include the following:

#### Number of years in businesses related to RFP.

#### Type of Operation (e.g., Individual, Partnership, Corporation, Nonprofit corporation, Consortium, Government, etc.).

#### Company-wide annual sales volume.

#### Number of employees.

#### Key employees involved in implementing and sustaining the proposed solution.

#### Demonstrated expertise in supporting similar services, including number of academic libraries with installations of the solution that you are proposing, number of academic library consortia with installations of the solution that you are proposing, names of key academic libraries and consortia with installations of the solution that you are proposing.

#### Demonstrated history as a trusted partner to academic libraries.

#### List of subcontractors (if any) and their expected role.

#### Evidence of a contingency plan with a neutral third party in a secure escrow account that includes terms for access to source code, object code, and data. Should the selected vendor cease to exist or their organization become financially insolvent, rights to use the code and data shall be granted to the MSSA.

### Customer References

Vendor must provide a minimum of three (3) qualified references.

References are to be from organizations that have successfully utilized the products and services. References should include all information found on the form below.

REFERENCES FORM:

Firm #1 - Name of Firm: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address of Firm: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Person: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone No. ( ) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of Project: From: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ To: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contract value: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Brief Description of Case History if applicable:

Firm #2 - Name of Firm: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address of Firm: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Person: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone No. ( ) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of Project: From: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ To: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contract value: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Brief Description of Case History if applicable:

Firm #3 - Name of Firm: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address of Firm: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Person: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone No. ( ) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of Project: From: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ To: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contract value: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Brief Description of Case History if applicable:

# System

## Architecture

### Describe the system architecture.

### Describe the database architecture.

### Describe how your solution utilizes linked data.

### Describe the development environment including any test instances or servers that are provided and initial firewall configuration and rules.

### Describe the minimum bandwidth required for participating libraries to use the system.

### Describe how software bugs are identified and fixed, including the process and frequency of patches and minor upgrades between major software releases.

### Describe the initial configuration or implementation decisions that cannot be later changed, or altered only with great effort or expense.

### Describe which system profiling/configuration decisions apply globally across the system and which can apply to a subset of institutions.

### What portions of your proposed system(s) are separable? E.g., is it possible to use an alternate discovery environment but still use your solution for fulfillment and for back-end processing? With what specific third-party discovery solutions does your solution work?

### Describe the ability of the system to schedule and automate recurring administrative events.

## Reliability

### Describe how the solution minimizes business disruption and maximizes system availability, particularly within the context of a geographically dispersed, state-wide implementation. What kind of “up” time do you typically deliver (also define any terms within your answer as appropriate)? What are the biggest risks to the solution, in terms of availability (e.g., power outages, network outages, data corruption, software bugs, reliance on external partners), and how are these risks mitigated? Provide any examples you can of large outages that have occurred, how long they lasted, and how you resolved them.

### Describe how the solution monitors and reports on system reliability and performance, and provide sample reference data or screenshots, as appropriate, of monitoring feedback.

### Describe what kind of scheduled down time, or “quiet time,” the solution requires, noting the frequency, duration and purpose. What tools are available to continue core functions during down times? How are jobs that are scheduled to run during down times handled?

### Describe the parameters of your “typical” Service Level Agreement (SLA) with a partner such as MSSA. How well does the solution meet those targets?

## Scalability and Performance

### Describe how the solution addresses the need to add new institutions over time, with the accompanying -- often immediate and large -- increases in users served and collections managed that such additions require.

### Describe how the solution manages peaks and spikes in workload over varying periods of time, including seconds, minutes and hours.

### Describe how the solution enables simultaneous batch operations across multiple institutions, including any limits on such operations.

### Describe the hard and soft limits on the number of records of various types which the solution can manage. What is involved in changing the soft limits?

### Describe the hard and soft limits on both the size of and the number of values in data elements within records of various types which the solution can manage. What is involved in changing the soft limits?

### Describe any performance vs. workload relationships inherent in the solution, citing specific examples. For example, if cataloging transaction load is higher than normal, does this affect search and display? How do you monitor and adjust the solution to address competing needs?

### Are there any restrictions or limitations on when certain tasks may be able to be run because of workload? What type of response guarantees do you provide at the server level?

### Are there limits to our growth or use of the system?

## Security and Privacy

MSSA will entrust an extremely large amount of critical data to the selected LMS. The solution must offer strong mechanisms for data backup and recovery and safeguards against data tampering and theft. In addition, the solution must allow MSSA members to manage data security and privacy at multiple levels: individual staff or patron user, single institution, subset of the consortium, consortium-wide.

### Describe data management practices to which the solution adheres, including those for patron and circulation transaction information. Include relevant information on standards compliance, such as ISO/IEC 27001:2013, PCI, and any organizational information technology audits that have been completed.

### Describe how the solution insures that identifiers that are unique within an institution are also unique across all institutions. Areas where this issue may manifest itself include but are not limited to item and patron barcodes, university identification numbers, and user names.

### Describe the solution's use of and support for secure protocols to safeguard data in transit.

### Describe the solution's support for encryption in backups and replica sets.

### Is data on your system encrypted in production mode, not just in backups or transfers?

### Describe how the solution prevents loss of data, and how it provides data recovery or rollback to specific points in time in the event data loss does occur. Also describe the process through which data is recovered. For example, is the recovery process a self-service mechanism? Or, must the customer contact your organization to request data recovery? What is the typical turn-around time to have data recovered? How compartmentalized is the data with respect to data recovery? In other words, can a customer recover a subset of bibliographic records, a subset of patrons, or a particular range of transactions? Or, is system recovery or rollback only possible in its entirety? Describe any experience you've had either practicing or implementing your disaster recovery plans.

### What protocols have been established for dealing with unauthorized access to or disclosure of confidential data?

### Describe the data validation the system performs on records as they are created or edited, and indicate whether this is different for batch jobs as compared to single records.

### Describe how changes are tracked to records (patron, item, bibliographic, etc.) Is there an audit trail or version control for edits? Is it possible to revert to previous versions of a record? Is the audit trail available for all records in the system or only a subset?

### Describe simultaneous edits to records by multiple users. For example, if a cataloger is editing an item record, can the circulation desk check out that same item, or is the record locked? If simultaneous edits are allowed, how are different simultaneous edits reconciled?

### Describe the security authorizations provided for fund management so that tight control of activity can be maintained. In addition, provide information on the change logging so that an auditor can examine all financial transactions recorded by date, time, and operator.

### Describe the architecture of data storage and redundancy (for example, multi-tenancy, cloud distributed, etc.). Describe the regional or global distribution of data centers.

### Describe how the solution protects patron privacy. How does the solution prevent patron data at one campus from exposure to system users on other campuses?

### What user or usage data do you share with third party platforms? Do users have the ability to opt-out of sharing data with third parties where possible (e.g. Syndetics, analytics tracking, etc.)

### Describe the extent to which the solution has been designed to comply with laws and regulations governing the storage and use of “protected” user data. Examples of such laws and regulations include: Michigan Library Privacy Act, Family Educational Rights and Privacy Act (FERPA), Health Insurance Portability and Accountability Act (HIPAA), and Payment Card Industry Data Security Standards (PCI-DSS). Describe what patron data are exposed in which components of the user interface. Describe how personal information about the patron such as address can be hidden from users in contexts such as a checkout desk.

### Does your solution require the use of JavaScript, cookies, or Java? Do you store authentication information in cookies?

### Do you store user passwords? If so, please describe how they are stored (e.g. salted and hashed, plain text, etc.)

### Describe how you ensure secure transmission of user names, passwords, search queries, and results/downloads to and from your system. Do you use HTTPS or another mechanism?

## Access to Data and System Functions

### APIs (application programming interfaces) frequently are used by individuals and institutions to fill gaps where local service demands are not met by the solution or provider. Describe the APIs you make available to users of your solution. What are your use policies for the API? Can end users access your API or just the library?

### Describe how the solution exposes data through documented web services and APIs, including supported data operations (read, write, update, delete, and so on). Describe any licensing or technical restrictions or constraints placed on the use of these tools and services. Are business rules and access controls applied? Does your system provide these APIs?

### Describe any licensing or technical restrictions or constraints placed on the use of these tools and services. Are business rules and access controls applied?

### Describe authentication mechanisms for interacting with the system’s APIs, and how API keys/credentials are generated, stored, and distributed.

### Describe how costs and fees are assessed if an institution requires additional development in order to integrate with third-party software.

### Can library data be exported? Is there any data that cannot be exported? What format can this data be exported in (e.g., text, CSV, Excel, MARC, etc.)?

### Describe how we can retrieve our data, if, in the future, we decide to migrate to another system.

## Authentication, Authorization, & Identity Management:

### Describe how the system can use existing identity stores, such as LDAP, Active Directory, Federated Services, etc., for both library staff and public user accounts. Describe how these capabilities can co-exist with identities natively managed within the proposed system. Describe how the system would handle multiple instances of an identity store from one institution, e.g. if an institution had two LDAP streams, one for faculty/staff and another for students.

### Describe how passwords for users natively managed within the proposed system are stored and secured (plain text, encrypted, etc.).

### Describe support for single sign-on authentication systems (e.g., CAS, Shibboleth, InCommon, and/or EZProxy).

### Describe workflows for loading patron records in an environment in which different identity management systems may be employed by different campuses using the system.

### Describe how staff administrative rights and staff accounts are assigned within the system. Can administrative rights and staff accounts be assigned to identities stored in external identity stores, such as Active Directory? Can administrative rights be assigned to groups, as well as users? Does the system allow compartmentalizing of administrative rights on a per-institution basis? For example, can you limit the effect of administrative rights assignment to a single institution?

### Describe how your system addresses group-based permissions for staff. Also describe any differences in what permissions and privileges can be managed for a group vs. an individual account.

### Describe the level of granularity of access controls for staff functions (principle of least privilege). Can certain data elements be made read-only for some staff and read-write for others? Can data elements be masked based on security level?

### Describe the dimensions by which patrons’ accounts can be personalized for them. For example, if data on a student’s major is present in a campus identity store such as Banner, can that data be used to automate recommendations based on his/her major, etc.?

### Does your system support two-factor authentication?

## Interoperability

### Describe how the system works with Automated Storage and Retrieval Systems (ASRS) such as Dematic or HK. Describe the ability to synchronize inventory data with these systems; how are new records loaded into the ASRS from the system, and how is the system updated with information from the ASRS?

### Describe the system’s integration with campus financial systems, as used for ordering, invoicing and other functions, as well as collection agency services; and ability to accept and process payments via cash, check, credit card, PayPal, Square, student campus cash cards, etc. Please provide examples of specific implementations.

### Describe how the system connects to campus information systems (e.g., Banner, Ellucian, PeopleSoft, etc.) to create and update patron records.

### Describe the ability to communicate fines and payment information to campus bursar systems, or the ability to indicate that fines and other charges have been transferred to the campus bursar system. Describe how campus blocks and holds due to fines can be communicated to central campus systems. For example, if fines are paid through a central campus bursar’s office, can the patron’s account be updated in real-time or through harvesting when payments are made through the campus office? Describe how the system can provide data to integrate library information in a campus portal or third-party systems.

### Describe how the system works with tools such as GOBI, Cataloger's Desktop, and RDA Toolkit. Describe procedures for automatically ingesting bibliographic record updating services (e.g., OCLC Bibliographic notification services, Backstage).

### Describe how the system handles batch loading and batch updating.

### Describe support for RFID Systems and vendor-led protocols such as 3M/Bibliotheca's SIP2 and self-check-out systems (e.g., 3M Self-Check, Bibliotheca Self-Check).

### Describe the system’s technical integration with content providers and various DRM systems: e.g., Overdrive, Adobe Digital Editions, Adobe Content Server, Ebrary, Safari, iLibrary, EBSCO

### Describe the technical integration with copyright and rights management services: e.g., SipX, Copyright Clearance Center (CCC), Get it Now.

### Describe compatible label printer brands (e.g., RapidX, Zebra) and printing formats (e.g., postscript).

### Describe how the system may be used to integrate library data (such as title lists, reserve lists, account information) into learning management systems such as Moodle, Blackboard, and Canvas; as well as for content management frameworks such as Drupal and WordPress; and guide management systems such as LibGuides.

### Describe the ability to create and customize RSS feeds and other feeds of data (e.g., feeds of data for use with Twitter/social media APIs) that can then be embedded in web pages/LibGuides. Describe how long RSS feeds are stored before they expire. Describe the ability of users (e.g., students, faculty) to create and subscribe to RSS Feeds.

### Describe how library data is made available for indexing via commercial search engines (e.g., Google and Google Scholar) and how the system enables discoverability from outside the system’s own discovery layer.

### Describe interoperability with video streaming software such as Ensemble Video. Describe how metadata and rights information for streaming / media resources is managed and harvested.

### Describe the ability of customers to develop add-on or extension functionality that directly modifies the functionality in the system. In other words, apart from APIs, is there a way to write scripts or functions that modify functionality within the system itself? Or is there a process for submitting such enhancements for code review for eventual inclusion in the system?

## Migration and Implementation

### Describe the estimated timeline for migration and implementation of your solution and the major steps in the project. Provide a detailed description of your approach and proposed plan for the data migration process.

### Describe the typical amount of downtime for their current systems that MSSA libraries can expect during the migration. Is expected downtime based on institutional size, number of patron or bibliographic records, or other applicable metric?

### Describe your previous LMS and ERM/link resolver migration experience.

### Describe your experience migrating data from Innovative Interfaces Sierra/Millennium and Ex Libris Voyager. Describe any specific considerations or difficulties in migrating bibliographic, acquisitions, serials, check-in, electronic resource, content license, patron and circulation records and data from these systems into your solution.

### Describe the ability to retain and preserve transient or temporal data, such as checkouts, holds, item status, item statistics (such as total checkouts), patron status and patron blocks, through the migration process.

### Describe the ability during migration to identify duplicate records and merge them, preferably without loss of locally created data. Describe the solutions or rules available for identifying duplicates and creating a single, combined bibliographic record based on information present in bibliographic records drawn from different instances.

### Describe the ability during migration to handle and resolve duplicate barcodes.

### Describe the preparation and implementation steps necessary to ensure appropriate migration of data (bibliographic, acquisitions, item, holdings, license, etc.) and to avoid data loss, the need for data clean-up projects, and related problems.

### Describe information required from non-library campus units, such as information needed from campus IT departments regarding LDAP and identity management. Provide examples of forms used to collect this information where available.

### Describe all validation routines that migrated data of all types are subject to. What happens when records fail validation during the migration process? How are records that fail to load documented (whether due to validation non-compliance or for any other reason)?

### Describe the solution's ability to migrate data and content from repository platforms such as, but not limited to, Fedora Commons, Islandora, Digital Commons, and DSpace. How are access policies retained during the migration?

### Describe the training options available during implementation for a consortium of our size.

### Describe additional training needed to access any part of the system.

## Support, Maintenance, & Enhancements

### Describe the requirements for central consortium staff to manage your solution. Include the number of staff, anticipated number of hours per week, and types of tasks normally performed by central staff.

### Describe your customer support venues (e.g., web, phone, email), periods of coverage specifying time zone, and expected response times.

### Describe how your customer service system tracks and responds to issues.

### Describe how the system reports transactional and other errors so that staff may take action on them.

### Describe the system documentation, including format, accessibility, and ease of use. Describe how updates and documentation are distributed (e.g., listserv, document center, etc.).

### Describe the content and delivery method (context-sensitive, online, knowledge base, etc.) of administrative and end-user documentation sets, as well as the frequency of documentation updates. Also describe the availability of user-authored content, such as community wikis.

### Describe your customer support model. In a consortium model, do you accept support requests from any consortium member library or only from consortium central staff? Do you provide a primary contact(s) for a given customer account, or do you provide support by geographic region, or by area of specialty (e.g., circulation, cataloging)?

### Is there an active user group for your product? What is their scope and role? Describe any customer community activities you sponsor or support, such as online or in-person venues to allow customers to share ideas and systems. Include information about annual conferences and attendance, and regional interest groups (particularly in Michigan).

### Does the user group have an active community of programmers and developers adding functionality to the system? What is the process for sharing custom developed add-ons or scripts with other users of the system?

### Describe the product enhancement process and the role that customers and end users play in identifying and prioritizing new features and enhancements. Describe any changes or updates you have made to your system in the past year as a direct result of customer feedback. Describe typical time frames for items on a development road map (e.g., quarterly, 6 months, etc.)

### Describe the process of escalating support requests. What are the levels of severity/importance for support calls? Describe the 24/7 support response for critical problems (e.g., system outages).

### What enhancements are planned for development over the next 24 months?

### Describe the frequency and scope of both major and minor releases. How long do you support a major platform release after it has been superseded by a new version?

### Describe the availability of training for systems staff and systems administrators at each institution. Describe the various levels of training for staff according to technical expertise. Provide examples of configuration changes that can only be accomplished on the vendor side and cannot be completed by staff at each institution.

### Describe the support (including documentation and online forums) provided for APIs and web services that enable the customer to extend management system functionality. What browser software do you support?

### Describe average turn-around time for support problem tickets.

### Describe your process for making available information about known issues and status updates toward resolution.

## System Customization

### Describe the operating systems (e.g., Microsoft Windows, Apple OS X, Linux, Apple iOS) that staff can use with the solution. Describe any functional differences or limitations that might exist for particular platforms. What is your browser support policy?

### Describe how your solution is accessible (Section 508, Web Content Accessibility Guidelines 2.0 compliance) to users with disabilities. Describe your solution’s support for assistive technologies such as screen readers. Is it practical to use your solution with such technologies? Identify any areas of functionality that, owing to the complexity of the interface or for other reasons, are less effectively used with assistive technologies.

### For public facing functions of your solution, describe your support for devices other than desktop and laptop computers, e.g. tablets, smart phones and other mobile devices, and how you achieve this support, e.g. through native apps for the devices or through responsive design.

### Describe the branding and customization options that will be available to libraries at the local level, including capabilities for setting default options. Do you allow libraries to customize the HTML templates? The CSS? Can libraries add their own JavaScript?

### Describe the ability to customize the public interface.

### How does the system handle the integration of locally created scripts?

### How are upgrades performed, including feature enhancements, general updates, and bug fixes? How will these affect any local customizations?

# Resource Management

MSSA seeks a solution that will improve efficiency and streamline workflows in the technical services operations of its member libraries. The solution must support the acquisition, description, management, and assessment of library resources in all formats, both physical and electronic. There must be seamless integration of internal staff functions within the software and seamless integration and interoperability with external campus and library systems. The solution must support metadata in non-Roman scripts and future metadata frameworks and schema.

Because MSSA has not predetermined whether this project should result in a single shared implementation of the selected library management software or a group purchase of multiple, independent instances of the same software at the individual participating libraries, responses to this section of the RFP should make very clear how this eventual decision will affect potential workflow efficiencies and opportunities for collaboration in managing resources within the consortium. In particular, vendors should describe advantages and disadvantages of shared vs. separate bibliographic, acquisitions, vendor, and electronic resource management (ERM) records/databases. Responses should also detail any loss of local information and customization options that a single, shared system might entail.

## Collaboration

### What workflows can be integrated across institutions to avoid repetitive data management?

### Describe the process of batch loading of records by MSSA libraries into the shared system. How will duplicate records be avoided if multiple institutions purchase the same record sets? How will designated fields be protected from overlay? How will these records be displayed in a shared environment?

### What records can be shared across institutions to streamline workflows (bibliographic, authority, order, check-in, item, license, patron, fiscal, vendor, etc.)? Describe how dynamic or flexible record sharing is, and the ease or difficulty of changing sets of records from local control to shared control.

### How does the solution support the ability of libraries to do cooperative collection development in a shared environment through access to common files of on-order materials, check-in records, etc.? In a shared environment, how can member libraries become aware of what other libraries are purchasing either from individual vendors or from specialized approval plans? Would the solution allow member libraries to be notified automatically when another library cancels a publication to which both of them subscribe?

### Describe how your system supports shared print projects, such as the Michigan Shared Print Initiative (MI-SPI) and the ways that other groups have used your solution on their shared print projects. For more information about MI-SPI, see its website at <http://mcls.org/engagement/mi-spi/>.

### Describe how each institution will handle local information (e.g. binding information, donor information, processing notes, etc.) in a shared environment.

### Describe how the solution would allow for the management and maintenance of a shared bibliographic and authority control file.

### Describe your method of managing bibliographic records in a shared cooperative arrangement (i.e., are members required to share bibliographic records?  Can each institution maintain their own set of records?  Can there be a mix, with some shared records and some individual records?)

### Describe how the solution would handle access to electronic resources in a shared bibliographic environment where libraries may have different contractual arrangements with the same vendor. Where would individual links to electronic resources be stored and displayed in a shared environment? How would they display to the public?

## System Integration (workflow from selection to circulation)

### Describe the solution’s integrated workflow from the point of material selection to circulation. How do materials move through the library pipeline?

### Describe the interaction between the e-resource component and the other functional system components (acquisitions, interlibrary loan, fiscal, public interface, etc.).

### Describe how the solution supports the integration of interlibrary loan and acquisitions to support purchase-on-demand programs.

### Describe the local options for customizing the integration of workflows (for example: Can the system support multiple cataloging queues? Can the solution support multiple labeling queues?) Describe the system’s support for workflow tracking such as automated reminders or alerts.

## Acquisitions Management

### In general, describe how the solution supports the acquisitions workflow, including, but not limited to, ordering, receiving, invoicing, claiming, payment, etc. Describe how order data is stored in relationship to bibliographic and item data.

### Describe the ability for both staff and public patrons to make Purchase Requests through the System.

### Describe the solution’s support for Demand Driven Acquisitions (DDA) of ebooks and media.

### Describe the solution’s support for automated selection, ordering, invoicing, and claiming, using standards like EDIFACT and X12. Can these transactions be completely automated? How is data sent and received in this manner integrated with acquisitions and financial modules? How does the solution check for duplicate records?

### Describe how the solution verifies local holdings (for a single library or a defined group of libraries), based on ISBN/ISSN, before placing a new order, with notification of potential of duplicates.

### Describe the solution’s ability to import bibliographic records individually or in batches from a vendor, including, but not limited to, the automatic creation of order, invoice, and/or item records from data supplied by the individual institution.

### Describe the cross functionality between the Acquisitions module and others (Cataloging, Serials, ERM).

### Describe the ability to create templates for orders and receiving record creation.

### Describe your solution’s support for ordering and claiming, including, but not limited to, print and electronic submissions and what electronic submission protocols are supported.

### Describe how the solution supports the creation of brief bibliographic records for ordering purposes, if there is no bibliographic record available. Conversely, describe how the solution supports non-purchased materials, such as gifts or government documents that require a bibliographic record but do not necessarily have an order or invoice.

### Describe the fund structure for acquisition payments and the invoice creation and payment workflow. Is there a limit on the number of funds? Can multiple funds be used to pay for a single order?

### Describe the ability to track encumbrances, expenditures, and fund balances. Describe system notifications when funds are nearing zero balance or are overspent.

### Describe the solution’s support for storing and sharing vendor data and how it is used in different functional areas.

### Describe the solution’s ability to integrate with campus/state financial systems, including, but not limited to, export and import of financial transactions such as payment of invoices by various methods.

### Describe the solution’s financial reporting functionality, including, but not limited to, granularity of data retrieval and level of local and consortial customization, without intervention by solution vendor.

### Describe the solution’s support for fiscal year closing functionality. Will the solution be capable of closing by a variety of fiscal year options (for example, biennium versus calendar year)? In what format and for how long can fiscal close records be retained?

### Describe the ability to reassign monies and carry forward to a new fiscal year.

### Describe the records or data that are stored in the solution from acquisition processes. How long is this data retained? Can individual institutions choose custom retention periods for specific kinds of data? What kind of audit trail is available? Are reports available in print and electronic formats for storage? For how long are reports available?

### Describe how the system handles shipping/handling and shelf-ready processing charges.

### Is there a mechanism for additional line items on an invoice?

### Describe the solution’s support for generating statistics from acquisitions records. Describe data which is not available to be reported out. Describe how data can be extracted across record types, including, but not limited to, order, vendor, item, and bibliographic records.

### Will the vendor migrate any historical payment information to the new system, and if so, how far back? If not, how does the vendor suggest to store or archive this data?

## Serials Management

### In general, describe the solution’s support for material management at the issue level, including receiving, item generation, labeling, routing, claiming, and binding.

### Describe the functionality of identifying and collapsing serial binding units. Does the solution provide automated alerts for serial binding?

### Describe the solution’s support for the creation of date prediction patterns and enumeration patterns for check-in purposes. Describe the solution’s ability to reuse prediction and enumeration patterns. Describe how the solution supports externally supplied check-in data, for example data coded in bibliographic MARC tag 891.

### Describe the solution’s support for the check-in of multiple instances of a given title; for example, one subscription to a title might include individual issues, bound volumes, pocket parts, pamphlet supplements, legislative service, and possibly other parts, each received on a regular or irregular basis. Describe how each of these parts can be accommodated and distinguished, either within a single record or on separate records.

### Describe the solution’s support for recording and receipt of issues via SISAC and/or UPC codes.

### Describe the solution’s integration of serials claiming across workflows and ability to claim through EDI.

### Describe the solution’s support for current MARC 21 holdings record standards. Specifically, describe how the system’s serials check-in system can automatically update the MARC 21 holdings record, including all content related to the 85X/86X paired fields, either during receiving or as a separate function.

### Describe system support for generating statistics from serial records (number of active subscriptions, number of pieces received, etc.).

### Describe how the solution generates binding preparation reports or reports which facilitate preservation assessment.

### Describe system support for managing bulk import of serials records and holdings information specifically for electronic resources.

### Describe the methods and formats for exporting binding information to a file and the method for generating binding information from the solution to send electronically to a vendor, including the interaction with bindery software. Describe which bindery communication protocols are supported.

## Electronic Resource Management

MSSA has a robust consortial purchasing system in place for electronic resources. This includes both individual electronic resource purchasing, negotiated by the consortium, and ownership of electronic resources as a group. Individual institutions also negotiate and purchase products on their own. A successful solution will be able to support all three of these models and will provide tools for managing information associated with these purchases, both individually and consortially. The solution must support existing national and international standards for electronic resource management.

### Describe the creation of an electronic resource record. Can these records be created at different hierarchical levels to support electronic resource package and combination purchases? Can these records be created at the local and the consortial level? How do these records link to license documents and information? Describe how electronic resource records comply/do not comply with the Digital Library Federation Electronic Resource Management Initiative’s (DLF ERMI) data elements.

### Describe the solution’s ability to support creating, updating, storing, displaying, and reporting internal and/or public notes for electronic resource management records.

### Describe the knowledge base associated with the Electronic Resource Management System (ERMS). Is this knowledge base local or consortial? Describe how the knowledge base works with OpenURL resolvers and how it integrates with the electronic resources functionality of the system. How often are resources added to or updated in the knowledge base? What is the process by which a customer can request a resource be added to the knowledge base? Can local and/or consortial customers batch load custom information into the knowledge base? Describe that process. Where can a potential client see a full list of resources included in your knowledge base?

### Does your product use KBART (Knowledge Bases and Related Tools) endorsed information? What percentage of the resources in the knowledge base have data populated from KBART files? Describe the solution’s process for updating title lists if KBART files are not used? How often are title lists updated?

### Describe the solution’s support for the management of license agreements, for local and consortial purchases. Can a scanned copy of a license agreement or other related documents be stored in the solution? What fields are available for license terms, and how can these be exported and integrated into other areas of the solution? Can license terms be customized for the local and consortial level? What reports can be run from license terms?

### Describe the solution’s ability to manage administrative information for electronic resources and contact information for vendors and publishers. Different members of the consortia may have different contacts. Can contact information be customized for the local and consortial level? What reports can be run from administrative information?

### Describe the workflow management available for electronic resources, including renewal reminders, trial expiration, etc. Can local instances of the software create and manage custom workflows in a consortial environment?

### Describe the solution’s OpenURL resolver. If there is no integrated OpenURL resolver, describe the solution’s interactions with third-party OpenURL applications.

### Describe the solution’s ability to ingest and manage usage statistics for electronic resources at the local and consortial level. Can these statistics be reported out at both levels in a flexible customizable format? Does the solution offer a usage statistics gathering option? Does the statistics gathering functionality use the SUSHI (Standardized Usage Statistics Harvesting Initiative) Protocol? How does the solution gather non SUSHI statistics? What other metrics does the solution offer for review of electronic resources?

### Describe the solution’s ability to output electronic resource records in customizable ways for integration into library web spaces, institutional repositories, etc.

### Currently, each institution within the consortium manages its own electronic resources and frequently these resources are not available to users at other institutions. Similarly, items in digital repositories may be subject to access restrictions imposed by the creator or the holding institution. How will your solution clearly expose the resources a user has the right to access and connect users with the appropriate electronic or digital resource? How might this experience differ if a user is on or off-campus?

## Collection Maintenance

### Describe how the solution supports the processing of physical materials including support for spine-label printing either through the solution itself or via a third party solution. How can these processes be scaled at the consortial level as well as locally managed? Also, describe the process for customizing multiple label layouts and printer options.

## Description and Metadata

MSSA seeks a solution that supports user tasks to find, identify, select and obtain resources. The solution must support multiple historic and future standards for description in multiple frameworks, provide reliable and flexible importing and exporting of records, support cataloging in non-Roman scripts, and provide support for both shared and local metadata. The solution should also support future metadata frameworks and schema, reporting functionality that facilitates the extraction and manipulation of data by the institution(s), and the capacity for extensive interoperability with external systems.

### The solution must be capable of importing and exporting bibliographic, holding and authority records in MARC 21 Format and future frameworks.

### Describe how the solution provides for display of all valid and invalid MARC content designators (field tags, subfield codes, indicators) in staff view and suppresses display of codes in patron view. Describe how record display is handled for all aspects of the solution, including, but not limited to: staff workstations, public interface, Web browser, and mobile devices and platforms.

### Describe how the solution manages multiple classification schema and subject vocabularies including, but not limited to, Library of Congress Classification and Subject Headings, Dewey Decimal Classification, SuDoc classification numbers, local classification schema, National Library of Medicine Subject Headings, and LC Genre Form Terms.

### Describe the solution for inputting characters in non-roman scripts, e.g. Chinese, Japanese, Korean, Cyrillic. Describe how ALA diacritics are stored, displayed and input. Describe how diacritics display in the public interface. Include any specific requirements for peripheral hardware or software to ensure this support. Describe how the solution supports display of Unicode characters in all screens of the solution.

### Describe the solution’s support for bidirectional cataloging and support for bidirectional script display (e.g. Arabic, Hebrew).

### Identify all metadata schemas that are supported and describe how they are implemented. Describe any conversion tools or utilities that will translate from one metadata schema to another.

### Describe how the solution accommodates multiple content standards and encoding schemas including, but not limited to, Encoded Archival Description; Metadata Object Description Schema, Dublin Core and BIBFRAME. Describe plans for incorporating future containers, such as BIBFRAME or equivalent, alternative vocabularies and cataloging description methods.

### Describe how the solution supports unique local data needs within a consortial environment of shared records. Review how the solution will support and protect local notes, access points, classification schemes, and other unique metadata while synthesizing it into a consortial database.

### Describe how the solution supports adding local holdings, such as new items (copies, volumes) to existing records, manually or in batch.

### Describe plans for implementing Resource Description and Access including adjustments to the MARC framework, and how the solution will incorporate those changes to enhance the user experience.

### Describe how the solution supports the loading of MARC record sets from vendors such as Serials Solutions, Alexander Street, or others for electronic resources and how local access to the resource is maintained.

### Describe how your system interacts with records and finding aids created by systems such as Archivists' Toolkit and ArchivesSpace, and Archon. Can these records be imported or harvested into the system?

## Holdings Management

### Describe the solution’s support for holdings records which are fully compatible with current MARC standards including the export and import of holdings records for both serials and monographs.

### Describe the solution’s support for the ability to define multiple holdings locations and sub-locations, both consortially and locally.

### Describe how local and consortial holdings are set in WorldCat for all library resources.

### Describe the solution’s support for linked records. For example, items bound together with separate bibliographic records but shared holdings/item records.

## Authority Control

### Describe how the solution supports current standards for authority data and allows all relevant bibliographic fields to be authority controlled without intervention by solution vendor. Describe how the system identifies which fields can be controlled.

### Describe how the solution will allow the management and maintenance of a shared authority file.

### Describe how the solution manages the import and export of authority data with one or more authority vendors.

### Describe the default authority control practices and the ability to customize these practices.

### Describe how the solution manages and displays cross-references. Describe how locally created cross-references will be preserved and displayed.

### Describe how the solution supports unique persistent identifiers and linked data applications.

# Circulation and Resource Sharing

MSSA seeks a robust and flexible system to enable efficient, transparent circulation and resource sharing among all member libraries of the consortium, as well as integration with MeLCat and other extra-consortial borrowing and lending workflows, including interlibrary loan. We desire an “any time, any patron, any library” circulation model within a complex consortial environment consisting of academic libraries of various sizes. To this end, the consortium anticipates the need to implement circulation rules at the local, consortial and extra-consortial levels.

MSSA seeks a system that facilitates multiple modes of communication between the system and staff, the system and patrons, and between libraries.

MSSA seeks a system that ensures data privacy and security of patron records. Only data functionally necessary to perform a transaction should be available during transaction processing.

MSSA members utilize empirical data to optimize services and workflows. MSSA requires a system capable of delivering statistical data and metrics in a timely and actionable manner.

## Administrative

### Describe the ability to view, edit and manage lending rules.

### Describe the ability to tailor staff interfaces to individual needs.

### Describe how staff permissions can be assigned to groups or individuals.

### Describe the ability to set up permissions so that edits can be tracked by date and staff making edits.

### Describe how easy it is to move between system functions.

### Describe how the system integrates lending rules with library hours and closures.

### Describe the ability to easily allow for input of a days closed table to determine due dates.

### Describe the flexibility in setting loan/overdue/renewal periods such as an hour loan, but with an overdue fine period calculated in minutes.

### Describe the process for making changes to circulation parameters and how they take effect, e.g., in real time vs requiring a system restart. If any specific parameter change requires a system restart, please provide details.

### Describe the allowance for a variety of shortcuts and/or creating macros.

### Describe the permissions assigned to qualified staff to edit circulation parameters/privileges.

### Describe the flexibility of circulation parameters and all related rules (setting & updating).

### Describe how coexistence of local and consortial lending rules work including the capability to customize lending rules.

### Describe the management of circulation transaction alerts and overrides.

## Check-In/Check-Out/Renewals

### Describe the support for customized online and print receipts as circulation confirmation.

### Describe the ability to handle on the fly creation of patron and item records at checkout.

### Describe the support for smooth local circulation workflow.

### Describe the capabilities to customize fine tables, backdating check-in and override for exceptions when dealing with consortial lending.

### Describe the ability to provide necessary levels of staff access/permission to borrowers' data.

### Describe the ability to add notations in item records during borrowing and lending transactions.

### Describe the ability to track location updates for items with "in transit" status.

### Describe the ability to update item availability status (e.g., Missing, Repair, Lost, Lost & Paid, etc.).

### Describe the ability to customize circulation "pop-up" messages in both patron and item records.

### Describe the ability to determine/provide loan periods and renewal policies when dealing with consortial lending without interfering with local loan, renewal, and hold policies.

### Describe renewal functionality, including system generated, staff initiated and patron initiated.

### Describe the flexibility of renewal functionality, policies, and limits that are set based on patron types and material types at both local and consortial levels.

### Describe the supported mechanisms to scan or read material and patron identifiers (e.g. barcodes, RFID tags, mag stripes, etc.).

### Describe the support for offline circulation transactions for both local and shared system. (Describe how the basic circulation activities are performed/are able to continue between local site and member libraries when the system is affected by down time at one site or multiple sites, e.g., checkout, check-in, renewal.)

### Describe patron self-service features, including self-service for such activities as holds, bookings, renewals, notice preferences, self-updates of patron information, etc.

### Describe how the system integrates with self-checkout systems, automated. material handling systems, and automated storage/retrieval systems.

### Describe the hold/hold shelf management capabilities of the system.

### Describe the ability to make items non-requestable.

## Resource Sharing Within Consortium

### Describe the borrowing and lending workflow of an item-level request made by a consortium patron, including delivery of the item to the patron at the patron’s specified pickup location; circulation of the item to the patron; and return of the item to its home library.

### Describe how the system determines due dates and hold priority at the consortial level given numerous global and library-specific shelving locations, categories of patrons, and material formats. How does the system honor local lending periods when lending to a consortium member library?

### Describe the tools available to manage and balance borrowing requests across member libraries, to target outcomes such as workload fairness and speed of delivery. Include information about how quickly load balancing changes take effect.

### Describe the mechanisms for tracking items in transit for delivery from and to their home libraries.

### Describe how the system manages consortial circulation of and access to licensed electronic materials, such as e-books and e-journals.

### Describe how the system can handle on-demand scanning of local materials requests, such as book chapters or archive materials.

### Describe the ability to generate shipping labels and paging slips.

## Interlibrary Loan (Resource Sharing Outside Consortium)

### Describe how to integrate request data from other library systems (e.g., ILLiad, RapidILL) so that patrons can:

#### view outstanding requests

#### have materials circulated from the external system via their patron account

#### renew items

#### view accrued fines

#### pay fines

### Describe how the system interoperates with other circulation platforms, including traditional interlibrary loan systems (ILLiad, RapidILL, etc.), for the delivery of electronic and physical materials of items not owned by the consortium.

### Describe the ability to create, update, and automatically delete temporary circulation records for ILL items coming from a non-consortial library.

### Describe how the system integrates with ILLiad (and other ILL systems) for requesting un-owned items using Single Sign On.

### Describe any copyright and licensing agreements, procedures, and compliance tracking that your system offers.

## Course Reserves

### Describe activation and deactivation of course reserve items and lists.

### Describe the Course Reserves functionality (both print and electronic), including the ability to cross-link courses and items and to suppress temporary items.

### Describe the Course Reserves integration with the catalog/discovery layer. Can course number/instructor be searchable from catalog/discovery layer? What other fields can be searched?

### Describe how patrons access Course Reserves materials online, including electronic materials and information about print materials.

### Describe how the system handles the relocation of items from a permanent collection location to a temporary Course Reserves location.

### Describe the creation of physical and electronic/digital item records specific to Course Reserves. What are the supported file formats for electronic reserves?

### Describe how the system supports integration of Course Reserves with learning management systems (e.g. Canvas, Blackboard, Moodle)

### Does the loan period display in the course record in the discovery layer and in the item record?

### Describe how the system stores “On Reserve/Date - Off Reserve/Date” history in the records of library owned items. Does it retain course information as part of this history?

### Describe how the system allows faculty instructors to request Course Reserves Items. Can this be done through the discovery layer?

### Describe how third-party rights management software can be integrated with Course Reserves.

### Describe the ability for access to electronic course reserves items to be password protected or otherwise secured.

## Patron Management

### Describe integration with the campus Enterprise Resource Planning Software (e.g., Banner, Ellucian, PeopleSoft, SAP) for patron management (seamless integration in real-time vs batch loading).

### Describe creation, content, and customization of patron records. How does the system track changes to patron records?

### Describe how the system supports patron record loading and field protection in existing patron records.

### Describe the process for merging duplicate patron records.

### Describe how the system integrates with third-party ID card systems.

### Describe what data (in addition to text) can be attached to patron records.

### Describe automatic and manual blocks of patrons from borrowing and other services both at the consortial and local level.

### Describe patron access to services at multiple institutions while maintaining a primary affiliation.

### Describe how to allow management of affiliated patrons (alumni, community borrowers, etc.) who have local privileges, but not consortial privileges or remote access to licensed databases.

### Describe how the system accommodates multiple patron statuses for the same person.

### Describe the ability to update patron records both individually and globally.

### Describe the ability to export patron data to external systems.

### Describe the ability to tie multiple patron accounts together for "proxy borrowing."

### Describe how the system manages a change in patron status (e.g., undergraduate student becomes graduate student or becomes employee)

## Collection Management

### Describe the inventory/collection management tools available in the system.

### Describe the mechanisms for Floating Collections.

### Describe the mechanism to do mobile inventory/shelf reading/in-house use counts.

## ILL Integration (with MeLCat)

MeLCat is Michigan’s statewide resource sharing system. It is currently built on Innovative Interfaces INN-Reach system. A description of the MeLCat architecture is in Appendix 3.

### Describe how the system interfaces with the Innovative Interfaces INN-Reach system. Specifically address:

#### Patron authentication.

#### Patron notices (pickup, overdue, cancellation, etc.).

#### Creation of temporary bibliographic and item records for borrowed items.

#### Automatic deletion of temporary bibliographic and item records.

#### Ability to track materials lent to other libraries via INN-Reach .

#### Methods for providing bibliographic and item-level holdings information to the INN-Reach union catalog.

#### Methods for providing bibliographic and serials summary holdings information for inclusion in ArticleReach, the module with INN-Reach for interlibrary loan of non-returnable items.

#### All other INN-Reach-based consortia with which the solution is currently working. For each, provide:

##### Details of the method of integration (e.g., NCIP, API). (If any aspects of the integration are not yet complete, provide specifics including delivery date).

##### Date when the integration work was completed.

## Billing and Payment

### Describe the options to generate and communicate bills and fees/fines notices.

### Describe the ability to globally purge and/or waive bills and fines.

### Describe the abilities to keep a detailed history of all bills and fines.

### Describe the capabilities to easily transfer bills and fines via a feed to the Bursar/Receivable Accounting Office.

### Describe the integration with existing campus financial systems for processing payments. Can adjustments be made in real time?

### Describe the options to generate fines and bills by locations.

### Describe the ability to customize notices to communicate with local and consortial patrons.

### Describe the allowance for all types of payments including online payment options.

### Describe the capabilities to set billing codes as well as options for types of payments.

### Describe the ability to edit, update and undo payments.

### Describe the ability to determine staff levels of access/permission to payment information and billing records.

## Booking and Scheduling

### Describe the booking/scheduling capabilities for rooms, equipment and materials.

### Describe the ability to book materials for use on a specific date and time.

### Describe the ability to allow at least a 12-month advanced room booking.

### Describe the capabilities to cancel single and/or batch reservations and limitations on booking.

### Describe the ability to send email notifications of updates and confirmations within the system.

### Describe the ability to generate and export data/statistics about booking and scheduling.

## Communications and Notifications

### Describe the various types of notices and print products (receipts, paging slips/lists, book bands, hold shelf tags, pickup and overdue notices).

### Describe the ability to customize, design, and brand print and electronic notices (templates).

### Describe the types of automated patron notifications the system provides (e-mail, SMS, etc.).

### Describe circulation events that trigger notices.

### Describe the ability to schedule generation of notices.

### Describe the ability for staff communication (local and inter-institutional) about individual transactions (message alerts in records, as an example).

# Discovery

## General

### Describe how your solution will provide library users with an intuitive interface that searches disparate resource silos (e.g., local returnable and/or digital collections, vendor-supplied electronic resources, manuscripts and archival material, etc.); enables users to create searches in their own words; retrieves relevant items available to them regardless of format or physical location; and displays, organizes, and limits search results in an understandable manner.

### Describe how your solution will enable users to control the scope of or refine a search by criteria such as availability, location, creation or publication date, version, resource type, or format, as well as whether the item is available electronically or not.

### Describe how your solution's user interface communicates the difference between content that is available in full text (electronic or print) and unavailable in full text (electronic or print).

### Describe how your system indicates to users when items are subject to embargo and may not have full text available?

### Describe how your system will pass searches on to other search platforms, e.g. MeLCat or WorldCat.

### Describe how your solution will facilitate both known-item searches and open-ended searches (including authors, titles, subject terms, or other identifying information) using an intuitive interface. How do you handle searches with a specific scope, such as the library’s archives, or a specific collection?

### Describe how your solution displays holdings for multi-volume or serials holdings. Do libraries have the ability to customize how these holdings are displayed?

### Describe how your solution displays FRBRized results to users.

### Describe how your solution will facilitate expert/advanced searching features for researchers who require more control in formulating search statements and handling results. How does your solution handle Boolean searching?

### Describe how your solution will enable users to change search terms without losing selected search parameters and limits.

### Describe how your solution integrates eBook discovery into search results. How are these titles accessed from the discovery system?

### Describe your knowledge base. Provide a listing of those databases, publishers, open access repositories, and other data sources that are indexed by the discovery system and the level of indexing, e.g. metadata or full text.

### What level of control will each campus have over the indexing of local catalog and digital collection records? Can individual libraries customize searches with custom scopes such as searching journal titles, reference books, or new books?

### Describe how your solution recommends subjects or other terminology, alternate titles, spelling corrections, and other ways to help users identify and use alternate search strategies.

### How does your solution expose library resources to the web?

### What supplemental and contextual information will your solution provide about items such as book covers, tables of content, indexes, reviews, and other content previews that enrich the user’s understanding of the nature and content of items and collections? Do these features require additional services from you or another provider?

## User Experience

We envision a shared solution whose end-user interface should be Section 508 compliant, accessible from multiple devices, and subject to periodic, structured evaluation. The solution also should allow libraries and individual library users to integrate external systems and services such as electronic resource vendors, web content management systems, learning management systems, and chat reference.

### Describe how your solution will enable users to discover the availability, status, and location of specific resources, including real-time availability.

### Describe how your solution connects users with full-text from the discovery interface.

### Describe how your solution will enable users to access their own accounts in order to view, renew, and track requested or checked out tangible items from local or consortial library collections.

### How will your solution enable users to create and save, print, share, or export single items or lists of items to citation management, word processing or other productivity software?

### Does your solution offer usable permalinks for each record? Please share an example of a permalink from your system.

### Describe the help available to users from within your solution’s interface. How will you respond to users who contact you directly for assistance?

### Describe how your solution might enable users to set and receive alerts and notifications about the status of specific items or categories of items available to them through an intuitive interface.

### Describe how users can be notified of new content items in the index (new articles published in journals, new content added to the index).

### Describe how your solution handles non-English languages, and the input and retrieval of records with special characters.

### Describe how your system handles sessions and session time-outs. Can the time-out length be customized? When a search times out, is the user also logged out from the session?

### With the current proliferation of browsers and devices, the user experience should be platform agnostic so that it works regardless of mode of access. Describe how your end-user interface will meet those user needs. Are all functions available to all users, regardless of device used to access?

### Describe how you approach evaluating and improving the usability and accessibility of your solution.

### Describe how your solution will enable interoperability with local online reference services (e.g. chat reference), social networks, external subject guides, and other electronic services for communication between library users and staff.

### Describe how users might interact with the solution through tagging, recommending, or writing reviews of resources.

### Describe your company’s policies on backing up, recovering, and purging user supplied data. For example, how might you handle a user who has accidentally deleted a resource list created in your solution? How would the solution handle a user who no longer wants information they contributed to be available through the solution?

# Analytics

Any successful library services platform must enable libraries to make informed, data-driven decisions. Analytics capability must also illustrate promise for future enhanced data collection and functionality, such as comparing resource usage across formats, identifying the usage of library resources via links in LMS systems, and more.

## Systems

### Describe and list the solution's native reporting capabilities including the suite of standard reports you provide and their coverage areas, e.g., bibliographic, order, circulation, workflow, patron, etc.; support for user-created custom and ad hoc reports; report scheduling and automation; and the methods of delivery and routing. Describe any limitations on reporting capabilities such as constraints on report scheduling.

### Can external reporting tools such as Crystal Reports, Hyperion, or Microsoft Access be used with your solution? Describe the limitations, if any, of the data made available to external reporting tools. Describe how access to the data is secured. Describe how access is linked to a user’s account such that users are able to query through this interface only the data they are permitted to view. Describe how the data are documented and/or the training provided to help users construct valid and useful reports using external reporting tools.

### Describe your system's dashboard and data visualization capabilities.

### Describe how your system supports the generation of reports for external agencies such as IPEDS, ACRL, etc.

### In a consortial environment, individual libraries often need to create reports based on data about their collections and patrons. Describe how your system supports creation of such reports and how individual libraries can get separate data from the aggregate.

### Describe how other library data can be uploaded into the system to cross tabulate with system-generated data, e.g. library door-count statistics, reference desk statistics, analytics from a platform such as Springshare, etc.

## Circulation

### Describe the array of circulation variables about which the reporting tools can gather statistics (e.g., flexible date ranges, call number ranges, patron type, material type, title, material location, type of use).

### Describe any limitations on the circulation reports (e.g., combinations of variables, date ranges).

### Describe the ability of the solution to retain 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. Specifically address the following types of transactions: checkout, renewal, check-in, number of holds placed, number of holds filled.

### Describe any impact data retention periods may have on the ability to filter, sort, and analyze circulation data. (e.g., where the transaction took place, day of the week, hour, all fields in the patron and item record.)

### Describe the ability to report local paging requests by patron type, item location and item type separate from filled hold statistics.

### Describe the fine collection reports.

### Resource sharing (within MSSA consortium)

#### Describe consortial resource sharing reports that can be generated by the system including: fill rate, turnaround time, borrowing/lending by institution, highly requested items, etc.

### Resource sharing (non-consortial ILL)

#### Describe the ILL reports that can be generated by the system including: borrowing and lending requests; filled, cancelled, and unfilled requests; physically and electronically fulfilled requests; requests by patron type; alerts for high-use titles in ILL; turn-around time; borrowing/lending by institution; and copyright clearance charges filtered by user and department.

#### Describe the system's ability to integrate system-generated data with data from related systems (e.g., ILLiad, RapidILL, INN-Reach, etc.) to produce meaningful, de-duplicated reports.

#### Describe the system's ability to generate cost/use data on ILL transactions.

## Resource Management

### Describe how the solution will allow staff to generate reports on their institution’s collections (for example, reports based on collection age, size, and location, including item and title counts).

### Describe the ability to generate reports on the usage of all types of library resources and the ability to break down usage statistics by other data elements such as demographics, subject, publication date, acquisition date, cost per use, etc.

### Describe the solution’s support for COUNTER compliant reports for databases, e-journals, e-books, and multimedia. How does your solution handle usage statistics from non-COUNTER compliant vendors?

### Describe how the system supports statistics for demand-driven acquisitions (DDA) of e-books, media, and other formats.

### Describe overlap reports available through the system for electronic resources packages.

### Describe how other academic library customers have utilized analytics from the system to correlate student use of library resources with student success measures such as GPA, student retention and completion, etc. How can the data analytics available from your solution be used to help tell the story of the library’s value to the mission of the institution?

### Describe acquisitions-related reports available in the system (for example, accounting reports, lists of new acquisitions, vendor performance reports, etc.).

### Describe standard cataloging/metadata reports (for example, error reports, records added/ withdrawn/deleted, authority reports, etc.).

## Discovery

### How is user activity logged by your solution? Describe which activities are logged, what controls over levels of logging are supported, and what information about the activity and the user is captured in logs. Describe the interface(s) and mechanism by which administrators can view and query the logs?

### Describe how your solution captures search queries. What counts as a new query? What counts as a query refinement? How does your solution determine that?

### Describe how your solution interacts with third-party analytics platforms. What analytics providers does your system work with? How will third-party analytics platforms work for individual campuses? (i.e., how will one campus see analytics related to their visitors but not other campuses' visitors).

**Appendix 1**

**Declaration of Intent to Bid**

**-- Required from all proposers --**

**MS Word version**

REQUIRED: All proposers are required to complete and email this form to rfp@mcls.orgin order for their proposal to be eligible for consideration.

DEADLINE: August 19, 2016, 5pm Eastern Daylight Time

In compliance with the requirements of the MSSA RFP for Shared Library Management Services, the following individual or business is hereby indicating an intent to submit a proposal:

**Company**

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Website: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Representative for all Communication related to the RFP**

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

MSSA contact for all questions and correspondence regarding this RFP:

Randy Dykhuis

Executive Director

MCLS

1407 Rensen Street

Lansing, Michigan 48910

Phone: 517-492-3819

Email: rfp@mcls.org

**Appendix 2**

**Price Methodology**

Scoring will strongly favor pricing proposals that are calculated using a straightforward formula, that include no or very minimal start-up/implementation fees (for example, those that amortize start-up costs across multiple years).

You should provide an individual price for each MSSA library.

# Preferred approach to pricing

## Pricing for Staff Functions (without Discovery)

Contract period: five years, options to renegotiate and renew in five-year increments.

### Provide a pricing formula for academic libraries based on readily available descriptive statistics collected by trusted third parties (for example IPEDS) and base year and annual inflation such that MSSA can readily calculate an annual service fee or price for existing and prospective member libraries.

Pricing should include the following two options for consortium members.

#### Share a single bibliographic database with all other consortium members

#### Distinct bibliographic databases or instances

Pricing methodology should highlight the costs and benefits of each approach. Advantageous and disadvantageous features of each approach should be highlighted. Include extent to which some members of MSSA may elect to share a bibliographic database while others chose to have their own bibliographic database.

## Pricing for Discovery (without Staff Functions)

Contract period: five years, options to renegotiate and renew in five-year increments. Provide a pricing formula for academic libraries based on readily available descriptive statistics collected by trusted third parties (for example IPEDS) and base year and annual inflation such that MSSA can readily calculate an annual service fee or price for existing and prospective member libraries.

## Pricing for both Staff and Discovery functions

### Contract period: five years, options to renegotiate and renew in five-year increments. Provide a pricing formula for academic libraries based on readily available descriptive statistics collected by trusted third parties (for example IPEDS) and base year and annual inflation such that MSSA can readily calculate an annual service fee or price for existing and prospective member libraries. Pricing should include the following two options for consortium members. Pricing methodology should highlight the costs and benefits of each approach.

#### Share a single bibliographic database with all other consortium members

#### Distinct bibliographic databases or instances

# Alternative approach to pricing

In addition to the preferred approach to pricing described in 1, proposers may provide any other suggested approaches to pricing the services bid.

# Pricing for non-member libraries (information not used to score proposals)

Beyond the ten Members, MSSA is also helping to explore LMS options for a broader and more diverse group of non-member Michigan academic libraries. The consortium does not represent these non-member libraries but may elect to play a role in facilitating their adoption of the product(s) selected by the consortium. Proposers are encouraged to respond with a statement concerning proposer’s willingness and potential approach to serving such non-member libraries and a pricing proposal for including non-member academic libraries at a later date.

**Appendix 3**

**MeLCat**

MeLCat is Michigan's patron-initiated, statewide resource sharing system. MeLCat began in 2005 when the Library of Michigan contracted with Innovative Interfaces to use INN-Reach as the underlying software to run the service. More than 425 Michigan libraries now rely on MeLCat for resource sharing, and more than one million requests flow through the service every year.

INN-Reach is built on a physical union catalog. As such, all libraries participating in MeLCat must provide their bibliographic and holdings data for loading into the system. Local shelf status is kept current through regular updates to the central catalog. Like bibliographic and holdings data, patron data must also be kept current. Patron authentication is an essential component of the MeLCat requesting process.

There are two methods that libraries can use to keep bibliographic and patron data up-to-date.

**Method 1: Real-time communication via Direct to INN-Reach APIs**

The Innovative Direct to INN-Reach APIs allow libraries on any library services platform or LMS to directly connect to INN-Reach via Innovative’s cloud platform, the Innovative Open Library Stack (IOLS).

For the Direct to INN-Reach APIs, all traffic and settings are managed and routed through a set of common APIs and services between local library systems and the INN-Reach platform. Using the Direct to INN-Reach APIs, the entire MeLCat workflow is managed using the local LMS.

The services supported by the REST APIs are:

* local-to-central catalog real-time data synchronization for bibliographic and holdings data
* patron authentication for requesting
* circulation transaction synchronization between lending and borrowing systems.

The current INN-Reach design paradigm of real-time data synchronization updates is an expected outcome for vendors implementing against the Direct to INN-Reach APIs. Adherence to other design paradigms are also expected:

* remote patron authentication against the same credentials used locally
* local control over contribution to the INN-Reach Union Catalog
* data quality and de-duplication maintained via the INN-Reach Union Catalog.

**Method 2: Combination of real-time communication and batch data loading via Direct Consortial Borrowing System with NCIP**

Innovative Interface’s Direct Consortial Borrowing (DCB) System with NCIP is a hybrid solution to the data and processing needs of the MeLCat system.

Bibliographic and holdings information (including shelf status) are maintained via batch exports from the local LSP/LMS. Patron authentication and circulation transaction synchronization are maintained via NCIP. Vendors choosing this approach must design their NCIP responder in accordance with the application profile currently in use by MeLCat. This profile, NCIP Direct Consortial Borrowing: INN-REACH DCB Application Profile, is based on NCIP Version 1.

Using the Direct Consortial Borrowing System with NCIP, the entire MeLCat workflow is managed using the DCB client software.

**Appendix 4**

**Current Environment of Participating Academic Libraries**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Institution** | **FTE 2014/2015**  | **Bibliographic Records – Print only**  | **Bibliographic Records – E-books** | **Bibiographic Records – E-journals** | **Number of Individual Authorized Users** |
| **Albion College** | 1,382 | 256,431 (books) | 10,946 | 5,000 | 74 |
| **Ferris State University**   | 11,861  | 217,973  | 220,652 | 2,342 | 60 |
| **Grand Valley State University**  | 21,389  | 418,221  | 891,826[Other E-formats (streaming audio, streaming video, electronic gov. docs, etc.) - 188,709] | 63,739 | 42 |
| **Hope College** | 3.298 | 320,000 | 315,000 | 9,000 | 22 |
| **Kalamazoo College** | 1,456 | 356,532 | 147,683 | 2,678 (print &/or online); 165,259 (e-journals in all aggregators) | 16 |
| **Lake Superior State University**  | 2,174  | 306,881  | 150 | 100 | 15 |
| **Michigan Technological University**  | 7,104  | 390,724  | 102,769 | 6,307 | 22 active users/don’t have a limit |
| **Oakland University**  | 16,056  | 663,001 | 462,645 | 55,338 | 67 |
| **University of Michigan – Dearborn**  | 6,604  | Not including print journals: 270,009; Including print journals: 270,411 | 460,187 | 70,458 | Unlimited |
| **Western Theological Seminary** | 229 | 69,205 | 84,999 | 492 | 6 |

**Appendix 5**

**Currently Installed Systems at Consortium Members**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Institution | LMS | Discovery | Electronic Resource Management | Enterprise Resource Planning Software (e.g. Banner) | Link Resolver | Learning Management System (e.g. Blackboard or Moodle) |
| Albion College | Sierra | Sierra / Summon | CORAL | Banner | 360 Link (Serials Solutions) | Moodle |
| Ferris State University | Sierra | Sierra / Encore / Primo  | N/A | Banner | SFX | Blackboard |
| Grand Valley State University | Sierra | Sierra / Summon | ProQuest 360 Resource Manager | Banner | ProQuest 360 Link | Blackboard |
| Hope College | Sierra | Sierra / Summon | Sierra ERM module | Banner | ProQuest 360 Link /Innovative WebBridge for some resources | Moodle |
| Kalamazoo College | Sierra | Sierra / Summon | EBSCO ERM Essentials and Usage Consolidation | Ellucian | III WebBridge LR, (Hoping to move to EBSCO Holdings Magmt/LinkSource) | Moodle |
| Lake Superior State University | Voyager | OCLC’s WorldCat Discovery | N/A | Banner | OCLC Link Resolver | Moodle |
| Michigan Technological University | Voyager | Voyager/Primo | CORAL | Banner | SFX | Canvas |
| Oakland University | Voyager | Voyager/Summon | N/A | Banner | ProQuest 360 Link | Moodle |
| University of Michigan - Dearborn | Sierra | Sierra / Summon | Home grown using Microsoft Access | Banner | Serials Solutions 360 | Canvas |
| Western Theological Seminary | Sierra | N/A | Cufts | Raiser’s Edge | Cufts | Canvas |