Introduction

This questionnaire has been designed to help us evaluate your library’s current environment and provide you with the most suitable offering for your current and future needs. We therefore ask you to complete this questionnaire in as full and accurate a manner as possible.

**Thank You.**

| Questions | | **Prospect Inputs** | **Comments/Additional Input** |
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| 1 | Do you have multiple installations or multiple databases with any of your ILSs? If yes, provide details. |  | Hope College/Western Theological Seminary - If Hope and WTS are treated as separate institutions, then no. |
| 2 | Please describe the libraries in your consortium:   * Do you have any affiliated libraries? * Do multiple institutions sharing a catalog? * Are there any additional libraries on campus? * Are you serving other libraries in any other capacity? | Albion College - Albion currently shares our ILS server with another library. This library will not be joining us if we move to a new system. We have separate bib, item, and patron records.  Ferris State University - Currently host some small non-academic libraries on our system, but they are currently investigating other library management systems designed to serve the needs of small libraries and will not be part of the MSSA project.  GVSU – 4 libraries  Hope College/Western Theological Seminary - If Hope and WTS are treated as separate institutions, then no to all.  Kalamazoo College - One institution and library, no branches.  LSSU – Currently shares a catalog instance with Northern Michigan University (who is not participating in this RFP)  Oakland University - Main Library (Kresge) Educational Resources Library  University of Michigan – Dearborn - not part of a consortium. We have a main library and 2 departmental libraries that are treated as locations in our ILS | Ferris State University - Kendall College of Art and Design (KCAD) in Grand Rapids is part of Ferris State University. In addition to the library on the main campus in Big Rapids, there is a library on the KCAD campus. We anticipate that this library will probably be treated as a branch location in the new system. The main campus library and the KCAD library currently have separate bib records. |
| 3 | Are all the institutions located in the same country (are there any overseas institution members that are part of any of the institutions)? | The current MSSA institutions are all located within Michigan. |  |
| 4 | What other resources types (Electronic/Digital) are you planning to manage using in the system in addition to Print? | Ebooks, Ejournals, Streaming mult-media, DDA eBooks, online journal packages, subscription databases, databases with owned content, databases, data sets, instructional materials, problem sets, still images, digital and born-digital archival materials, government documents, maps | Ferris State Univerisity - We have digital images of educational manipulatives (i.e. toys), board games, anatomical models, and a few historical photographs embedded in Sierra’s Media Management module. How to migrate these images might require special discussion. |
| 5 | Which link resolver do you currently use? (for example, SFX)? If you are using more than one, or if you belong to a consortium that uses multiple link resolvers, list all of the link resolvers that are used. | See Appendix 5 in the RFP. |  |
| 6 | Are you using an electronic resource management system (ERM)? If yes, which system do you use? | See Appendix 5 in the RFP. | Ferris State University - We do have some locally collected information such as licenses and usage data. |
| 7 | Are you using any digital asset management (DAM) systems? If so, indicate what product or products you are currently using. | Albion College - Yes  Ferris State University – Yes  GVSU - Yes  Hope College - Yes  Kalamazoo College – Yes  LSSU - No  Michigan Tech - Yes  Oakland University - Yes  University of Michigan – Dearborn – No  Western Theological Seminary - Yes | Albion College - Islandora  Ferris State University - The Library Archives and the University Advancement and Marketing division share a photo server using resourcespace software.  GVSU - Preservica, ContentDM  Hope College - Digital Commons, ContentDM, ArtStor Shared Shelf  Kalamazoo College – Dspace  Michigan Tech - Preservica  Oakland University – Dspace, Preservica  Western Theological Seminary - Dspace |
| 8 | Are any of your existing solutions (ILS/ERM/DAM) currently hosted by the vendor? If so, indicate which one(s). | Albion College - Yes  Ferris State University – Yes  GVSU - Yes  Hope College - Yes  Kalamazoo College – Yes  LSSU - Yes  Michigan Tech - Yes  Oakland University - Yes  University of Michigan Dearborn – No – all on our servers | Albion College – Islandora hosted by Lyrasis  Ferris State University - Our Primo discovery tool is hosted by Ex Libris. We currently run all other solutions related to the MSSA project on our own servers.  GVSU - ERM is hosted by ProQuest. DAM is hosted by Preservica and OCLC.  Hope College - Digital Commons, ContentDM, ArtStor Shared Shelf, Counter 360, 360 Link  Kalamazoo College - Dspace is hosted by the Longsight Group.  LSSU - OCLC’s Discovery and Ebsco’s A to Z  Michigan Tech - Preservica and Amazon Glacier  Oakland University - Preservica |
| 9 | Provide the following information about the size and composition of your library collections. If you are completing the questionnaire on behalf of a consortium, provide the total sum across all institutions:   * Total number of unique e-journal titles * Total number of digital objects * Size of your digital collection? (in MBs) | E-Journal information is located in Appendix 4 of the RFP.  Albion College - In Islandora, we have 2943 digital objects at an average size of 13.68 per object.  Ferris State University - As of early July, we had 80,766 unique titles activated in SFX; however, there are only 2342 bib records for ejournals in our catalog database. We have approximately 450 images embedded in Sierra’s Media Management module, but we are not sure how many MBs these represent. There are 222,500 items on our photo server, equal to 4.5 Terabytes of data, but we are not expecting DAM to be part of the RFP project.  Hope College - 16,332 BUT not a part of the LMS and not expected to be, 20 GB (again, not a part of the LMS)  Kalamazoo College - 14,147 digital objects in DSpace  LSSU - Unique e-Journal Titles estimated to be ~150 (if they mean journals subscribed to directly); Digital Objects – virtually none at this time.  Michigan Tech - 80,000 e journals with 33,000 cataloged;11, 432 digital objects in DAM (vastly greater number in archives collections); 270GB  Oakland University - Unique ejournal titles:  57,437; Number of Digital objects: ~8000; Size of digital collection: ~400GB  University of Michigan – Dearborn - Unique e-journal titles: approximately 81,626; Digital objects: <30; Size 8-10 MBs | Ferris State University - Most of our digital collections are in our institutional repository. We do not anticipate that IR will be part of the RFP project. There are currently 5922 digital items in the IR. |
| 10 | What is the total number of individuals who will require login access to the system (including part-time staff and student workers)? | See Appendix 4 in RFP (Number of Individual Authorized Users) |  |
| 11 | Specify the bibliographic record format that you plan to use with the new system (for example, MARC, UNIMARC). | MARC, Marc21 | Ferris State University - We are very interested in BIBFRAME developments and how a new system would incorporate MARC, BIBFRAME, and any other new standards that might develop.  Oakland University – BIBFRAME as it develops |
| 12 | Are you using an external catalog (for example, OCLC Worldcat, British Library, National Library of Australia) as a source for copy cataloging? If so, specify which ones are currently used.  Indicate the following:   * Name of external target * Type (Z39.50, HTTP, other) * Whether authentication is required | Albion College – OCLC Connexion  Ferris State University - OCLC Worldcat is our current source for copy cataloging. We use the Connexion client. Many of our bib records for electronic resources are vendor supplied.  GVSU - OCLC WorldCat.  Hope College – OCLC WorldCat/Connexion  Kalamazoo College - CLC per Connexion browser. Both http and Z39.50. Authentication required.  LSSU – WorldCat Local Discovery  Oakland University - OCLC Worldcat, Authentication is required  University of Michigan – Dearborn - OCLC; HTTP; Yes  Western Theological Seminary – OCLC Worldcat; authentication is required |  |
| 13 | Are you using self-check services? If so indicate:   * The vendor (for example,3M, Bibliotheca) * Approximate volume of circulation (the percentage of total circulation that self-service accounts for) | Yes – some are | GVSU – 3M  Kalamazoo College – Bibliotheca  Western Theological Seminary – Within a year – vendor not selected at this time |
| 14 | Are you using RFID? If so indicate the RFID vendor.   * Can your current ILS read RFID tags directly into the user interface? * Can your current ILS write to RFID tags directly? | Yes – some are | GVSU – 3M – current ILS cannot read RFID tags directly or write to RFID tags directly  Kalamazoo College - Bibliotheca reads and writes to the database through SIP2.  Oakland University - 3M, Our current ILS does not interface with this system  Western Theological Seminary – Within a year – vendor not selected at this time |
| 15 | Does your organization provide an authentication/SSO service (LDAP, CAS, Shibboleth, etc…)? For Patrons? Staff? Both? | Yes – some are | Albion College - Uses the WAM forward table from Innovative for student, staff, faculty off-campus access.  Ferris State University - Our campus uses two separate LDAP streams for students and faculty/staff. We use EZProxy to authenticate Ferris (including KCAD) users to electronic resources.  GVSU - LDAP  Hope College - LDAP  Kalamazoo College - LDAP for both patrons and staff  LSSU – LDAP  Oakland University - LDAP, CAS |
| 16 | Do you provide services and manage accounts for users who are not actively registered in your organization (e.g. alumni, community walk-in users, etc…)? | Yes |  |
| 17 | Indicate any special requirements / issues that you would like the vendor to be aware of (for example, unique customizations, special integrations). | See Appendix 3- MeLCat | Michigan Tech - Ideally visual and functional integration with our DAM and institutional repository  University of Michigan – Dearborn - We have “digital bookplates” ; URLs are added to item records which like to the bookplate |
| 18 | What is the desirable timeframe for you to 'go live' with the new system? | See C.2 in RFP | Ferris State University - Best case scenario would be a July 1 cutover to coincide with our fiscal year and to go live during a slow time of year when staff will feel less stressed. Mid-semester during the regular school year is least desirable.  Michigan Tech - ASAP |

**Fill in the section below only if one or both of the following are true for your system:**

* Your current system has multiple members (multiple institutions, or independent campuses or libraries)
  + You are considering moving to a multiple member system setting ANSWER -> MSSA is considering moving to a multiple member shared system setting. A current shared system does not exist, so many of these questions do not currently apply. RFP responses are to include both a response as a shared system as well as independent instances of the same software.

| Questions | | |
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| **General** | | |
| 19 | Do you have a central unit/office or governance structure that provides services to all members? | MSSA itself does not currently. That is under development.  Ferris State University - Ferris currently provides hosting services for some small libraries, but they will not be part of the migration to a new system. Only Ferris, including the KCAD campus library, is part of the MSSA, so many of the remaining questions are moot. Answers below help to clarify the current situation between the main campus library and KCAD library. |
| 20 | Describe services provided to members by the central unit (for example, configuration, cataloging). | MSSA - N/A  Ferris State University - The main campus library has taken care of systems-related aspects for KCAD, and KCAD has performed its own technical services functions. Technical services within the Ferris libraries might be concentrated on the main campus in future, but that is not the current arrangement. |
| **Configuration** | | |
| 21 | Do members today share the same configuration definitions? | MSSA - N/A  Ferris State University - Yes |
| 22 | Are all members of your organization within the same time zone? | Yes |
| **Resource Management** | | |
| 23 | Do you have a shared catalog (a shared Metadata Management System where institutions contribute and make use of a single and shared catalog)? | MSSA - N/A  Ferris State University - We have a shared database of main library and KCAD bib records, but the two libraries currently maintain separate bib records. |
| 24 | Are you intending to start creating and using a shared catalog as part of our system? | That is one possibility. RFP responses are to include both a response as a shared system as well as independent instances of the same software. |
| **Acquisitions** | | |
| 25 | Do you have a central unit that manages acquisition operations for members? If yes, describe the central operation, (the central negotiation, central acquisitions, and central activation of e-resources). | MSSA - N/A  Ferris State University - The main library and KCAD maintain separate acquisitions and accounting in our current system. As noted above, technical services functions could be consolidated to the main campus at some future date. |
| 26 | Do you have a central receiving department? | MSSA - N/A  Ferris State University - The main library and KCAD currently have separate receiving. |
| 27 | Do members of your organization share the same vendor file (manage administration of vendor details centrally)? | MSSA - N/A  Ferris State University - Yes, the main library and KCAD share the same vendor file |
| 28 | Do members of your organization share same funds file (manage administration of funds details centrally)? | MSSA - N/A  Ferris State University - Funds are currently handled separately at the main library and KCAD, but acquisitions might be centralized at the main campus at a future date. |
| 29 | Do members of your organization share the same licenses file? | MSSA - N/A  Ferris State University - We don’t currently have an ERM, so there isn’t really a licenses file, but all licenses for eresources are Ferris-wide and include the KCAD library. |
| 30 | Do members of your organization share a single financial system (ERP)?  If there are multiple systems, provide details. | MSSA - N/A  Ferris State University - The main campus and KCAD use the same Banner system. |
| **Fulfillment and User Management** | | |
| 31 | Do members of your organization share the same users file (manage administration of user details centrally)? | MSSA - N/A  Ferris State University - Yes |
| 32 | Do members of your organization use a separate authentication system? | MSSA - Currently.  Ferris State University - Ferris and KCAD both use EZProxy, which is currently run on a server at the main campus library. |
| 33 | Do members of your organization use a separate student information system?  Provide details. | See Appendix 5 in the RFP. |
| 34 | Can patrons loan resources from any member (walk in and loan resources from another member)? Can patrons from any MeL library walk in and loan resources from another member?] | Not currently through each institutions’ local system. Some institutions participate in MeLCat’s Visiting Patron program, which is handled through MeLCat. |

**Fill in the section below only if one or both of the following are true for your system**

* You are using a digital asset management (DAM) system (or systems)
  + You are planning to manage digital resources using Alma

ANSWER -> MSSA is not planning on migrating/managing DAM content as part of this RFP

| Questions | | |
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| **Storage and Content** | | |
| 35 | In each system, what types of content are you managing (Images, Sound, etc.)? | Albion College - images  Hope College – Images, sound  LSSU – None yet  Michigan Tech - hotographic images in Preservica; publications, data sets, images and conferences in Digital Commons  Oakland University - Images, Sound, Text, Video, Data |
| 36 | What are the number and average file size for that various types listed above? | Albion College - 2943 objects at an average size of 13.68 MB  Hope College - 16,332 total image, sound, and PDF  Michigan Tech - Unavailable  Oakland University - Image:3851 (avg: 2mb)  Sound: 10 (avg: )  Text: 3800 (avg: 2mb)  Video: 50 (avg: 215mb) |
| 37 | What is the total storage size used for your digital content | Albion College – Our current pricing model allows up to 10k digital objects and 200 GBs of storage  Hope College – 72 GB  Michigan Tech - 270GB for digital images. Unknown for digital repository at this time.  Oakland University - ~500GB |
| 38 | How many files on average are submitted per week? What total file size is submitted per week? | Albion College – 60 per week  Hope College – Varies by project  Oakland University – 24 per month |
| 39 | Do you manage compound/complex content types (i.e. a resource made up of multiple files with structure, expressed using METS complex objects)? | Albion College - Yes  Hope College - Yes  Oakland University - Yes |
| **General** | | |
| 40 | What types of Digital Collections do you manage? Do these collections have some type of hierarchical structure to them? | Albion College - College publications and photographs. Yes.  Hope College – Images, oral histories, institutional repository  LSSU – None yet, but soon will be digitizing campus newspapers, etc.  Michigan Tech - Digital images and repository content. Dublin Core.  Oakland Univeristy - Archival collections with finding aids, video, audio (multiformat audio/video for both archival/preservation and access copies) |
| 41 | How are files submitted today? In large batches? Resource by Resource? | Albion College- Resource by resource  Hope College – Individually and batch  Michigan Tech - Resource by resource; large batched work completed.  Oakland University - Some resource by resource, some in batch (typically project-based) |
| 42 | What users are responsible for submitting files? Staff users? Patrons? Others? | Albion College – Staff users  Hope College – Staff and patrons  Michigan Tech – Library staff mediated  Oakland University – Patrons, faculty, staff |
| 43 | What types of rights or access management, if any, do you use? (e.g. Embargoes, access & viewing restrictions, etc.)? | Albion College – Currently, none.  Hope College – Embargos and access by IP/user level permissions  Michigan Tech - All of these methods are used, especially as they relate to theses and dissertations and patents.  Oakland University - Embargo, campus-only access, restricted to one computer with no copy access, access restricted |