



To: Mayor Higgins
City Council

From: Connie Urquhart, Library Director

Date: June 18, 2018

STAFF REPORT: UPDATE OF THE LIBRARY'S INTEGRATED LIBRARY SYSTEM PROCUREMENT

The Library's Integrated Library System (ILS) is the "brain" of the Library in that it hosts the information for much of the business that takes place there. There are two portals in the ILS: what the staff sees and what the public sees.

On the staff side there are modules for:

- Cataloging
- Running reports and statistics
- Managing patron records
- Acquisitions.

The patron side, traditionally known as the card catalog, has digital modules for:

- Searching
- Placing items on hold
- Paying fines and managing settings on accounts
- Sharing to social media
- Giving and getting recommendations, etc.

BRIEF HISTORY

The ILS currently utilized by the Camas Public Library is the result of an agreement that Fort Vancouver Regional Libraries (FVRL) holds with SirsiDynix (the ILS vendor). Camas Library is considered a contract library of FVRL because FVRL is the subscriber with SirsiDynix. Fort Vancouver also sets the data mapping rules and parameters, and essentially sublets space to Camas within their ILS.

Because Fort Vancouver Regional Libraries and Camas Public Library share a catalog, patrons, and close geographical proximity, an agreement between the two organizations also exists to share materials and allow patrons from either jurisdiction to reserve books and other items from one branch to be picked up at another. For example, a Washougal patron could reserve a Camas book to pick up in Washougal; or, a Camas patron could reserve a Cascade Park book to pick up in Camas. The books are transported from branch to branch courtesy of FVRL's delivery trucks.

In addition to this agreement between Camas and Fort Vancouver, another Interlocal Agreement exists between the two aforementioned organizations, as well as several Portland-area library systems in which

any patron of a participating library automatically has reciprocal borrowing rights at any of the other libraries. There are no deliveries between libraries, but patrons may walk into any of the libraries and receive a library card to that library and receive borrowing privileges. This is called the Metropolitan Interlibrary Exchange, or MIX for short.

In early 2017, Fort Vancouver Regional Libraries notified Camas Public Library that they would be dissolving their agreement that provides Camas Library space in FVRL's ILS; in addition, FVRL would discontinue delivery service to and from Camas Library. Because Camas Library and Fort Vancouver would no longer share a catalog, patrons would not be able to reserve items from one library to be picked up at another between the two organizations; however, the MIX agreement would still stand and any Camas patron could walk into a Fort Vancouver library to check out an item and vice versa.

Together the Camas Public Library and FVRL worked out a timeline for the dissolution of the long-standing agreement, as migrating to a new ILS is a complex process done over several years.

STEP 1: PREPARATION

The Camas portion of the ILS alone holds roughly half a million records. As such the Camas Library has been preparing for the migration over the past year by eliminating records for inactive patrons and removing books from the collection that are no longer being used.

STEP 2: VENDOR SELECTION

RFP process: proposals and evaluation

In March, the Library issued a Request for Proposals that asked potential vendors for extensive and complex information on both modules as described above, as well as technical requirements necessary to run it. We received six responses, including the current vendor SirsiDynix. The proposals ranged anywhere from 50 to 250 pages; all the major ILS vendors were represented. Each member on the RFP team read each proposal and filled out score sheets based on criteria such as user experience, technical functionality, compatibility with connected services, etc.

RFP process: demos and evaluation

Based on the proposal scores, the team brought the four highest-scoring vendors forward to the next phase for demos. Again, we evaluated these vendors on various criteria and spoke with other libraries who are customers of each vendor. Team members were selected for the specific skill sets or areas they represented and each had a different stake in choosing the best ILS for Camas Library. After all four demos were finished, the team got together once more to discuss the pros and cons of each vendor. It was clear that one vendor had risen to the top.

About Innovative/Polaris

Innovative's *Polaris* product offers the best customer experience on the market. What sets Camas Library apart from FVRL is that we provide personalized service—and our online service should be no different. The *Polaris* product creates a local community online with our own patrons and brings those people together using what they read and the organizations they belong to connect people on a local level. It does everything in the bullet points above but also a lot more, specifically to create that customized service for our patrons.

STEP 3: CONTRACTS

To make the successful migration to an independent ILS, there are three contracts necessary.

1. **Subscription license** for Innovative software product *Polaris* (the ILS).

In order to get on the City's fiscal year cycle, this year's contract has been pro-rated for six months until Dec 31, at which time a six-year contract will begin on Jan 1, 2019 through December 31, 2024.

2. **Professional Services Agreement** with Innovative to perform the migration of data from the ILS we currently share with FVRL to the Camas ILS, *Polaris*. This includes training from Innovative.

3. **Professional Service Agreement** for data extraction services from SirsiDynix to Innovative. Cost and vendor are still under negotiation but relative low cost is under the purview of the Library Director.

SUMMARY

2018

1. SUBSCRIPTION LICENSE (SIX MONTH, PRO-RATED)	\$22,922
2. PROFESSIONAL SERVICES AGREEMENT	\$14,760
3. <u>EXTRACTION SERVICES</u>	<u>LESS THAN \$15,000</u>
TOTAL 2018	\$52,682

2019-2024

SUBSCRIPTION LICENSE	\$45,845 PER YEAR
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