



# **Requests for Proposals for Integrated Library System**

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**Fayetteville Public Library**

6/14/2023



Fayetteville  
Public Library

401 W. Mountain St.  
Fayetteville, AR 72701

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## 1 Introduction

**Fayetteville Public Library (FPL or Library) has transformed and empowered its community through free and public access to knowledge. Awarded the prestigious Library of the Year by Library Journal in 2005 as well as an LEED Silver-NC rating from the U.S. Green Building Council, FPL has set the standard for innovation and community building for modern public libraries.**

**FPL offers on average 175 programs each month for children, teens, and adults on top of a vast collection of over 390,000 books, audiovisual items, equipment, and tools. FPL currently serves more than 90,000 cardholders in the Northwest Arkansas area. In 2022 alone, FPL was visited an average of 135 times per hour, and patrons checked out over 1 million library materials, proving that FPL is the central gathering point for the entire community to learn, connect, and explore.**

**In early 2021, the Library opened an 82,000 square foot expansion that doubled the size of the library. The expansion includes new spaces such as a Center for Innovation with audio and video recording studios, virtual reality labs, a simulation lab, fabrication lab, and robotics lab; a teaching kitchen; a 700-seat multipurpose event space with catering services; and a deli.**

**FPL is a single system municipal library governed by a seven (7) member appointed Board of Trustees. The purpose of the Board of Trustees is to provide leadership in performing the mission of the Library; to serve as a liaison between the Library and the City; and to ensure the Library meets the informational, educational, and recreational needs of the community. The Board of Trustees appoints the Executive Director as the head administrator who carries out the policies set forth by the board.**

### Library Details

|   |                  |
|---|------------------|
| <b>Number of library locations</b>                    | <b>1</b>         |
| <b>Bibliographic Records</b>                          | <b>260,775</b>   |
| <b>Item Records</b>                                   | <b>275,503</b>   |
| <b>Active Cardholders (including student e-cards)</b> | <b>91,756</b>    |
| <b>Annual Circulation</b>                             | <b>1,078,297</b> |
| <b>Staff Profiles</b>                                 | <b>106</b>       |
| <b>OPAC Workstations</b>                              | <b>12</b>        |
| <b>Self-Checkout Stations</b>                         | <b>11</b>        |



**The library's collection consists primarily of books and assorted audiovisual materials. The library also circulates equipment and a library of things such as sewing machines, telescopes, and fishing poles.**

**FPL provides eBooks, digital audiobooks, streaming films, and digital magazines through OverDrive, Hoopla, Kanopy, and Flipster.**

### **Current System**

**FPL has been running OCLC Wise since 2021. We use the following modules:**

- **Circulation**
- **Customer Admin**
- **Order Requests (Cataloging/Acquisitions/Serials)**
- **ILL**
- **Selections/Sets (Reports)**
- **Web OPAC**
- **Item Request Manager**
- **Manager/Administration**

## **2 Purpose of Request for Proposal**

**The purpose of this Request for Proposal (RFP) is to provide interested vendors with information needed to prepare and submit a proposal for an Integrated Library System for FPL. The Library, a municipal library under the laws of the state of Arkansas, is seeking responses from qualified proposers offering proven, integrated library systems. The software solution must be user-friendly, robust, and web-based.**

**The Library seeks proposals from qualified vendors who can demonstrate organizational, functional, and technical capabilities, as well as experience, expertise, and qualifications necessary to provide and support a fully integrated and proven software solution to include implementation, conversion of historical data, general guidelines for proper workflow, training, and ongoing maintenance and support.**

## **3 Scope of Project**

**The Library is seeking a fully functional, integrated and web-based ILS, in current general release. The Library's goal is to identify a system that is designed around best practices allowing the Library to streamline and improve processes that result in timely, accurate, and user friendly customer and staff experiences.**

**Additionally, FPL is seeking a vendor who can provide professional services in areas such as, but not limited to, best practices guidance, data preparation for migration, system**



**configuration, training, testing, project management, interface, best practices for data management, and security, that will help ensure a successful implementation in a timely and professional manner.**

### 3.1 General Requirements

**The system should epitomize simple navigation and ease of use in the primary interface of each module, for example minimal keystrokes to accomplish tasks and multiple functions accessible within one screen. Staff must be able to quickly and efficiently move from module to module without requiring the user to exit from the first module, for example from acquisitions to circulation.**

### 3.2 Patron Services & Circulation

**The Library seeks a circulation system that is efficient and easy for staff to use.**

**Specific needs include:**

- **Ability to search for patrons by name, phone, email, birthdate, or address with wildcards searching options.**
- **Ability to include, search by, and address patrons on notifications by preferred names.**
- **Information must be provided on the first screen of patron's record including patron card type, name, age, fines/fees owed, if notes are in record. Gender should not be a required field and preferably suppressed from staff view.**
- **Simple and efficient check in and check out processes using RFID technology.**
- **Ability for patrons to register for accounts online and with the result of a functioning e-card (for access to digital collections and services).**
- **Ability to link minor accounts to responsible adult accounts.**
- **Notifications must be able to be distributed by mail, email, or text depending on the type of notification. Preferably the same notification can be distributed by more than one method. If notification by any of these systems must be integrated through a third-party vendor, please indicate and include vendors that are currently integrated.**
- **Email notification must be automated.**
- **Ability to configure system to allow staff to determine the previous two patrons who checked out an item.**
- **Staff must be able to link to a patron account from the check-in screen.**
- **List of blocks and patron's notes must be visible separately within a patron's record rather than just being included within a list of all items within a patron's history.**
- **Customizable holds slips.**



- **Ability to customize notifications.**
- **The Library is seeking a system that integrates e-signatures.**
- **Must allow for offline circulation when access to the online system is unavailable with the ability to load the collected data to the system once it is available.**

### 3.3 Cataloging

**The Library seeks a system that provides a full range of functionality yet is easy for all technical services staff to use, including those doing copy cataloging and those creating full bibliographic records.**

**Specific needs include:**

- **Ability to conduct all core cataloging and acquisitions tasks in a single, web-based environment.**
- **Ability for an authorized staff member to catalog, link, check in, and check out items in the Main Library and Bookmobile collections using one user profile.**
- **Ability to bulk change item records.**
- **Ability for authorized library staff to copy, merge, overlay, and delete records and title records without consulting with ILS technical support representatives.**
- **Integration of hotkey navigation and actions, allowing staff to edit entirely with the keyboard.**
- **Ability to locate and retrieve existing records from other libraries via Z39.50 connections.**
- **Native ability to program RFID tags during cataloging.**
- **Native ability to generate and print spine and pocket labels according to library's preferred formats, including the ability to use local / item-level call numbers rather than call numbers recorded in bib records.**
- **System validates tags, subfields, codes, and all other data in fields when MARC records are created or imported.**
- **Automated synchronization of holdings with OCLC.**
- **Ability to create and edit local authority records.**

### 3.4 Public Access Catalog

**The Library seeks a system that is intuitive, easy to use for patrons and encourages more use of the library's collections.**

**Specific needs include:**



- **System supports the ability to browse and search the catalog at minimum by author, title, subjects, genre headings, call number, series, publication date, publisher, and format.**
- **Advanced searching options.**
- **The system must be able to hide or suppress missing and withdrawn items from public view.**
- **The system must be able to automatically suppress a missing or withdrawn item if it is the last item connected to a bibliographic record and unsuppress if item is checked in (in the case of a missing item).**
- **The system must suggest alternate spellings for misspelled searches.**
- **The system must allow holds to be placed on items in on-order or processing status.**
- **The OPAC must be able to fully integrate with the Library's website, including offering a search tool that directly links to the catalog.**
- **Users must be able to delay a hold fulfillment until a certain date.**
- **The catalog should display graphics to identify different genres and formats.**
- **The catalog should allow for customized graphics to support discovery of collections of equipment and tools.**
- **Users must be able to easily see the shelf location of an item on the first page of the record.**
- **The shelf status of the items must display on the first page of search results and on the first page of the record of the item.**
- **Customizable display of bibliographic records in the OPAC.**
- **Patrons can manage online renewals and holds.**
- **Supports languages in addition to English. Besides English, languages commonly spoken in our geographic area include Spanish, Marshallese, Chinese and Arabic.**
- **Must be customizable to a mobile platform, such as a cell phone or tablet.**
- **List of results retrieved in response to a search must provide relevant results. Searches should be available for categories or groups of materials, such as a list of children's films, new books, holiday books, etc.**

### 3.5 Acquisitions

**The Library seeks a system that allows authorized library staff to place orders with third-party vendors, import vendor records, create item records for ordered items, and register the receipt of items and the payment of invoices.**

#### **Specific needs include:**

- **Ability to place orders and receive advanced shipping notices and invoices using Electronic Data Interchange (EDI).**
- **Ability for authorized library staff to edit or delete purchase orders and invoices without contacting the a technical support representative.**



- **Reliable and consistent automated importing of EDI invoices from Baker & Taylor, Midwest Tapes, and Ingram.**
- **Ability to create and use order templates.**
- **Ability for authorized library staff to create and manage vendor profiles in the same work environment where other acquisitions work is conducted.**

### 3.6 System Administration

**The Library seeks a system that can be managed with a minimal amount of time required on a daily basis yet provides options throughout the system for configuring the system. Six staff members at the Library share system administration duties. The Library also seeks a system with a test environment to test changes to configuration before making them live. Permissions for modules must be easily defined and customized for both individual user and groups**

### 3.7 Reports

**The Library seeks a system that comes with a full list of reports for easy access by library staff. In addition, the Library requires a system that allows staff members to build and produce reports using data of staff members' choosing.**

#### **Specific needs include:**

- **Reports must be accurate.**
- **Discuss how deletions from the item and bibliographic databases are reported, including in reports that the library will use for annual statistics.**
- **Staff must be able to create record sets from searches and also by adding unique records to a set.**
- **Staff must be able to create, customize, schedule, save and email reports. Reports must be able to be exported into a usable excel format that can be sorted and without editing spreadsheets in order to calculate formulas.**
- **Reports must include but are not limited to: patron counts by library card status, new card registrations, hold ratios, circulation by format and collection, patron records based on creation date, patron records based on addresses, collection fund reports including encumbered and expended amounts and percentage spent in relation to starting budget.**

### 3.8 Marketing

**The Library seeks a system that integrates library marketing with the ILS patron data.**

#### **Specific needs include:**

- **Ability to import and manage contacts.**





- **Provide templates.**
- **Ability to manage bounced emails.**
- **Ability to provide unsubscribe workflows.**
- **Provides engagement metrics.**
- **Ease of use and ability to integrate the Library’s branding into all patron communications.**

### 3.9 Third-party Integrations

**The Library seeks a system that integrates third-party systems with the ILS to use technology to offer and manage a wide variety of services. Describe the method and functionality of integrations listed below.**

**Required integrations include:**

- **Bibliotheca self-checks**
- **RFID capability supports legacy data models including Bibliotheca data model 12 and latest ISO standards.**
- **Bibliotheca gate hardware and control and tracking software.**
- **Bibliotheca Open+.**
- **Tech Logic AMH with print and apply label applicator system**
- **Envisionware Printing and Computer Reservations**
- **Smart Money Manager**
- **Comprise**
- **OverDrive**
- **Hoopla**
- **Communico (website, app, room reservations, event registrations)**
- **Must authenticate remote patrons for access to e-resources located outside of the Library, including licensed databases.**
- **Fully SIP2 compliant**
- **API available for third party integrations.**

**The tables below show the anticipated number of users in 2024 by department and different user purposes of the proposed solution:**

| <b>Department</b>   | <b>2024 Projected Users</b> |
|---|-----------------------------|
| <b>System Administrators</b>                              | <b>6</b>                    |
| <b>Technical Services (Cataloging &amp; Acquisitions)</b> | <b>6</b>                    |
| <b>Circulation</b>  | <b>19</b>                   |
| <b>Reference and Adult Services</b>                       | <b>19</b>                   |



|  |           |
|--|-----------|
| <b>Youth and Teen Services</b>         | <b>16</b> |
| <b>Center for Innovation</b>           | <b>7</b>  |
| <b>Community Engagement (Outreach)</b> | <b>4</b>  |
| <b>Marketing</b>                       | <b>4</b>  |

**Proposer will adhere to all guidelines, timelines and requests specified in this RFP.**

**Deliverables**

**include but are not limited to:**

- **Software licenses for approximately one hundred ten (110) users.**
- **Maintenance and support, as may be required.**
- **Technical implementation services, including configuration, facilitating user acceptance testing, corrective actions, onsite and remote training, data migration and integration with target FPL systems.**
- **Post implementation support of no less than one hundred and twenty (120) days.**

**4 Timeline**

**The following represents FPL’s projected schedule of events. FPL desires to be live on the new system no later than March 1, 2024.**

|  |  |
|--|--|
| <b>FPL issues Request for Proposal (RFP)</b>     | <b>Wednesday, May 31, 2023</b>                           |
| <b>Deadline for Proposer to submit questions</b> | <b>Wednesday, June 7, 2023</b>                           |
| <b>Deadline for Proposal Submission</b>          | <b>Wednesday, June 14, 2023 – 4:00 PM CST</b>            |
| <b>Finalists Notified</b>                        | <b>Thursday, June 15, 2023 – 12:00 PM CST</b>            |
| <b>Demonstration Presentation Day</b>            | <b>Friday, June 16, 2023 – 9:00 AM CST – 4:00 PM CST</b> |
| <b>Contract Awarded/Board Approval</b>           | <b>Tuesday, June 20, 2023</b>                            |
| <b>Go-Live (anticipated)</b>                     | <b>March 1, 2024</b>                                     |

**\*Vendors must be available for the presentation date outlined in the above chart as this date is firm and FPL is not able to accommodate any changes to the schedule.**

FPL reserves the right to modify the schedule of events as it deems necessary.

**5 Proposal Requirements**

**Proposers must submit an electronic PDF version of their proposal no later than Wednesday, June 14, 2023, at 4:00 p.m. CST. Label all email communications concerning this RFP with “Proposal for Integrated Library System” in the subject line. All communications must be submitted via email to the RFP Coordinator identified below:**



**Arienne Taylor, Office Manager**  
[ataylor@faylib.org](mailto:ataylor@faylib.org)

**Vendors who circumvent the outlined communications process may be eliminated from the RFP process. Vendors responding to this RFP must adhere to the timeline noted above as well as provide sufficient responses to all the below requests for information. Failure to respond to any of the requests may result in disqualification of the proposal. Further, any oral communications will be considered unofficial and non-binding with on the Fayetteville Public Library.**

### 5.1 Proposal Details

**To facilitate the analysis of responses to this RFP, proposals should be prepared as simple as possible and provide a clear and concise description of the solution's capabilities to satisfy the requirements of the RFP. The proposal should be clearly labeled and organized into the following major sections:**

#### Section 5.1.1 – Executive Summary

**Include in this section a brief and concise summary of Proposer's solution and a description of the Proposer's credentials to deliver the services, and the experience working with organizations similar in size to the Library.**

#### Section 5.1.2 – Company Profile and Background

**Include in this section a description of company's background/history including the following:**

- **Number of years in business**
- **Number of customers and employees**
- **List services available**
- **History of proposed product**
- **Development Strategy and Roadmaps**
- **Current version of product and next planned release date**

#### Section 5.1.3 – Company Qualifications

**Include in this section the company's qualifications and experience in implementing solutions similar in size and scope of the Library:**



- Describe the familiarity with integrated library systems and associated business processes, and specific experience with the requirements of public libraries.
- Identify Proposers existing client base including the number of existing clients using the version/release of the software being proposed. Specifically identify experience with agencies similar in size with the Library.

#### Section 5.1.4 - References

**Include in this section three (3) references that utilize the proposed system that have been implemented in the last five (5) years. References should be from public libraries of similar size.**

**References should include the following:**

- Reference name and contact information (name, title, address, and email).
- Brief project description, including identifying the software version, type of solution modules, and interfaces implemented.
- Number of agency employees.
- Implementation date, timeline, and Go-Live date.

#### Section 5.1.5 - Proposed Solution

**This section should identify the proposed solution. If the Proposer has different solution types for the same software, separate pricing must be included for each solution type. Provide a total cost of the solution. See section 8 – Pricing, for detail of what is required.**

**This section should include the following:**

- Name and origin of solution
- Release history and current release being proposed
- Number of operational installations
- List of proposed modules including the main features and functions of each
- Hardware and database requirements for the proposed delivery model
- Specify any unique licensing costs associated with the proposed solution

#### Section 5.1.6 – Implementation Project Plan

**In this section, clearly identify each phase, the timeline proposed, and the roles and responsibilities to be performed by the Proposer and those to be performed by the Library. This section should include:**



- **A description of the implementation and project management methodology and approach**
- **A list of key resources to include project manager who will be assigned to the project**
- **Recommended project phasing and an implementation schedule**
- **A list and description of all implementation deliverables and documentation that will be provided**
- **Clear outline of the roles and responsibilities expected of the Library staff during the implementation**
- **A description of the data conversion and migration plan including the Proposer's services to support and perform the data extraction from the existing system, data clean-up, and mapping**
- **Training, testing, and deployment plans**

#### Section 5.1.7 – Support and Maintenance

**This section should outline the following:**

- **Describe the post-implementation change management process, specifically addressing the process and timeframe the Proposer would support the Library in assessing and evaluating functionality post-implementation.**
- **Describe the type of support services provided. Specify if it is 24/7 support, where support staff is based.**
- **Identify the typical upgrade/new application release schedule.**
- **Describe how software upgrades and downtimes related to upgrades will be communicated and performed.**
- **Describe how customer requests for enhancements are handled.**
- **Specify and describe if there is the ability to delay, test, accept, and/or deny any application releases.**
- **Describe the software maintenance provided as part of the ongoing maintenance.**
- **Describe the recent history of system enhancements (last 2 years).**
- **Training resources available for future staff in the event of employee turnover.**

#### Section 5.1.8 – Pricing



**In this section, provide a clear and comprehensive understanding of all costs associated with the software, implementation, and ongoing maintenance of the proposed system. The proposer must identify all costs required to complete a successful implementation including:**

- **Proposer should clearly identify all costs associated with implementation to include:**
  - **Software Licensing Costs (initial cost followed by annual cost for 3 years consecutively)**
    - **List each module and cost**
  - **Implementation Services**
    - **Project Management**
    - **Software Configuration**
    - **Data Conversion and Migration**
    - **Interface Development**
    - **Training and Documentation**
    - **Testing**
    - **Go-Live**
  - **Third party products required or recommended for proposed system**
- **Proposer should clearly identify all costs associated with ongoing maintenance and supporting for a 3-year consecutive period to include:**
  - **Maintenance and Support**
  - **Post implementation assessment and evaluation for at least 120 days.**

#### Section 5.1.9 – Software Licensing and Maintenance Agreements

**In this this section, Proposers must provide any software licensing, maintenance, and/or 3<sup>rd</sup> party agreements that would be required to implement and use the Proposer’s solution.**

#### 6 General Terms and Conditions

##### *Clarification Discussions*

**The Library reserves the right, at its sole discretion, to request clarifications of proposals or to conduct discussions for clarification with any or all Proposers. The purpose of any such discussions shall be to ensure full understanding of the proposal. Discussions shall be limited to specific sections of the proposal identified by the Library and, if held, shall be after the initial evaluation of proposals is complete. If clarifications are made because of such discussions, the Proposer shall put such clarifications in writing.**



### *Letter of Transmittal*

**Each proposal shall include a letter of transmittal (using the “Proposal Summary Sheet” provided). On the transmittal letter include a signature and signature block of an authorized representative of the proposer, as well as the names of the individuals authorized to negotiate with the organization. Insert this information at the bottom of the sheet.**

### *Proposal Preparation Costs*

**The Proposer is responsible for any and all costs associated with the preparation, submittal, and presentation of any proposal.**

### *Proposal Withdrawal*

**To withdraw a proposal, the Proposer must submit a written request, signed by an authorized representative, to the RFP Coordinator identified in Proposal Requirements Section 5. After withdrawing a previously submitted proposal, the Proposer may submit another proposal at any time up to the deadline for submitting proposals**

### *Rejection of Proposal*

**Fayetteville Public Library reserves the right to reject any and all proposals. The Library also reserves the right to award all or any portion of the submitted proposal which is in the best interest of the Library. Failure or inability to meet any of the requirements set forth in this specification will be sufficient reason to disqualify any proposal.**

### *Proposal Duration*

**All prices quoted within the proposal must remain unchanged for a period of one hundred and twenty (120) days after the date of request for proposal opening.**

### *Contract Negotiations*

**After a review of the information and completion of the demonstration, the Library intends to enter into contract negotiations with the selected Proposer. Fayetteville Public Library reserves the right to negotiate with the selected proposer a contract acceptable to the Library. These negotiations could include all aspects of services and fees. If a contract is not finalized in a reasonable period of time, the Library will open negotiations with the next ranked Proposer.**

### *Presentations*

**Selected proposers may be asked to make presentations during the timeframe outlined in the Timeline section of this RFP. Proposers must be available for all the presentation dates listed. Fayetteville Public Library reserves the right to eliminate this step in the request for proposal process if it so desires.**



*Implementation*

**Fayetteville Public library reserves the right to split the installation to best fit FPL's schedule.**

*Insurance*

**The firm must provide and maintain in force at all times during the term of the contract contemplated herein insurance for Workers' Compensation as required by Arkansas State Law, Commercial General Liability, Automobile Liability, and Errors and Omissions Liability in not less than the amount of \$1,000,000. Proof of such shall be submitted prior to award of contract.**

*References*

**Please provide three (3) references for public library installations with preference given to installations for public libraries.**

*Security*

**Software proposed must have the capability for role-based permissions/security.**

*Level of Effort Expected by the Successful Proposer*

**Fayetteville Public Library expects that the successful proposer will be able to supply applications, programs, personnel, training, software maintenance and assistance in the details of implementing the system so that it is operational in a minimum amount of time at a minimum cost. In many respects, this installation can best be described as "turnkey", and the successful proposal should be prepared to supply the type of support consistent with these requirements. Fayetteville Public Library will have a qualified staff person to act as its liaison with the proposer.**

*Type of Cost Proposal Desired*

**All prices quoted in proposals should be fixed price in so far as supporting software and support services are concerned. Submitters have the option of quoting fixed price or time and materials prices for such things as training and implementation costs. If time and materials prices are quoted, the proposal must show a table of guaranteed hourly rates for the level of service provided together with a statement of expected costs for a three-year period.**





*PROPOSAL SUMMARY SHEET*

**VENDOR NAME:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**CITY, STATE, ZIP:** \_\_\_\_\_

**REPRESENTATIVE:** \_\_\_\_\_

**TELEPHONE:** \_\_\_\_\_

**E-MAIL ADDRESS:** \_\_\_\_\_

1) **SOFTWARE – PRODUCT NAME(S)** \_\_\_\_\_

2) **COSTS** \_\_\_\_\_

• **SOFTWARE** \_\_\_\_\_

• **NUMBER OF USERS** \_\_\_\_\_

• **CONVERSION** \_\_\_\_\_

• **INSTALLATION /  
IMPLEMENTATION** \_\_\_\_\_

• **INTEGRATION** \_\_\_\_\_

• **SUPPORT: MONTH/YEAR** \_\_\_\_\_

• **TRAINING** \_\_\_\_\_

• **OTHER CONSIDERATIONS** \_\_\_\_\_

**TOTAL SYSTEM PRICE** \_\_\_\_\_

*Note: Please add as many components as necessary to complete this form.*



**A response is required for each of the following checklist items. Brief comments may be entered in the table. Elaborate on any items that differentiate you from other vendors on a separate attachment (reference the item). Assign one of the following Codes to each item:**

**Y = Currently available**

**N = Not Available**

**C = Requires customization**

**T = Third Party Software Required**

**FE = scheduled future enhancement**

#### GENERAL SYSTEM FEATURES

| <i>General System Features</i>   | <i>Code</i> | <i>Notes</i> |
|--|-------------|--------------|
| <b>1. System tracks and records any modifications and transactions for all record types.</b>   |             |              |
| <b>2. The staff interface allows users to select, copy, and paste content from any field into other programs (e.g. Microsoft Office Suite and other ILS modules)</b> |             |              |
| <b>3. System assigns a unique identifier to each record for all record types which is visible to staff and is searchable through all staff interfaces.</b>           |             |              |
| <b>4. System supports the local creation of records for all record types through multiple locally-defined templates and/or work forms.</b>                           |             |              |
| <b>5. System allows for shortcut keys for various functions.</b>   |             |              |
| <b>6. System supports creation, batch edit, and deletion of records for all record types.</b>  |             |              |
| <b>7. System supports creation of record sets with batch editing capability for</b>  |             |              |



|   |  |  |
|---|--|--|
| <b>patron records, bibliographic records, and item records.</b>   |  |  |
| <b>8. System supports title, volume, copy level hold requests in both Staff Client and OPAC.</b>  |  |  |
| <b>9. Data must be housed in a minimum tier 2 data center with preference given to tier 3 and above.</b>  |  |  |
| <b>10. All updates to ILS database and systems should minimize downtime and rollback capabilities.</b>  |  |  |
| <i>Patron Services &amp; Circulation</i>  |  |  |
| <b>1. Ability to search for patrons by all fields in patron registration.</b>   |  |  |
| <b>2. Wildcard searching in patron database available.</b>  |  |  |
| <b>3. System supports multiple addresses in patron account.</b>   |  |  |
| <b>4. Required patron information on initial screen (patron type, name, age, account balance, number of items out)</b>                                |  |  |
| <b>5. Gender is not a required field and can be suppressed from staff clients.</b>  |  |  |
| <b>6. Simple check-in and check-out functions with RFID technology.</b>   |  |  |
| <b>7. Ability for patrons to register for accounts online.</b>  |  |  |
| <b>8. Online registration results in accounts that immediately allow for access to e-resources (ebooks and databases) without staff intervention.</b> |  |  |
| <b>9. Ability to link minor accounts to responsible adult accounts.</b>   |  |  |
| <b>10. Notifications can be distributed by mail (bills specifically), email, and text.</b>  |  |  |
| <b>11. Email notifications are sent automatically.</b>  |  |  |
| <b>12. Notifications can be customized.</b>   |  |  |



|   |  |  |
|---|--|--|
| <b>13. Ability to configure system to allow staff to determine the previous two patrons who checked out an item.</b>  |  |  |
| <b>14. Staff can link to patron account from check-in screen.</b>   |  |  |
| <b>15. List of blocks and patron notes are visible separately within a patron's record rather than just being included with a list of patron history.</b>                     |  |  |
| <b>16. Customizable holds slips.</b>  |  |  |
| <b>17. E-signatures are integrated.</b>   |  |  |
| <b>18. Must allow for offline circulation when access to the online system is unavailable with the ability to load the collected data to the system once it is available.</b> |  |  |
| <b>19. System allows for auto-renewal with customized parameters.</b>   |  |  |
| <b>20. System allows staff to change the dates of one or more items during check-in/check-out/renewal/due-date processes, individually and in batches.</b>                    |  |  |
| <b>21. System allows staff to perform individual, partial, or all item renewals in a patron account.</b>  |  |  |
| <b>22. System can track "in house" circulation</b>  |  |  |
| <b>23. System tracks online activity when determining 'last use by patron' dates.</b>   |  |  |
| <b>24. System supports the creation of custom fees.</b>   |  |  |
| <b>25. System allows for merging and transferring holds.</b>  |  |  |
| <b>26. System allows for staff to move patrons up or down a hold queue.</b>   |  |  |
| <b>27. System allows staff to change the pick-up location of holds.</b>   |  |  |
| <b>28. System supports a holds pick list for retrieval of items. The list should</b>  |  |  |



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| <b>have a mobile option and the ability to sort holds by locations.</b>   |  |  |
| <b>29. System allows customizable blocks for different actions. (E.g. block from self-check at \$50 but do not block from computer use or access to ebooks for any fines)</b> |  |  |
| <b>30. System allows for customized checkout periods, including hourly checkouts.</b>   |  |  |
| <b>31. Describe how patron history is managed, including purging patron history.</b>  |  |  |
| <i>Cataloging</i>   |  |  |
| <b>1. Ability to conduct all core cataloging and acquisitions tasks in a single, web-based environment.</b>   |  |  |
| <b>2. Ability for an authorized staff member to catalog, link, check in, and check out items in the Main Library and Bookmobile collections using one user profile.</b>       |  |  |
| <b>3. Ability to bulk change item records.</b>  |  |  |
| <b>4. Ability for authorized library staff to copy, merge, overlay, and delete records and title records without consulting with ILS technical support representatives.</b>   |  |  |
| <b>5. Integration of hotkey navigation and actions, allowing staff to edit entirely with the keyboard.</b>  |  |  |
| <b>6. Ability to locate and retrieve existing records from other libraries via Z39.50 connections.</b>  |  |  |
| <b>7. Native ability to program RFID tags during cataloging.</b>  |  |  |
| <b>8. Native ability to generate and print spine and pocket labels according to library's preferred formats, including the ability to use local / item-level call</b>         |  |  |



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| <b>numbers rather than call numbers recorded in bib records.</b>  |  |  |
| <b>9. System validates tags, subfields, codes, and all other data in fields when MARC records are created or imported.</b>  |  |  |
| <b>10. Automated synchronization of holdings with OCLC.</b>   |  |  |
| <b>11. Ability to create and edit local authority records.</b>  |  |  |
| <i>Public Access Catalog</i>  |  |  |
| <b>1. System provides Library with a consistent, predictable and uniform graphical user interface, available through the most common web browsers. Please indicate which web browsers and versions the system supports.</b> |  |  |
| <b>2. System meets ADA requirements. Please indicate any public interface functionality that is not ADA-compliant.</b>  |  |  |
| <b>3. System supports the ability to browse and search the catalog at minimum by author, title, subjects, genre headings, call number, series, publication date, publisher, and format.</b>                                 |  |  |
| <b>4. Searches can be limited by publication date/date range, format, language, shelf location, specific collection, genre, reading level, availability, on-order, series, etc.</b>   |  |  |
| <b>5. Advanced searching availability, including Boolean or other multi-field search, Full-text, phrase keyword.</b>  |  |  |
| <b>6. The system must be able to hide or suppress missing and withdrawn items from public view.</b>   |  |  |



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| <b>7. The system must be able to automatically suppress a missing or withdrawn item if it is the last item connected to a bibliographic record and unsuppress if the item is checked in.</b> |  |  |
| <b>8. Search suggestions for misspelled words.</b>   |  |  |
| <b>9. The system allows for holds to be placed on items that are on-order or being processed.</b>  |  |  |
| <b>10. OPAC must fully integrate with the library's website, including offering a search tool that directly links to the catalog.</b>  |  |  |
| <b>11. Users must be able to delay a hold fulfillment until a certain date.</b>  |  |  |
| <b>12. Catalog can display graphics to identify different genres and formats.</b>  |  |  |
| <b>13. Book cover art in OPAC is supplied by vendor.</b>   |  |  |
| <b>14. Graphics can be customized in OPAC to identify library materials such as tools and equipment.</b>   |  |  |
| <b>15. Users can easily see the shelf location of an item on the first page of the record.</b>   |  |  |
| <b>16. The shelf status of the items must display on the first page of search results and on the first page of the record of the item.</b>   |  |  |
| <b>17. Customizable display of bibliographic records in the OPAC.</b>  |  |  |
| <b>18. Patrons can manage online renewals and holds.</b>   |  |  |
| <b>19. List all of the languages currently available for your public interface.</b>  |  |  |
| <b>20. Searches retrieve most relevant results.</b>  |  |  |
| <b>21. System provides the ability for authenticated patrons to change</b>   |  |  |



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| <b>password, review their items out, review items on hold, review outstanding fines and fees, renew one or more items, place and cancel holds, suspend and activate holds, change their email address, print and email lists of items checked out, create reading lists</b> |  |  |
| <b>22. System allows patrons to manage (opt-in and opt-out) saved reading history.</b>  |  |  |
| <b>23. System creates a permalink to each record in the public interface and a simple URL which can be shared.</b>  |  |  |
| <b>24. Unlimited licenses for the Public Access Catalog. If not unlimited, please specify the quantity proposed and basis for the quantity.</b>   |  |  |
| <b>25. Is Discovery natively based on BIBFRAME? If not, please describe roadmap for integrating BIBFRAME.</b>   |  |  |
| <b>26. Search results provide a single search result and single on-screen request button for each title.</b>  |  |  |
| <b>27. Does Discovery offer enriched content as part of the Discovery solution or is this an extra cost?</b>  |  |  |
| <b>28. A kids discovery version is available.</b>   |  |  |
| <b>29. Digital archive is managed, cataloged in system and viewable through OPAC.</b>   |  |  |
| <b><i>Acquisitions</i></b>  |  |  |
| <b>1. Ability to place orders and receive advanced shipping notices and invoices using Electronic Data Interchange (EDI).</b>   |  |  |
| <b>2. Ability for authorized library staff to edit or delete purchase orders and invoices without contacting the a technical support representative.</b>  |  |  |





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| <b>3. Reliable and consistent automated importing of EDI invoices from Baker &amp; Taylor, Midwest Tapes, and Ingram.</b>  |  |  |
| <b>4. Ability to create and use order templates.</b>   |  |  |
| <b>5. Ability for authorized library staff to create and manage vendor profiles in the same work environment where other acquisitions work is conducted.</b>                       |  |  |
| <b><i>System Administration</i></b>  |  |  |
| <b>1. Administrative interface is provided to allow authorized staff to configure and edit parameters.</b>   |  |  |
| <b>2. System must retain all relevant data from the previous ILS.</b>  |  |  |
| <b>3. System provides granular permissions which can be set through System Administration for all modules within the system.</b>   |  |  |
| <b>4. System provides the ability to control display options in the OPAC. Allows the library to customize OPAC text, banners/logos, header, footer with library specific data.</b> |  |  |
| <b>5. System provides the ability to create and update the content and format of all notifications.</b>  |  |  |
| <b>6. System allows batch edit and deletion of all record types based on library-determined criteria.</b>  |  |  |
| <b>7. System provides the ability of generating reports, conducting batch processes.</b>   |  |  |
| <b>8. System allows data extraction of all record types.</b>   |  |  |
| <b>9. System provides the option to specify closed days for system.</b>  |  |  |
| <b>10. System provides interface that allows the administrator to monitor</b>  |  |  |



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| <b>scheduled tasks, overnight services, system logs, etc.</b>  |  |  |
| <b>11. System provides help desk/support service which is accessible via telephone, email, and web portal during key hours with a maximum turnaround of 24-hours.</b>  |  |  |
| <b>12. Vendor provides 24-7 online access to documentation, knowledge base, and self-paced training to authorized library personnel.</b>   |  |  |
| <b>13. Vendor provides simple process for submitting and tracking enhancement requests.</b>  |  |  |
| <b>14. Vendor provides regularly updated roadmap showing what releases are planned and what features are expected in the coming releases.</b>  |  |  |
| <i>Accounting</i>  |  |  |
| <b>1. System integrates with library financial management systems for financial transactions to include but not limited to ordering, invoicing, payment of library bills including fines and fees. Provide a list of external financials system(s) you have successfully implemented payment interfaces?</b> |  |  |
| <i>Reports</i>   |  |  |
| <b>1. Staff can create, customize, schedule, save, and email reports.</b>  |  |  |
| <b>2. Record sets may be created from search results and also adding unique records to a set.</b>  |  |  |
| <b>3. Record sets can be exported to excel, saved, and support bulk changes.</b>   |  |  |
| <b>4. Reports can be exported to Excel to be sorted and support excel formulas without much form manipulation.</b>   |  |  |
| <b>5. Reports must include, but are not limited to, patron count by any of the</b>   |  |  |



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| <p><b>fields in the patron record, new card registrations, hold ratios, circulation by format, circulation by collection, collection fund status reports included expended and encumbered amounts and calculating percent of budget remaining.</b></p> |  |  |
| <p><b>6. Reports can be scheduled and sent to specific staff members on a scheduled cadence.</b></p>   |  |  |
| <p><i>Marketing</i></p>  |  |  |
| <p><b>1. Notification text and format can be customized to match FPL brand guidelines.</b></p>   |  |  |
| <p><b>2. System is easy to update and upload images to. System can create newsletters and format of patron newsletters is easily editable.</b></p>   |  |  |
| <p><b>3. Ability to import and manage contacts.</b></p>  |  |  |
| <p><b>4. Templates provided.</b></p>   |  |  |
| <p><b>5. Ability to manage bounced emails.</b></p>   |  |  |
| <p><b>6. Ability to provide unsubscribe workflows.</b></p>   |  |  |
| <p><b>7. Engagement metrics are available.</b></p>   |  |  |
| <p><b>8. Ability to customize communications to various patron lists as determined by library identified parameters.</b></p>   |  |  |
| <p><i>Third-party Integrations</i></p>   |  |  |
| <p><b>1. System supports Envisionware PC Reservation and printing.</b></p>   |  |  |
| <p><b>2. System's RFID capability should include support for legacy data models including Bibliotheca data model 12 and support for the latest ISO standards.</b></p>  |  |  |
| <p><b>3. System supports Bibliotheca gate hardware and control and tracking software.</b></p>  |  |  |
| <p><b>4. System supports Bibliotheca Open+.</b></p>  |  |  |



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| <b>5. System supports Tech Logic AMH with print-and-apply label applicator system.</b>   |  |  |
| <b>6. System supports Tech Logic Inventory Wand.</b>   |  |  |
| <b>7. System supports integration with Smart Money Manager.</b>  |  |  |
| <b>8. System supports fully integrated and PCI compliant Ecommerce solution in OPAC.</b>   |  |  |
| <b>9. System supports integration with Communico (website, app, room reservations, event registrations, schedule modules)</b>  |  |  |
| <b>10. System provides integration and access to digital content from third party vendors, such as OverDrive, Hoopla, and Kanopy.</b>  |  |  |
| <b>11. System supports integration with Acquisitions vendors: Baker &amp; Taylor, Ingram, Midwest Tapes.</b>   |  |  |
| <b>12. System supports integration with OCLC Connexion.</b>  |  |  |
| <b>13. SIP2 compliant.</b>   |  |  |
| <b>14. System supports Ezproxy to authenticate remote patrons for access to restricted resources.</b>  |  |  |
| <b>15. System supports integration with enhanced content such as EBSCO Novelist Select and Novelist Plus.</b>  |  |  |
| <b>16. API available for third party integrations. Describe how the system exposes data through documented API and web services. Is there an additional charge for these services?</b> |  |  |
| <b>17. Describe company's support for creating and using web services based on published APIs.</b>   |  |  |



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