

Process - Review of Library System Vendor Responses

RFI (#C002816) – Integrated Library Systems (ILS) Solutions

Goal of RFI Review

- Develop good understanding of the evolving library systems market
- Determine if the market is robust enough to start a RFP process/procurement process
- Determine costs associated with implementation and ongoing maintenance to use for planning budgets and determining sources of revenue
- If go forward with a RFP process – use the responses from the RFI to help guide the language and focus of the RFP

Background – taken from the RFI

- *Purpose*
 - Acquire information on the developing library systems market and future directions of integrated library systems that could effectively support multi-campus, consortial library services; use information as a basis for ongoing planning
- *Scope*
 - Acquire information on a next generation ILS that can support the significantly varied needs and sizes of libraries across SUNY; including vendors' product roads maps, services in support of those products, and associated costs
- *Responses to be shared with*
 - Library Systems RFI Review Group
 - SUNY community (versions of the responses without financial or other proprietary content)
- *Demos*
 - Solutions that illustrate the capability to provide the envisioned project scope may be invited to provide webinars of their solution to the OLIS staff and the SUNY community; these would be a further source for obtaining a general understanding of capabilities and functionality of ILS products

Preliminary Activities

SUNY Learning Commons – create two groups

- Library Systems RFI Review Group
 - Participants: Office of Library and Information Services staff, SUNY Council of Library Directors Executive Board members, selected campus representatives, selected ATIS members
 - Use space to house the complete vendor responses
 - Provide copy of the RFI
 - Provide copy of vendor questions to the RFI (that were due May 1) and responses
 - Use space for summaries of meetings, questions, conversations, etc. among the Review Group
- “Next Gen” Library Systems Information (not yet created as of 6/30/2015)
 - Open to any participants at a SUNY campus
 - Use space to house versions of the vendor responses that do not include financial or propriety information
 - Provide copy of the RFI

- Use space to provide updates on related RFI activities such as announcing vendor demos, include URLs of vendor demo presentations, etc.
- Encourage SUNY participants to use the Group Forum feature for providing comments/thoughts/questions on the vendor responses, vendor demos, and other topics related to next generation library systems
- Publicize this group (once created) through the SUNYLA, SUNYLMS, and SCLD listservs

RFI Review Activities

OLIS Staff and SCLD Ex Board Members

- Meeting 1 (phone/webinar)
 - Review the purpose of the RFI
 - Request review of the RFI vendor responses – themes to keep in mind during the review
 - Components of these “next gen” online library management systems
 - Differences between “next gen” and those systems from the late 1990s
 - Trends in vendor product development
 - What vendor products/services are in development
 - What vendor products/services are production
 - Maturity level of vendor products
 - Pricing models – buy-in and ongoing
 - Support services – implementation, training, migration, ongoing
 - Availability of enterprise level systems that can support the size and scope of SUNY libraries
 - Process for documenting responses – suggestion for discussion
 - Create a spreadsheet checklist based on Section 9 of the RFI / themes as noted above / other topics
 - to compare responses from the various vendors
 - intent is not to rate vendors but to get an idea of what information appears reasonable; where information is missing, incomplete, or not clear
- Meeting 2
 - What questions arise out of the vendor responses
 - What additional information is needed
 - How might that information be obtained
 - Demos
 - Consider scheduling of vendor webinar demos open to the SUNY community
 - Record vendor demos
 - Consider conversations with vendor customers
- Meeting 3
 - Review spreadsheet checklist
 - Make decisions on next steps

Timeline – suggestions

- June 2015 (mid to late) - first meeting [done as of June 26]
- August 2015 (early) – 2nd meeting [scheduled for August 5]
- September/October 2015 – schedule Webinars with vendors
- November 2015 – 3rd meeting

Other activities to consider?

- Role of Library community beyond what is listed above
- How the RFI review relates to the One Bib Project
- How the RFI review relates to the review of SUNYConnect services

Library Systems RFI Review Team

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