## DEPARTMENT OF ADMINISTRATION
## STATE FINANCIAL SERVICES DIVISION
## STATE PROCUREMENT BUREAU

http://sfsd.mt.gov/

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**September 23, 2019**

To:      All Interested Vendors

Re:      Request for Information

The State of Montana, Montana State Library is requesting information regarding bibliographic record cataloging, interlibrary loan, and digital content management and preservation products and services. The State of Montana invites all interested parties to submit a written response to relevant sections of this Request for Information (RFI). Parties may respond separately to any and all sections of this RFI.

This RFI is being sought strictly for the purpose of gaining knowledge of products and services available with an estimate of their corresponding costs and should not be construed as intent, commitment, or promise to acquire services, supplies, or solutions offered. **No contract will result from any response to this RFI.**

Information submitted in response to this RFI will become the property of the State of Montana.

The State of Montana will not pay for any information herein requested nor is it liable for any cost incurred by the vendor.

RFI responses must be received via eMACS prior to **October 25, 2019.**

Technical or requirement questions pertaining to these services may be directed to Cara Orban.

We appreciate your response to this request.

## 1.0    PURPOSE AND OBJECTIVES

1.1    The specific purpose of this Request for Information is to gather information about available multi-type library consortium options for participating Montana libraries. Public, special, academic, and school libraries are eligible for these services.

1.2    The objectives of this project include:

Learn what options are available for copy cataloging and original cataloging products and services at different levels of access for a statewide consortium of multi-type libraries;

Learn what options are available for interlibrary loan products for a statewide consortium of multi-type libraries;

Learn what options are available for providing a hosted digital content management system for a collaborative statewide program with which consortium administrators and staff can create and store metadata records; upload digitized content to a shared, centrally hosted online environment; provide a user interface within a shared website for end users to access the content; archive digital masters for long term preservation; and receive technical support.

## 2.0    PROJECT DESCRIPTION

The services in this contract or contracts serve hundreds of thousands of patrons through over 200 libraries throughout the state of Montana. The different programs that rely on these services include:

**The Montana Memory Project,** an online source for digital collections relating to Montana's cultural heritage. In part, these collections document the Montana experience. Access is free and open through the Internet. Many of these items are digitized copies of historic material, some items are contemporary. All serve as a resource for education, business, pleasure, and lifelong learning.

Many Montana libraries, museums, archives, and cultural institutions add materials to this collection. Contents may include maps, copies of photographs, rare books, historic documents, diaries, oral histories, audio and video clips, paintings, illustrations and art.

**Resource sharing among Montana libraries,** which require web-based tools that enable library patrons and staff to locate, acquire, catalog, lend, and preserve library materials. Over 200 multi-type (academic, public, special, and school) libraries are enrolled in a program to share a contract for cataloging and interlibrary loan tools. This program seeks to ensure that libraries of all sizes can afford access to these tools in order to create equitable access to information for all Montanans.

Additionally, the Montana Shared Catalog serves 180 multi-type libraries and requires the capability to share and attach local holdings to bibliographic records which adhere to the consortium's Standard Cataloging Procedures.

## 3.0    RFI RESPONSE INSTRUCTIONS

The State is asking all interested parties to submit a response containing the following information:

- ✓ Your interest in providing the services/supplies.
- ✓ Brief description of experience providing similar services/supplies.
- ✓ From your experience, has the State identified all the major components necessary to complete this project? If not, please provide information on other necessary components.
- ✓ Please provide a list of potential problems/risks that the State may encounter during this project. Please provide any ideas or suggestions about how such problems/risks should be addressed in a solicitation.
- ✓ Your best estimated price range to provide the services/supplies as stated herein, lowest estimate to highest estimate.
- ✓ Your best estimated time frame for completing the project.

## Questions

Responses should address the following questions [all products unless otherwise specified]:

PART ONE: ALL PRODUCTS

**Statistical Reporting Requirements**

1. Please describe how consortium administrators and institution-level library staff can access and generate on-demand statistical reports, including:

- Types of reports available (usage, item count, item format, web analytics, end-user accounts, etc)
- Parameters by which reports may be refined
- Time increments or date ranges available
- Export options

2. How soon are statistical reports available?

3. How long are statistical reports accessible?

4. Are statistical reports accessible at the institution level as well as at the consortium level?

5. Are statistical reports that identify institution-level data in aggregate available to consortium administrators?

6. Does the statistics portal offer a dashboard for at-a-glance usage statistics?

7. Does the statistics portal offer data visualization tools?

8. Can the statistical reports discern or remove bot searches from user counts?

9. In what file formats are statistical reports available for export (CSV, etc)?

10. Are statistical reports available for export in machine-readable format (JSON, XML, etc)?

11. Are statistical reports able to detail usage by interface (web, OAI, API, etc)?

12. Are statistical reports and web interfaces able to integrate with Google Analytics tools, including Tag Manager?

**Support Requirements**

1. Please describe how support requests from consortium administrators and member library staff are acknowledged and resolved.

2. Please provide the average turnaround time for acknowledging and resolving support requests.

3. Please describe, as applicable, how and when direct support to member library staff is available:

- Via email

- Via help desk system

- Via telephone

4. Please explain any limits to or additional costs associated with technical support to consortium administrator or to member libraries.

**Technology Requirements**

Accessibility

1. Are all interfaces for both end-users and staff accessible, compliant with current Americans with Disabilities Act (ADA) standards?

2. Are all interfaces for both end-users and staff accessible, compliant with WCAG 2.0 Level AA guidelines?

3. Are instructions available for interface keyboard accessibility? Please describe.

4. Please describe screen reader capability and provide accuracy rates for both end-user and administrative interfaces.

5. Does the product provide capability to identify images using alt text?

6. Does the product provide capability for metadata and transcripts to be accurately and logically read by a screen reader?

7. Please describe how information presented visually is equally accessible to a screen reader.

8. Please describe how support for HTML-ARIA tags are implemented to meet industry standards.

9. Can be transcripts be formatted text to improve readability?

Software

1. Please describe hosted environment.

2. Please describe backup redundancies using industry standard procedures.

3. Is your product HTML 5 compliant?

4. Are SSL certificates supplied and maintained?

5. Is content versioning available?

6. What is your up-time guarantee for the service?

7. What is your average service recovery time?

8. Please describe process for and frequency of automatic data backups and recovery.

9. Please describe the process of running fixity checks and resolving identified issues.

10. What authentication methods are available to staff and to end-users?

11. Please describe how apps and web presence are kept current.

12. Is the product interoperable with Z39.50?

13. Is the product interoperable with SirsiDynix Symphony?

14. Is the product interoperable with Ex Libris Alma?

15. Please describe how updates and/or development roadmaps are shared with customers.

16. Please provide recommended bandwidth and internet browser requirements for a web-based tool.

17. Please outline what industry standard organizations your organization actively participates in and/or contributes to.

Staff Access

1. Can multiple simultaneous users upload and edit content? Please describe any limits on simultaneous access and/or number of available staff and administrator accounts.

2. Please describe how different levels of administrator access may be assigned within consortium.

End-User Interface

1. Please describe ability to build and customize web pages at the consortium level as well as at the collection and/or institution level.

2. Do the website and apps feature responsive design? Please describe.

3. Is the interface fully searchable?

4. Can the product link to items in member institutions' online public access catalogs (OPACs)?

5. Can institution-level admins update OPAC links for their institution's holdings?

6. Please describe any additional fees for web or app customization work.

**Training Requirements**

1. Please describe availability of regular live and recorded virtual training that is accessible to member libraries at no cost.

2. Please describe availability of in-person training opportunities for member library staff within Montana.

3. Please list training topics available for this product for staff and, if applicable, end-users.

4. Please describe documentation and tutorials available to member library staff and administrators.

**References and Qualifications**

Vendors must demonstrate that they are production ready by providing a description of their experience in working with state libraries and consortia.

Vendors must provide three references to current contract holders of similar size and scope.

PART TWO: CONTENT MANAGEMENT SYSTEM AND DIGITAL PRESERVATION

**Statistical Reporting Requirements**

1. Are statistical reports available for Optical Character Recognition (OCR) data, including number of pages completed per collection and across all collections?

2. Are statistical reports able to detail number of multi-part objects?

3. Are statistical reports able to detail number of items saved by contributor?

4. Are statistical reports able to detail number of items per collection as well as in total?

5. Are statistical reports able to detail number of pages per collection as well as in total?

6. Are statistical reports able to detail number of page views per item as well as by collection?

7. Are statistical reports for usage data available by institution as well as by collection?

**Marketing Requirements**

1. Please describe what kind of marketing content (electronic, print) is available to participating members as part of our contract cost, including:

- Format

- Quantity (print)
- How frequently materials are produced or updated
- Ability to integrate or export content with social media tools
- Ability to customize marketing materials with program branding and URL

**Technology Requirements**

<u>Metadata</u>

1. Is metadata customization possible at the item level? Please describe.

2. Which metadata standards and frameworks are supported (Qualified Dublin Core, etc)?

3. Which controlled vocabularies are supported (Library of Congress, Dublin Core Metadata Initiative, etc)?

4. Can consortium administrators create customized controlled vocabularies? If so, at what levels?

5. Is collection-level creation and maintenance of controlled vocabularies for specific metadata fields available?

6. Can contributors batch upload metadata revisions via a spreadsheet and use Open Refine or similar tool to find discrepancies?

7. Can individual library staff members customize metadata fields?

<u>Software</u>

1. Please describe the client and/or web portal for contributors to upload materials (stand-alone and/or web-based).

2. Is there a size limit for collections or items?

3. Is there a limit to the number of administrators or staff users? Please describe.

4. Does the software allow for both batch and individual asset loading?

5. Does the software allow for movement and sharing of objects between collections?

6. Please describe how vendor provides support in transferring files without loss of quality.

7. Are administrators able to set permissions on image downloads per individual contributor requirements?

8. Can content contributors upload mixed media multi-part objects?

9. Please describe available integrated Optical Character Recognition (OCR) functionality.

10. Is there a limit to the number of OCR scans per license?

11. Please describe available integrated transcription of video and audio assets.

12. Please describe available video captioning or captioning support.

13. Please describe integrated transcoding and media conversion.

14. Please describe whether content and metadata at the item level and/or the collection level can be edited after it has been uploaded.

15. Can metadata be edited in batch? Please describe.

16. Does the product provide stable item-level URLs?

17. Can any aspect of the metadata or the digital object be edited without that change resulting in a different URL for the item-level record?

18. Does the product allow for Open Archives Initiative (OAI) aggregation from other sources?

19. Does the product allow for OAI harvesting?

20. Does the product provide a secure storage environment for long-term preservation of master files?

21. Please describe any fees associated with access to and dissemination of storage files.

22. Please describe available transition assistance to migrate content if contract is terminated.


End-User Interface

1. Can end-users apply advanced search filters and/or facets to narrow their search? Please describe Search and Advanced search capabilities.

2. Is content searchable through metadata and full-text searches?

3. Please describe end-user's ability to create, save, export, and share lists of selected items.

4. Please describe image view and thumbnail resolution and formats used (TIFF, JPEG).

5. Can end-users zoom and pan without losing image quality?

6. Can end-users download images and choose from options for file size and format, with permission from contributor?

7. Can end-users browse pages of a multi-page object?

8. Can end-users contribute mediated comments on items?


## PART THREE: BIBLIOGRAPHIC CATALOGING

**Statistical Reporting Requirements**

1. Are statistical reports available for withdrawals data?

2. Are statistical reports available for bibliographic holdings data?

3. Are statistical reports available for the number of original records produced, edited, and deleted?

4. Please describe any available consortium-level collection analysis functionality.

5. Please describe any available group print management functionality.

**Technology Requirements**

1. Please describe how reclamation (scan/delete; keeping collection synchronized for ILL and discovery) services are scheduled for consortium and any additional costs associated with this service.

2. Does the product allow for establishing a shared login for consortium configuration?

3. Is a web-based cataloging utility available?

4. Please describe your database including size, structure, and features. Please list the number of full unique bibliographic records in your database.

5. Does the product allow for searching records individually and in batch?

6. Does the product allow for creating both copy cataloging and original MARC records that comply with Montana Shared Catalog record standards? (Please see https://desk.zoho.com/portal/montanastatelibrary/kb/articles/scp-bib-record-standards)

7. Please describe whether macros and constant data are available.

8. Please describe ability to perform authority control.

9. Please describe ability to validate records.

10. Are MARC records or MARC record loads available from vendors that our libraries order materials from? If so, please explain what costs are associated with this feature, if any.

## PART FOUR: INTERLIBRARY LOAN

**Statistical Reporting Requirements**

1. Are monthly borrower and lender statistics accessible at the institution level and consortium level?

2. Are statistical reports available for IFM (ILL Fee Management) data?

3. Are statistical reports available for in-state and out-of-state interlibrary loan monthly totals by institution and in both aggregate and summary at the consortium level?

**Technology Requirements**

1. Can institutions set permissions so that end-users can submit mediated or unmediated interlibrary loan requests online?