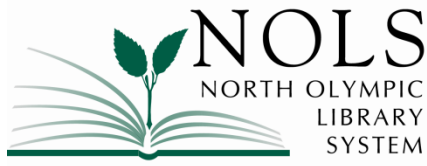# REQUEST FOR PROPOSALS FOR
DISCOVERY TOOL

Released: (September 29, 2021)
Closes: (October 22, 2021)

Erin Shield, Collection Services Manager
North Olympic Library System

2210 South Peabody Street
Port Angeles, WA 98362
360-417-8500 • eshield@nols.org

1. INTRODUCTION AND GENERAL INSTRUCTIONS

A. North Olympic Library System ("NOLS") wants to provide an easy, seamless online experience that will enhance access and engagement opportunities for its customers. The proposed software, ("Discovery Tool") will better help customers explore the wide variety of resources and services offered by NOLS. This Request for Proposal is issued pursuant to RCW 39.04.270 and is directed to companies that offer a software-based solution which will meet NOLS' needs.

B. All qualified firms interested in providing these services to NOLS are invited to respond to this Request for Proposals.

C. NOLS reserves the right, without penalty, to add, remove, modify or otherwise update this RFP, in any way NOLS sees fit, provided that such modifications shall be submitted with due notice prior to the deadline for submission.

D. This invitation does not commit NOLS to pay any costs incurred in the preparation of proposals nor commit NOLS to select any proposer that responds.

E. NOLS reserves the right to waive any irregularities or informalities in procedure, and to reject any or all proposals without penalty. Any and all submissions may be rejected for any cause. Further, NOLS reserves the right to cancel this project with or without reason.

F. Vendors shall comply with all management and administrative requirements established by the Washington Administrative Code (WAC), and the Revised Code of the State of Washington (RCW), and any subsequent amendments or modifications, as applicable to providers licensed in the State of Washington.

2. BACKGROUND

A. NOLS is a public library system that primarily serves residents of Clallam County in Washington State. The annual budget is over $5,000,000. Over 40,000 registered users are served through four community libraries. A bookmobile is anticipated to launch by Summer 2022.

B. NOLS has used the Polaris Integrated Library System (ILS) since 2004.

C. NOLS hosts its website, [www.nols.org,](http://www.nols.org) and ILS onsite.

3. HOW TO RESPOND TO THIS RFP

A. Questions about this RFP. All questions should be directed to Erin Shield, Collection Services Manager, at 360-417-8500 x7724 or eshield@nols.org. Questions may be submitted no later than October 14, 2021.

B. Response should be submitted in either Word or pdf format. Electronic or paper copy will be permitted. If submitting a print copy, please avoid bindings, glossy covers and other superfluous additions.

C. Proposal submission. To be considered for selection, proposers must submit a complete response to the RFP as defined in this section. Proposals must be received on or before 4:00pm on October

22, 2021 at the North Olympic Library System's Technical Services Department, 2210 South Peabody Street, Port Angeles, WA 98362 or by eshield@nols.org. Confirmation of receipt of email submissions are the responsibility of the vendor.

4. <u>TIMELINE</u>

A. NOLS seeks to confirm its costs for the 2022 fiscal year with a three-year contract beginning January 2, 2022.

RFP issued	September 29, 2021
Deadline to submit questions	October 14, 2021
Final date for NOLS to issue query responses and addenda (if any)	October 18, 2021
Proposals due	October 22, 2021
Completion of additional webinars, proposal review and vendor selection / contract negotiation	November 8, 2021
Award of contract by NOLS Board of Trustees	November 18, 2021

4. <u>SCOPE OF WORK</u>

A. Objectives to be achieved with this project: NOLS desires to enter into a contract with a quality vendor that can deliver a Discovery Tool that fits NOLS' needs in the most cost-effective manner.

5. <u>PROPOSAL CONTENT</u>

A. Proposals should be brief, concise, and responsive to the specific requests in this section.

B. Include a brief discussion of your company's reputation and examples of successful provision of similar services to other clients.

C. Proposals should fully address all questions, specs, and requirements indicated under item 7. DISCOVERY TOOL FEATURES.

D. Provide the names and contact information for at least three clients using vendor's Discovery Tool similar to those requested in this RFP.

E. Provide explanation of company's billing cycles and policies. Use Section 7.S to provide information on specific costs of Discovery Tool.

6. <u>SELECTION</u>

A. Proposals will be evaluated by a committee consisting of the Executive Director, Collection Services Manager, and Information Technology Manager and other staff as needed. Proposals will be evaluated on the basis of vendors' qualifications, references and current clientele, responsiveness to this RFP including functionality of proposed Discovery Tool, and any other factors deemed relevant and in the best interests of NOLS. Price will be a factor in the final selection, but functionality is more important.

B. Vendors whose Discovery Tool meet our expectations will be given an opportunity to conduct additional webinars demonstrations, or online presentations for NOLS staff to demonstrate the Discovery Tool and respond to NOLS questions.

7. **<u>DISCOVERY TOOL FEATURES</u>**

Please provide information to demonstrate how the proposed Discovery Tool will address the following needs.

A. **Integration with the Polaris ILS**

   a. Version 6.7.7121

   b. Modules in use: Acquisitions, Patron Services, Public Access Catalog (PowerPAC), Cataloging, Circulation, Interlibrary Loan, Serials, Administration, Utilities

   c. Additional: LEAP (a browser-based user interface for Polaris); Simply Reports (add-on reporting utility.)

   1. Will the Discovery Tool offer complete indexing and synchronization of bibliographic, authority, and holdings records from Polaris? Any limitations or qualifications?

   2. What fields in the MARC records derived from Polaris are indexed in the Discovery Tool?

   3. Does the Discovery Tool offer real-time status of items?

   4. Can a customer place a hold on an item in the Polaris catalog? Any limitations (like separate customer account)?

   5. Is a customer's account profile based on the patron record in Polaris?

   6. Does this Discovery Tool provide customers the same functions as the Polaris account manager, e.g., lists of currently checked out items, holds, update account information, etc. Any limitations?

   7. Does the Discovery Tool allow online payment of fees?

   8. Does the Discovery Tool include an option to maintain the customer's reading history? For customers who currently have a reading history in Polaris, would NOLS use of the Discovery Tool have any impact on existing reading history information?

   9. Does the Discovery Tool include an option for customers to maintain multiple reading or "wish lists"? For customers who currently have a reading list in Polaris, would NOLS' use of the Discovery Tool have any impact on existing reading list information?

B. **Relevancy**

   1. Please describe the algorithm used to calculate relevancy for items in a search result.

   2. Are there any configuration choices available to the library for relevancy weightings?

   3. Describe what determines the order in which results are returned.

   4. What fields are searched when doing a "keyword" search? Do any of the fields have a higher weight than others? If yes, describe the weighting system.

   5. When searching a name like "Stephen King", which could return results both *by* Mr. King and *about* Mr. King, what rules govern display of the search results?

   6. Would NOLS have any ability to influence the display results? If yes, how much control does NOLS have?

C. **Presentation of results**

1. What categories of facets are available in the interface? What options are present to display or suppress facets?

2. What metadata is needed or used from the bibliographic records derived from the ILS?

3. What metadata is needed or used from the authority records derived from the ILS?

4. Can results be limited or filtered to reflect current "on shelf" status? If Yes, can this be limited to one library branch?

5. Do the results include real-time, location-specific information about where an item is located? (Including the branch as well as collection and shelf location?)

6. Does the Discovery Tool return results in a non-biased manner, that is, are results balanced relative to the content source? How is this ensured?

7. Is the Library able to configure preferences to influence prioritization of results?

D. **E-Resources integration**

1. Describe the types of e-resources supported by the Discovery Tool and the process used to extract, import, and index the content.

2. Complete tables in Appendix 1 that list third-party subscription databases and resources NOLS subscribes to and include them as part of the response. The resources are in three groups:

    a. Table 1: e-Resources for which MARC Records are loaded into NOLS's Polaris ILS

    b. Table 2: top priority e-Resources offered to NOLS customers

    c. Table 3: e-Resources available in-library only

3. For products in Table 1 (MARC records loaded into Polaris) would the Discovery Tool enable access to the contents of these resources outside of the bib records being in Polaris?

4. If the Discovery Tool offers an alternative to any of the third party products or e-resources NOLS subscribes to, provide a brief description of which product(s) could be affected.

5. How does the Discovery Tool share information about resources which are available to end users but are not available through the catalog or bib records? (An example would be calendar information about library programs in Demco's SignUp and Signups software; a second example would be LinkedIn Learning courses or Gale database articles – see Table 2.)

E. **Recommendations**

1. Does the Discovery Tool suggest alternatives if the search terms don't yield a valid result? If yes, are the alternatives restricted to items owned by the library? How is this ensured?

2. Does inclusion of a search term such as "DVD" trigger any filters or influence the results?

3. Does popularity influence the search results? If Yes, describe what "popularity" means and how it impacts the display of search results.

F. **"Did you mean" spell-checking**

1. How does the Discovery Tool treat words that do not appear in the index or are misspelled?

2. Will a suggested alternative always be something that is available from NOLS?

G. **Enriched content**

1. Are cover images, reviews, and user-driven input part of the results display?

2. What is the source for images used in the display of results?

3. Would NOLS be able to upload images for items owned or licensed by the library such as local histories that are not widely available elsewhere?

H. **Integration with social networking sites**

1. Does the Discovery Tool enable the user to relay information about library materials through common social sites such as Facebook, Twitter, Instagram, etc.? Please give an overview of the social media capabilities of the Discovery Tool.

I. **User contributions**

1. Does the Discovery Tool enable end users to create / read / share reviews or ratings related to specific items or services available through the Library? If Yes, provide a high-level overview.

2. If end users have the ability to create reviews or assign ratings, does the Library have any ability to control how or when they are shared? If Yes, provide an overview.

3. Does the Discovery Tool enable end users to create or share reading lists? If Yes, provide an overview of this feature.

4. Does this product offer any other user contribution features?

5. Does this Discovery Tool integrate with other third-party products to offer additional features? If Yes, provide a brief description of each.

J. **Support**

1. Describe the customer service model NOLS would experience if this Discovery Tool were selected. Cover the implementation phase and ongoing support.

2. Are there specific support staff dedicated to a NOLS account, or to a geographic region, etc.? What is the average turnaround time for a support issue to be addressed?

K. **Single sign on**

1. Does the Discovery Tool offer a "single sign on" to enable an end user to log in once and then move back and forth

   a. within the ILS and their account information,

   b. to and from any third-party databases,

   c. to place holds on Library-owned materials?

2. If there are limitations to the "single sign on" process, acknowledge and describe them.

3. As an alternative, can the Discovery Tool work with other single sign-on or authentication services that the Library might implement?

4. NOLS offers a "New Items" web page which requires Polaris authentication to place a hold on a new item. Does the Discovery Tool offer a "single sign on" that would enable an end user to move to a NOLS web page that requires Polaris authentication? Is there an API that would enable NOLS staff to maintain the same functionality?

L. **Hardware / Software**

1. Is the Discovery Tool offered through software as a service (SaaS) or does it require the installation of software on servers hosted in the library or externally?

2. If the software requires local installation, what hardware or software requirements are necessary to install or use the Discovery Tool? What is recommended?

3. Does the Discovery Tool require any plug-ins or modifications to web browsers? What browsers are supported?

4. What skill sets are necessary to maintain the Discovery Tool? Please discuss whether dedicated NOLS staff are necessary, or desirable, to ensure the successful installation and ongoing use of this Discovery Tool.

5. How often is the Discovery Tool upgraded? How does an upgrade affect any customization or settings the Library has put into place? What is the average downtime involved in an upgrade?

6. During network outages, does the interface continue to function or is it dependent on its connection with the ILS?

M. **APIs**

1. Is there an API associated with the Discovery Tool? What features does the API offer? List the requests and responses supported by the API.

2. What is the philosophy or goal behind development of the API? What is the business model of the API?

3. Does the API support secure transmission through https?

4. What does the API not provide?

5. What future development plans exist for the API?

6. Is access to the API included in the base price of the Discovery Tool or does its use require an additional fee?

N. **Support for mobile devices**

1. Does the Discovery Tool feature responsive design? Will the Discovery Tool display all content for all devices sizes and orientations equally well, without needing downloadable software Apps or multiple products (i.e. desktop site and a mobile site)?

2. Are there any qualifications or limitations on the feature of responsive design?

O. **RSS feeds**

1. Does the Discovery Tool offer subscribable syndicated content, primarily of booklists items, through RSS? Does the Discovery Tool offer any 'notify me' (of something new or different) features?

P. **Web interface**

NOLS expects the Discovery Tool to be presented to its users with NOLS branding, logo and presentation style.

1. Does the Discovery Tool support the use of CSS to enable it to follow a presentation style consistent with its website and other resources?

2. Can the Discovery Tool be implemented to consistently use NOLS's own domain name in all URLs presented to users?

3. How do design trends in commercially successful websites influence what the Discovery Tool offers and how it looks?

4. Would Library staff be able to make changes or enhancements to the Discovery Tool's web presentation and have those enhancements persist through vendor upgrades?

Q. **Persistent links**

1. Regarding persistent links of any webpage within the Discovery Tool, can an end user easily create and share by simply copying the URL and sending to others or sharing on social media? For example, could an end user perform a search, select narrowing options/facets and then send the URL to someone else and have it perform the exact search?

R. **Privacy and Security**

1. Describe the measures implemented in the Discovery Tool to protect the privacy of NOLS patrons.

2. Does the Discovery Tool transmit all web pages using https? Describe any web tracking agents or cookies that the Discovery Tool embeds in its interface (Google Analytics, AdSense, DoubleClick, Facebook Connect, etc.)

3. Provide the complete privacy policy that applies to the Discovery Tool.

4. Has your organization been certified to be in compliance with international standard for information security or equivalent standards or recommended practices?

S. **Costs**

1. What is the cost if NOLS selects this Discovery Tool? (If information beyond what has been shared is necessary in order to cite a price, ask for that information by October 14.) Project the initial license and installation for first year PLUS any annual costs (support, maintenance, etc.) for an additional two years.

2. If there are factors that influence the price (e.g., local hosting v. web-based; levels of customer support; etc.) describe those as part of the pricing model.

3. Are upgrades included as part of costs paid?

8. **TERMS AND CONDITIONS**

    A. NOLS reserves the right, without penalty, to:

        1. add, remove, modify or otherwise update this RFP, in any way NOLS sees fit, provided that such modifications shall be made with due notice prior to submission date;
        2. waive any irregularities or informalities in procedure, and accept any proposal or part thereof which shall be deemed to be the most favorable to NOLS;
        3. reject any submissions for any cause;
        4. cancel the project with or without reason;
        5. retain all proposals submitted and to use any ideas in the proposal regardless of whether that proposal is selected;
        6. have the option to continue with the consultants selected and/or to conduct a new selection process for future services, beyond those services advertised in this RFP.

    B. Proprietary information/Public Disclosure. All proposals received shall remain confidential until a contract, if any, resulting from this RFP is signed by the Executive Director, or it is determined by NOLS that no contract will be entered into pursuant to this RFP. Pursuant to RCW42.56, all proposals submitted under this RFP shall thereafter be considered public records and, with limited exceptions, will be available for inspections and copying by the public.

APPENDIX 1
NOLS E-RESOURCES, OCTOBER 2021

NOLS's intention with these tables is to learn, for each e-Resource, how much of the content the Discovery Tool is able to present as part of a user's search, and whether there are conditions or limitations to the results a user would see. Please complete the tables and include them as part of the response.

TABLE 1: e-Resources for which MARC Records are loaded into NOLS's Polaris ILS

	Notes from NOLS	*Notes about Discovery Tool: displaying this information as part of a search, updating the records, implementation challenges, etc.*
OverDrive – WA Anytime Library	Part of WDLC – state consortium	
hoopla	Currently cover images do not display reliably	
LinkedIn Learning	Currently not loaded but considering for future; specifically Spanish content	

TABLE 2: Top priority e-Resources offered to NOLS customers

	As part of the normal implementation of the Discovery Tool, the contents of this resource could appear as part of the search results. Y or N	*The contents of this resource might be able to be integrated into a search; it would need further discussion. Y or N*	*Other notes, comments about this resource. Cite 1-3 other public libraries that include this e-resource as part of a search result using the Discovery Tool.*
Chiltons Automotive			
Consumer Reports			
CultureGrams			
Gale OneFile			
HelpNow (BrainFuse)			
Heritage Quest			

JobNow (BrainFuse)			
LinkedIn Learning			
NewsBank			
NoveList K-8			
NoveList Plus			

TABLE 3: e-Resources available in-library only

	Notes, Comments
Ancestry	