

# REQUEST FOR QUOTATION

FOR ILS MANAGEMENT SERVICES FOR MISSOURI EVERGREEN  
CONSORTIUM AND TO CONTRACT FOR THREE (3) YEARS BEGINNING  
SEPTEMBER 1ST, 2019 AND ENDING AUGUST 31, 2022



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# REQUEST FOR QUOTATION (RFQ)

TO PROVIDE ILS MANAGEMENT SERVICES FOR MISSOURI EVERGREEN CONSORTIUM AND TO CONTRACT FOR THREE (3) YEARS BEGINNING SEPTEMBER 1ST, 2019 AND ENDING AUGUST 31, 2022

APRIL 15TH 2019

## INTRODUCTION:

The Missouri Evergreen Consortium is soliciting quotations for ILS (integrated library system) hosting and management services and support. Any agent must not only meet the requirements set forth in this Request for Quotation (RFQ), but must also be flexible and scalable in order to meet its future business and technology needs.

## CONSORTIUM MISSION:

Missouri Evergreen brings together Missouri Public Libraries to strengthen and promote excellent library services to our member libraries and Missouri citizens. The Consortium helps realize the potential of member libraries by resource sharing, cost savings, and member collaboration.

## HISTORY AND GENERAL INFORMATION

The Missouri Evergreen consortium formed in the summer of 2012 as a way to increase cost-effective resource sharing among Missouri public libraries. Member libraries share an integrated library system (ILS) based on the open source Evergreen software. This allows patrons and staff at member libraries to request books from other member libraries as though they are two branches of the same library system.

Since its inception in 2012, the consortium has added 5-6 libraries per year with the ultimate goal of serving citizens throughout most of the state of Missouri. Access and links across the State of Missouri with patron initiated holds for interlibrary borrowing and lending among the member libraries is the purpose of the Consortium with savings in collection development, cooperative cataloging, space, and staffing. Additional savings may be realized through shared purchases that enhance the usefulness by patrons of the Consortium's shared catalog.

## DESCRIPTION:

Four libraries founded Missouri Evergreen Consortium in the summer of 2012. In the 7 years since that time, the consortium has grown to include 42 libraries that are online and additional six public libraries with signed MOU's to transition in 2019 and 2020.

The Consortium collection size is approximately 1.4 million bibliographic records representing over 3.0 million items of books, audiobooks, eBooks, serials, comics, graphic materials, archives, video, music, streaming media, etc. making this the largest shared or system collection in Missouri.

Materials are provided by 42 libraries representing the spectrum of municipal, county, and regional libraries across the State of Missouri. The population served is spread throughout the entire state of Missouri within the consortium’s public libraries with 604,924 registered borrowers as of October 29, 2018. There are currently six libraries who have signed a Memorandum of Understanding with Missouri Evergreen, two of which will be migrated prior to August 31, 2019

Missouri Evergreen uses Evergreen, an open source fully integrated ILS system with cataloging, circulation, OPAC, and acquisitions modules employed by member libraries. Libraries use a combination of Z39.50 and OCLC Connexion for cataloging services. Deduplication of records is handled through the member libraries utilizing reports run by Vendor staff with member library catalogers reconciling record duplication. Authority control is contracted with MARCive; this contract runs for three more years.

**MISSOURI EVERGREEN EXECUTIVE COMMITTEE:**

This RFQ comes from the Executive Committee whose members are responsible for developing, reviewing and recommending this RFQ:

- Colleen Knight, Chair of Missouri Evergreen, [cknight@polkcolibrary.org](mailto:cknight@polkcolibrary.org)
- Cathy Dame, Vice-Chair of Missouri Evergreen, [cdame@lebanon-laclede.lib.mo.us](mailto:cdame@lebanon-laclede.lib.mo.us)
- Sue Lightfoot, Treasurer of Missouri Evergreen, [director@carrolltonlibrary.com](mailto:director@carrolltonlibrary.com)
- Kathy Condon-Boettcher, Secretary of Missouri Evergreen, [kcondon@cityoffestus.org](mailto:kcondon@cityoffestus.org)

Based upon the discussion at a Missouri Evergreen membership meeting in June 2018, the State Library will contract directly with Missouri Evergreen for the delivery and payment of ILS services to the membership and for the growth of the Missouri Evergreen Consortium beginning the fiscal year 2020. Missouri Evergreen’s status as a 501(c)3 makes this possible.

**THE EXECUTIVE BOARD OF THE MISSOURI EVERGREEN CONSORTIUM:**

<b>Member</b>	<b>Library</b>	<b>Email</b>
Colleen Knight (Chair)	Polk County Library	cknight@polkcolibrary.org
Cathy Dame (Vice-Chair)	Lebanon-Laclede County Library	cdame@lebanon-laclede.lib.mo.us
Sue Lightfoot (Treasurer)	Carrollton Public Library	director@carrolltonlibrary.com
Kathy Condon-Boettcher (Secretary)	Festus Public Library	kcondon@cityoffestus.org
Steve Campbell (Member-at-Large)	Scenic Regional Library	swcampbell@scenicregional.org

Rachael Grime (Member-at-Large)	Little Dixie Regional Library	director@little-dixie.lib.mo.us
Dan Brower (Member-at-Large)	Cass County Public Library	browerd@casscolibrary.org
Sue Szostak (Member-at-Large)	Poplar Bluff Municipal Library	szostak@poplarbluff.org
Terri York (Member- at-Large)	Webster County Library	tyork@webstercounty.lib.mo.us
Ron Eifert (Ex-Officio, Cataloging Committee Chair)	Sikeston Public Library	reifert@sikeston.lib.mo.us
Michelle Swane (Ex- Officio, Circulation Committee Chair)	Ozark Regional Library	swanem@ozarkregionallibrary.lib.m o.us

Any questions regarding this Request for Quotation may be addressed to Colleen Knight, Polk County Library, [cknight@polkcolibrary.org](mailto:cknight@polkcolibrary.org) AND Kathy Condon-Boettcher, Festus Public Library, [kcondon@cityoffestus.org](mailto:kcondon@cityoffestus.org).

#### MISSOURI EVERGREEN CONSORTIUM MEMBER LIBRARIES:

Missouri Evergreen is entering its seventh year and comprises 48 member systems--42 live on Evergreen--representing over 100 locations, containing more than 3,000,310 items, 1,417,388 bibliographic records, and over 604,924 patrons as of end of October, 2018.

Missouri Evergreen Consortium member libraries are:

- |                                  |                                      |
|----------------------------------|--------------------------------------|
| Albany Carnegie Public Library   | Festus Public Library                |
| Bollinger County Public Library  | Grundy County Jewett Norris Library  |
| Camden County Library District   | Howard County Public Library         |
| Cameron Public Library           | Jefferson County Library             |
| Carrollton Public Library        | Lebanon-Laclede County Library       |
| Carthage Public Library          | Little Dixie Regional Libraries      |
| Caruthersville Public Library    | Livingston County Library            |
| Cass County Library              | Marion County Library Subdistrict #1 |
| Crawford County Library District | Marshall Public Library              |
| De Soto Public Library           | Mountain View Public Library         |
| Doniphan-Ripley County Library   | North Kansas City Public Library     |
| Douglas County Library           | Ozark Regional Library               |
| Dulany Memorial Library          | Polk County Library                  |

Poplar Bluff Municipal Library  
 Pulaski County Library  
 Riverside Regional Library  
 Salem Public Library  
 Scenic Regional Library  
 Schuyler County Library District  
 Sikeston Public Library  
 Ste. Genevieve County Library

Stone County Library  
 Texas County Library  
 Trails Regional Library  
 Washington Public Library  
 Webb City Public Library  
 Webster County Library  
 Willow Springs Public Library  
 Wright County Library

Continued growth with signed MOU and transition pending as of April, 2019:

Ray County Library	projected migration April 2019
Seymour Community Library	projected migration July 2019
Heartland Regional Library	projected migration October 2019
Montgomery City Library	projected migration December 2019
Oregon County Library	projected migration February 2020
Barry-Lawrence Regional	projected migration 2020

**TIMELINE:**

<b>Event</b>	<b>Date</b>
<b>RFQ Released</b>	<b>April 15, 2019</b>
<b>Pre-Submittal Questions</b>	<b>May 7, 2019</b>
<b>Due Date of RFQ</b>	<b>May 15, 2019</b>
<b>Top Vendors Review</b>	<b>May 15-June 15, 2019</b>
<b>Final Selection of Vendor</b>	<b>June 15, 2019</b>
<b>Desired Begin Date</b>	<b>September 1, 2019</b>

**SCOPE OF WORK**

The Missouri Evergreen Consortium, as a non-profit organization, seeks a vendor who will host and manage an Evergreen integrated library system (ILS) and the servers on which the Missouri Evergreen Consortium’s catalog is run. The vendor will maintain the operating system, and related programs; perform regular backups; monitor network connectivity; monitor system performance, assists with implementation of third party vendors such as MARCive, Novelist, Syndetics, or other vendors that Missouri Evergreen Executive Committee directs. These services enhance the libraries’ services making the public side of services viable for users. The vendor will ensure that

member libraries have appropriate access required to manage the Evergreen system. The vendor will perform all work necessary to extract, process, and migrate new member library data from the from their existing ILS servers to the consortium ILS server. Specifically, the vendor will provide:

- A. **SYSTEM SERVICES:** The vendor provides, or contracts to provide, the following services in support of library operations. Such services apply to the operations and maintenance of all servers, services, or computer systems hosted or managed by vendor
  - a. **Availability:** All systems will be available to users 24 hours per day, 7 days per week, 52 weeks per year, except during scheduled system maintenance times. In the event that it is necessary to schedule downtime on an Evergreen system for any reason, vendor will inform the affected library as far in advance as possible. In the case of an unscheduled downtime, the vendor will inform the library of the problem and anticipated expected time of resolution.
  - b. **Environment:** Vendor will acquire and maintain hosting of the Evergreen system. Vendor also ensures that disaster recovery guidelines and procedures are in place.
  - c. **Monitoring:** Basic operational monitoring and periodic testing of systems for proper functioning is provided for all Evergreen systems. A monitoring system contacts the on-call manager when error conditions or security issues are detected.
  - d. **Software Maintenance:** Vendor performs routine software maintenance tasks to ensure maximum operational efficiency of the Evergreen software. New Evergreen software releases or upgrades are installed in as timely a manner as possible with appropriate prior communications to the Evergreen Executive Board. Testing for Evergreen software updates and new software products is conducted by vendor prior to implementation. Bug fixes will be addressed as time permits and as dictated by the severity of impact.
  - e. **Software Enhancement by 3<sup>rd</sup> party vendors:** Vendor shall install and help libraries implement new modules and features in a timeframe mutually agreed to by Missouri Evergreen Executive Board and vendor.
  - f. **Report Generation:** Working with the Missouri Evergreen Reports Committee, vendor will customize and refine reports based on requests from the Consortium in a timely manner.
  - g. **Catalog Cleanup Assistance:** Vendor will submit records to MARCIVE or other 3<sup>rd</sup> party vendor for authority control. Vendor will run reports to evaluate the Consortium catalog and identify issues such as duplicate bibliographic records, mismatched bibliographic records, and other record errors and give them to the Consortium to help local catalogers.
- B. **DATA MIGRATION SERVICES:** Vendor will provide data migration services for a minimum of five (5) Missouri Evergreen Consortium member libraries per year.
  - a. A bibliographic record merge algorithm will be reviewed and approved by the Consortium before implementation.
  - b. Vendor will conduct site visits to migrating libraries in or to:
    - i. Begin reviewing data extraction process.
    - ii. Test the Internet connection speed
    - iii. Set up training, migration preview, and go-live dates
    - iv. Install the migration server staff client
    - v. Discussion of library's current workflows, policies and reporting needs
    - vi. Fill out documentation for setup of the library's accounts on Evergreen server including: Library Information, Borrower Types, Circulation Modifiers and Mapping, Holds Policies, Patron Field Mapping, Status Codes

Mapping, Circulation Matrix, Copy Field Mapping, Notices, SIT Products, Library Settings, Closed Dates, and Reports

- c. Vendor will apply bibliographic record merge program for incoming bibliographic records from new consortium members. If requested by the Consortium Cataloging Committee, vendor will provide access for up to ten (10) business days as needed to test data for record quality prior to adding the records to the Consortium catalog.
- C. **HELP DESK:** Vendor will operate a Help Desk to receive and resolve reports of problems affecting all of the systems hosted or managed by vendor. When a problem is reported, Help Desk staff will record and analyze the problem, take action to resolve it, and provide updates on the status of its resolution as necessary.
- D. **TRAINING:** Vendor will provide the following training for Consortium member libraries:
  - a. Training for member libraries about to migrate to the Evergreen System:
    - i. Basic Reports (1.5-2 hrs.)
    - ii. OPAC, Circulation, Offline (6-7 hrs.)
    - iii. Cataloging using Evergreen (4 hrs.)
    - iv. Advanced Reports and Local Administration (1.5-2 hrs.)
    - v. Acquisitions, if required
  - b. Follow up training at 6 months for newly migrated libraries
  - c. Training for library staff when justified by collective demand
  - d. Training for new software releases when the size or complexity of the release warrants it
  - e. Computer-based training, such as mini-sessions, intended primarily to refresh knowledge
  - f. Create and maintain training documentation covering all features of the Evergreen system and how to use them. Such documentation, or links to documentation, is made available to the Consortium for posting on website
- E. **NETWORK CONNECTIVITY:** Vendor will provide broadband network connectivity to all the computer hardware used to support the systems it hosts or manages. Network connectivity from Consortium member locations to the Internet is the responsibility of each Consortium member.
- F. **ATTENDANCE AT MEETINGS:** The vendor will attend quarterly meetings (in person, email, or via conference call or sessions) with the Executive Board and/or General Membership or their designee informing them of updates and/or changes to the Evergreen System, migrating libraries, or any other aspect that needs reported both verbally and in writing. Vendor will also make available staff to attend certain committee meetings upon request, specifically Cataloging Committee, Circulation Committee, OPAC Committee, and Reports Committee.

#### OPTIONAL SEPARATE UNIT OF WORK

Additionally, as Missouri Evergreen Consortium sees continued growth, the Executive Committee will consider the vendor providing Website Development and Maintenance as a separate unit of work. The Website provides updated membership lists, migration schedules, information on new Evergreen software releases, statistical reports on resource sharing in the Consortium, contact information of the persons that libraries interested in joining can contact, the minutes of membership and Executive Board meetings, member resources, training and other documentation, and other items as determined by the Missouri Executive Board. A bid for this must be listed separately.



## VENDOR INFORMATION COMPANY PROFILE

- A. Describe your company, including its history, origin, and any affiliation to other corporate entities. Provide the owners' and/or principal officers' names and any other pertinent information.
- B. If the company is currently for sale or involved in any transactions to expand or to be acquired by another organization, please explain.
- C. Describe the company's involvement with library-related organizations and standard organizations.
- D. Describe the procedure for developing new customers and features, including how customer input is taken, evaluated, and weighed.
- E. Vendor provides company statement of non-discrimination.

## STRATEGIC PARTNERSHIPS

List any partnerships with third-party Vendors, including a brief description of the services they provide.

## FINANCIAL DATA

Please provide financial information sufficient to satisfy Missouri Evergreen of the vendor's financial stability.

## COMPANY CONTACTS

Provide a list of organizational officers directly involved in the product being bid, with their backgrounds and credentials. Identify the number and location of sales and support personnel accessible to the Missouri Evergreen Consortium Executive Board.

## USER GROUPS

Provide contact information for users groups, including website or listserv addresses. Provide the URL for any website that provides information on the company, press releases, and product information that is relevant to this proposal.

## CUSTOMER REFERENCES

At least three references of comparable size consortia must be submitted. Include entity name, current contact names with titles, email addresses and phone numbers.

- A. One from a similar type of library/consortium to Missouri Evergreen (e.g., public or academic libraries)
- B. One from a longtime customer (six years or more)
- C. One from a new customer (started within last six- twelve months)

## SUBMISSION OF PRICING

Bidders are requested to use separate page or pages, clearly labeled "Pricing Structure", as part of the vendor's proposal.

All prices should be supplied including initial costs, ongoing costs, report costs, file transfer costs, and delivery or shipping. Annual costs should include yearly percentage increase, if any. List separately any additional charges to be considered separately.

If additional services, not requested by this proposal, are being recommended by the bidder, they must be listed separately and not be figured into the total.

Describe the options for payment of invoices, e.g., credit card, check, electronic transfer for vendor services by the consortium.

## EVALUATION AND SELECTION CRITERIA

The Executive Committee will recommend and Executive Board will select the successful proposal based upon several evaluation facts including features as outlined in the RFQ, company stability, references, and price. The selection of finalists and the final award will be decided based on the proposal submitted by a qualified vendor that best meets the needs of the Missouri Evergreen Consortium as determined by the Executive Board. The Missouri Evergreen Consortium Executive Board reserves the right to reject any or all proposals.

The RFQ will be evaluated and weighted according to the following criteria:

- A. Understanding of mandatory project requirements and ability to meet them: 45 maximum points.
- B. Ability to comply with highly desirable project requirements: 5 maximum points.
- C. References; staff qualifications and experience: 15 maximum points.
- D. Price of product: 35 maximum points.

## SUBMISSION OF PROPOSAL:

Proposals may be submitted in the following formats: hard copy print and/or email not

1. Email address for submission of electronic bids: [cknight@polkcolibrary.org](mailto:cknight@polkcolibrary.org) AND [kcondon@cityoffestus.org](mailto:kcondon@cityoffestus.org).
2. Address for submission of printed bids:  

Colleen Knight, ME Executive Board Chair  
% Polk County Library  
1690 West Broadway  
Bolivar, MO 65613  
AND  
Kathy Condon-Boettcher, ME Secretary  
% Festus Public Library  
400 Main St.  
Festus, MO 63028
3. Any questions requiring clarification of bid submission should be directed to the purchaser, Missouri Evergreen, Colleen Knight, Executive Board Chair 417-326-4531 [cknight@polkcolibrary.org](mailto:cknight@polkcolibrary.org) OR Kathy Condon-Boettcher, Secretary, 636-937-2017, [kcondon@cityoffestus.org](mailto:kcondon@cityoffestus.org).
4. All bidders will be copied via email on the questions and the responses.

5. Pre-Submittal Questions: The closing date for inquiries is five working days prior to bid opening which will be May 7, 2019. The Missouri Evergreen Consortium Executive Committee and/or Executive Board must receive questions no later than May 7, 2019 to enable the Executive Committee Chair to respond. Failure to request clarification of any inadequacy, omission or conflict will not relieve the Vendor of responsibility.
6. Any conditions which the bidder wishes to stipulate other than those included in this RFQ must be specifically stated in writing in the bidder's cover letter. If the bidder cannot accept a provision of the RFQ, it must also state in the cover letter the RFQ number of the unacceptable provision. All requested forms must be completed and submitted with the RFQ response. Any supporting literature that the bidder wants to include should be placed in an appendix.
7. The response should include the numeration of all the specifications put forth in the RFQ and should include the original wording.
8. An electronic version of this RFQ is available at: [www.libraries.missourievergreen.org](http://www.libraries.missourievergreen.org)
9. Proposals should be prepared simply, providing a straightforward, concise delineation of the capabilities necessary to satisfy the requirements of the RFQ. Emphasis in the proposals should be on completeness, clarity of content and adherence to the presentation structure required by this RFQ. Costs for developing proposals in response to the RFQ are the obligation of the vendor and are not chargeable to the Missouri Evergreen Consortium.
10. All proposals and accompanying documentation will become the property of Missouri Evergreen Consortium and will not be returned.
11. RFQ Amendments – The Missouri Evergreen Consortium reserves the right to request clarification on any proposal or to ask respondents to supply any additional material deemed necessary to assist in the evaluation of the proposal.
12. The Missouri Evergreen Consortium reserves the right to change the RFQ schedule or issue amendments to the RFQ at any time. The Missouri Evergreen Consortium also reserves the right to cancel or reissue the RFQ.
13. Rejection of Proposals - The Missouri Evergreen Consortium reserves the right to reject any or all proposals, to waive any minor informalities or irregularities contained in any proposal, and to accept any proposal deemed to be in the best interest of the Missouri Evergreen Consortium.
14. Proposal Validity Period - Submission of a proposal will signify the vendor's agreement that its proposal and the content thereof are valid for 180 days following the submission deadline and may be incorporated into any final agreement that is negotiated between the Missouri Evergreen Consortium and the successful vendor.
15. Disclaimer - The Missouri Evergreen Consortium Executive Board reserves the right to share, with any consultant of its choosing, the RFQ and any resultant proposals in order to secure expert opinion.
16. Non-Obligation - Receipt of proposals in response to the RFQ does not obligate the Missouri Evergreen Consortium in any way. The right to accept or reject any proposal shall be exercised solely by the Missouri Evergreen Consortium Executive Board. The Missouri

Evergreen Consortium Executive Board shall retain the right to abandon the proposal process at any time prior to the actual execution of a contract with a vendor, and the Missouri Evergreen Consortium Executive Board shall bear no financial or other responsibility in the event of such abandonment.

17. Public Disclosure - All materials provided to the Missouri Evergreen Consortium by Vendors are subject to Missouri State's public disclosure laws.