

FINAL REPORT – CORE TEAM

PASADENA & GLENDALE LIBRARIES

ILS PROCUREMENT PROJECT

NOVEMBER 25, 2013

THE OVERALL PROCESS

The Pasadena Public Library and the Glendale Library, Arts & Culture Department began their ILS procurement process by hiring a consultant, Melissa Stockton. After the consultant was hired, each library put together a group of staff, with a wide variety of expertise from different areas of the library, and the Core Team was created. Each Library appointed a Project Manager to coordinate and lead work throughout the process, Alyssa Resnick (Glendale) and Brigida Campos (Pasadena).

The next step was to have a group of meetings with staff from both Libraries to review eight sets of functional requirements provided by the consultant. The Core Team members attended all of the needs assessment meetings along with staff with specific expertise from both Libraries. The meetings for the needs assessment portion of the project were held in May 2013.

The needs assessment meetings helped to determine the most important functionality for the Libraries. The functional requirements which came out of these meetings formed the functional sections of a Request for Proposal (RFP) which was released on August 1, 2013. The Core Team was responsible for editing the content of the RFP, with the Project Managers playing a major role in the review and finalization of the RFP document. Responses to the RFP were due September 9, 2013. The RFP was issued from the City of Pasadena.

Five proposals were received in response to this RFP. Each response was reviewed and scored by each member of the Core Team. The scores and group discussions were used to determine the top three vendor candidates for a new ILS solution. At this stage two vendors were removed from further consideration and three remaining vendors were asked to visit Pasadena and Glendale to provide an on-site demonstration of their software. The three

vendors that were selected for further evaluation were Innovative Interfaces, Polaris, and SirsiDynix. Summary information for this scoring from the Core Team is included later in this document. The top three vendors were informed of the decision in early October and demonstrations were set up for the last week of October, 2013.

Three separate demonstration meetings were set up with each of the three top vendors. The first meeting included information related to system administration and reports. These meetings were held as webinars set up by the vendors and attended by a subset of the Core Team. Full day demonstrations on-site were set up for the vendors to demonstrate functionality in the circulation and collection management areas for what is currently in release. A short amount of time was dedicated at the end of the demonstrations to allow the vendor to demonstrate and discuss what enhancements or new products they are working on. A third meeting was conducted with two of the vendors as a “deep-level technology” meeting to address specific questions concerning the vendor responses to the IT questionnaires which had been included in the RFP process. These IT-specific meetings were held only if the IT groups had additional questions about the technical infrastructure and configurations proposed. These webinar-based meetings were attended by selected Core Team members as well as staff from the IT groups from each of the Cities. Simple evaluation forms were made available for the system administration and other functional demonstration areas. Summary scores from these evaluations are included later in this document.

The Project Managers were given the responsibility for performing reference checks on the top vendors. References that were contacted represented libraries of similar size and complexity.

The Core Team met to discuss the top three vendors and the accumulated information they had about each of them. After a great deal of discussion, the group came to a unanimous decision, selecting Innovative Interfaces.

The rest of this document contains information regarding the specific scoring and evaluations done during this procurement process. Summaries of the main discussion points for each of the three top vendor systems are also included.

RFP REVIEW

The RFP contained over 300 individual items related to functionality. These items were grouped into eight sections, shown in the table below. The scores from the Core Team are also included in the table below. The RFP contained a pricing section as well as a questionnaire from the Pasadena Department of Information Technology, related to details in a vendor hosted environment; however, these sections were not included in the initial scoring process.

Each section of the RFP was given a specific weight. The items within each section were also weighted, using the High, Medium, and Low priorities assigned to each item by the Core Team. The group scored each item on a defined 0-5 scale. The Collection Management section included items related to Cataloging, Acquisitions, and Serials modules within each system. The sections for Local Business and Small/Micro Business were a requirement of the City of Pasadena’s RFP process.

1st Place

2nd Place3rd Place

	High Score	AutoGraphics	Infor	Innovative	Polaris	SirsiDynix
General	10.00	8.17	9.43	8.89	9.31	8.89
Collection Management	15.00	11.88	13.37	14.62	14.28	14.21
Circulation+	20.00	17.53	17.54	19.15	18.25	18.34
Public Interface	20.00	16.43	17.34	18.18	17.91	16.12
Systems/IT/Admin	10.00	8.52	8.86	9.41	9.38	9.37
Reports	5.00	4.01	4.78	4.77	4.77	4.87
Vendor Stability, etc.	5.00	4.78	4.65	4.76	4.99	4.87
Migration/Support	5.00	4.60	4.64	4.96	4.98	4.83
Local Business	5.00	0.00	0.00	0.00	0.00	0.00
Small/Micro Business	5.00	0.00	0.00	0.00	0.00	0.00
TOTAL	100.00	75.92	80.61	84.74	83.87	81.5

Innovative Interfaces scored highest in four of the sections and came out with the highest score over all. Polaris came in second in overall score, followed by SirsiDynix. The Core Team indicated that the scores reflected their evaluations of each proposal appropriately.

VENDOR DEMONSTRATIONS

Vendor demonstrations were held the week of October 28, 2013. All three vendors were asked to follow the same schedule, shown below. SirsiDynix provided their demonstration on Tuesday, October 29th, Innovative Interfaces demonstrated on Wednesday, October 30th and Polaris demonstrated on Thursday, October 31st. All three vendors were provided with a number of items that the Libraries wished to see demonstrated in each module area, however, they were not given a detailed script.

Full-day, Onsite Demonstration Schedule

Time	Demonstration Topic
7:30 – 8:00 am	Technical Set up
8:00 – 8:20 am	Meet with Directors
8:20 – 8:30 am	Finish demo set up/move to demo room
8:30 – 10:00 am	Discovery
10:15 am – 12:15 pm	Circulation
12:15 – 1:30 pm	Lunch (on your own)
1:30 – 3:30 pm	Collections (Acquisitions, Serials, Cataloging)
3:30 – 3:45 pm	Break
3:45 – 4:30 pm	Demo what is coming soon
4:30 – 5:00 pm	Discussions with Core Team

The Core Team was asked to attend all three days of vendor demonstrations. Staff from both Libraries was invited to attend the demonstrations as well. The Directors from each of the Libraries were also able to attend all three vendor demonstrations. All attendees were asked to complete a survey following each day of demonstration. The surveys were divided by modular area and the summarized scores are displayed below.

Demonstration Evaluation Summary

	Innovative	Polaris	SirsiDynix
Acquisitions	4.39	3.60	2.98
Cataloging	4.39	3.68	2.98
Circulation	4.76	4.05	3.53
Discovery/Public Interface	4.68	3.86	3.19
Serials	4.57	3.75	3.14
System Administration	4.54	4.09	3.21

Those staff members who had been able to attend demos from all three vendors were also asked to rank the vendors at the end of the demonstration period. The final rankings from all module groups was Innovative Interfaces as number one, Polaris as number two, and SirsiDynix as number three. These final rankings matched the individual evaluation numbers that were collected and also matched the scores from the RFP responses.

FINAL SELECTION

The Libraries embarked on this ILS procurement with a number of goals in mind. The goals included selecting a system which would allow the two libraries a great deal of autonomy to serve their unique communities better, while also offering them a variety of methods for sharing their resources. Improving the public interface to their system, increasing the patron self-service capabilities and integrating more content into the search interface for patrons were also important goals. They also wanted to select a system that would help improve their workflows and provide a stable and flexible staff interface. The Libraries were interested in moving to a vendor hosted environment which would place the servers and computer operations under the vendor's control.

SIRSIDYNIX

SirsiDynix proposed the Symphony system in their response to the RFP. The Core Team scored this system in third place following the RFP review. Symphony has much of the functionality desired by the Libraries, as evidenced by the RFP scoring. Symphony was not selected as the top solution for several reasons. The Symphony staff interface was seen as confusing, hard to navigate, and containing too many process layers by the Core Team and other staff attending the full-day demonstrations. The System Administration evaluation brought out the need to run a number of processes overnight and the need to make some basic updates to data in the system through the running of separate and multiple reports. Although the Library staff felt there were some nice features included in the public interface/discovery layer, they felt the screens were fairly confusing for patrons and that the module did not include the links to social media and other patron self-service features as they wanted.

The Core Team provided an objective and fair review of the system proposed by SirsiDynix; however, it was evident during the on-site demonstration day that a number of staff from both Libraries lacks confidence in the company's ability to follow through on promised developments. Symphony has been on the market for a number of years and SirsiDynix is poised to release a new ILS solution which promises web-based clients and a standards accessible core. The problem is that this new system is not ready to be released and so remains "in development." The Core Team was extremely hesitant to select a solution based on functionality not yet in production.

POLARIS

The proposal submitted by Polaris was scored as number two by the Core Team. The functionality within the Polaris system is very specific to public libraries and was developed to support multiple libraries in one installation from the beginning. There were several reasons why Polaris was not selected as the top vendor. The System Administration aspects of the system were thought to be very clear and simple to use and understand. The staff clients for the Polaris system were seen as older technology, with too many open windows and unclear icons. The most common remarks from staff indicated that they did not see the look-and-feel of the Polaris staff client as a progression or improvement on the current ILS staff client. Although Polaris is working on a web-based staff client, it will not be available for all of the staff functions for 18-24 months. There was some concern in the Core Team with the underlying structure of the Polaris system being Microsoft SQL and Microsoft servers, the resources this would require and the lack of flexibility it may represent. The public interface was sophisticated and simple and incorporates a great deal of social networking tools, however, Polaris does not currently include results from periodical databases and other online resources in the basic catalog search.

The largest issues raised about the Polaris system are the set-up, requirements and methods for accessing the system through a vendor hosted environment. Staff access requires a Remote Desktop Application that many felt would be confusing to staff and requires more maintenance on-site than other vendor hosted solutions. IT staff felt that the need to “remote” into the staff client on the server was inefficient, risky in terms of security, and a high-bandwidth consuming solution. Library and IT staff also had concerns about the response time and potential issues involved with connecting to their ILS environment in the single New York hosting facility currently utilized by Polaris.

INNOVATIVE INTERFACES

Innovative Interfaces proposed the Sierra system with an Encore discovery layer in their RFP response. They received top scores from the Core Team for their proposal, coming out on top in 4 of the 8 sections. These high scores reflect the great amount of basic functionality available in the Innovative system. The System Administration area of the system is not currently maintained through a single interface; however, Innovative has a web-based Administrative interface for some functions and will eventually incorporate all of the functions into this area. The Core Team felt that the Sierra interface was clear, clean and intuitive. Encore, the discovery layer proposed by Innovative was well received by all Library staff, specifically due to the integration of periodical databases and other online resources as well as many social networking tools and patron self-service options.

The vendor hosting solution offered by Innovative was acceptable to the IT staff from both Cities and does not require the library to run any special connection hardware or software at the library. The integration of other modules such as the web-based Decision Center for management statistics was also seen as a plus since the Libraries would not be required to work with a 3rd party vendor for this functionality and would be able to utilize data directly from their live system instead of sending data to a 3rd party for inclusion.

CORE TEAM MEMBERS

The members of the Core Team represent staff from throughout the library and were selected for their specific areas of expertise. The group put a great deal of thought and time into this process. The Project Manager at each site was given an even greater amount of responsibility throughout the procurement. Although listed below, the Directors of the Libraries were not a part of the Core Team but made up the Executive Team during the selection process.

PASADENA PUBLIC LIBRARY

Director: Jan Sanders, Director

Project Manager: Brigida Campos, Librarian III, Collection Services

Jennifer Addington, Deputy Director

Martha Camacho, Central Library

Shauna Redmond, Virtual Services Manager

Pablo Oliva, Virtual Access

GLENDALE LIBRARY, ARTS & CULTURE

Director: Cindy Cleary, Director of Library, Arts & Culture

Project Manager: Alyssa Resnick, Administrator, Circulation, Information Technology, Technical Services

Project Manager Stand-in: Robert McHugh, Technical Services Supervisor

Nora Goldsmith, Administrator, Library Services & Programs

Kevin Sarian, Library Information Technology Services Supervisor

AUTOMATED CONTROL SYSTEM (ACS)

Amber Steinhart, System Administrator

Barbara Ayala, Management Analyst V, Library Operations Manager