Request for Information

Integrated Library System

MAY 2022

V-Cat Consortium

Wisconsin Valley Library System (WVLS)

301 North First Street, Wausau WI

Statement of Intent

WVLS is evaluating integrated library system software to fulfill a goal from its current long-term strategic plan. This is a necessary task that should be undertaken periodically. The purpose is to ensure our organization is providing and will continue to provide the best library automation software that supports the needs of our consortium of public libraries and their patrons. There are many requirements to consider when assessing both our current ILS as well as any potential new one. This document is intended to help collect useful information for these different areas. We appreciate it if you would supply up-to-date and complete information about your product following our timeline below. This will allow WVLS and its stakeholders to identify the best product for our current and future needs. WVLS asks for the right to circulate your company's response internally among our member library staff, and among our partner libraries. The responses will not be a matter of public record but are subject to freedom of information act requests. Submission of a response by your company signifies acceptance of this condition.

WVLS and the V-Cat Consortium

WVLS is primarily funded by the State of Wisconsin, overseen by the Department of Public Instruction, and administered by a 15-member Board of Trustees. It functions as a membership organization - with its membership made up of Clark, Forest, Langlade, Lincoln, Marathon, Oneida and Taylor Counties. WVLS serves 25 administratively autonomous and fiscally independent public libraries in these counties. WVLS administers the V-Cat Library Consortium, which libraries join voluntarily by signing a membership agreement. Two of the libraries have multiple branch locations. There are a total of 36 sites in the V-Cat Consortium. Appendix A includes a list of member libraries along with their service population and a summary of their annual circulations for 2019 and 2021.

The WVLS central office is based within the same building as the Marathon County Public Library's Main Wausau Library located in downtown Wausau, Wisconsin. WVLS Office staff consist of 8.5 full time employees. ILS Maintenance and support staff consist of 2 full time employees plus additional IT support.

WVLS manages the shared library automation system, V-Cat, using Sierra from Innovative as well as Aspen Discovery, supported by Bywater Solutions. Along with the materials of member libraries found in V-Cat, WVLS purchases shared electronic subscriptions such as Gale Courses and Novelist Select and represents its members in the Wisconsin Public Library Consortium (WPLC) which coordinates OverDrive access. OverDrive bibliographic records appear in the V-Cat database.

WVLS also provides all members with the following:
- WVLS administers a wide area network
- Remote authentication services for reference databases that member libraries offer to the public
- Online forms for public requests for new materials
- PC help desk support.
- System-wide email through Microsoft 365
- Website hosting platform

- Coordination of the use of third-party products working with the ILS, including computer management software, RFID software, self-check units, and enhanced content for the online catalog; and telephone and text message notice services

A major service program V-Cat supports is resource sharing across municipal borders within the 7-county area. WVLS contracts and facilitates system-wide delivery service to every member library three days a week. Additionally, 3 libraries receive 4 deliveries a week, and the WVLS office receives 5 deliveries a week.

Overview to the Current ILS

The V-Cat Consortium was formed in 1999 and consisted of two libraries. The V-Cat Consortium formerly utilized SirsiDynix's Horizon software system and migrated to Innovative's Sierra system in 2013. The V-Cat implementation of Sierra is "software only," self-hosted in a private virtualization platform maintained by a partnership of several Wisconsin public library systems. The virtualization platform is or will be made capable of supporting all reasonable hardware requirements necessary to support at least three production implementations of ILS product sets, one for each of the respective consortia supported by partner library systems.

Within the V-Cat database, bibliographic records are shared among members with local holdings represented via attached records. Member libraries are trained to evaluate and import records into the ILS from OCLC daily via the z39.50 protocol. Member libraries are also able to edit and improve records as necessary following local guidelines. Member libraries also can add brief records when an OCLC record does not exist or is unsuitable. Original cataloging is performed when needed by system staff. Spot checking is done on bib records to assist with quality control. Maintaining the integrity of this database structure including how the results display to the public is of utmost importance to V-Cat.

Throughout our library system, our buildings have a total of 5 Bibliotheca self-check units and two self-check units using Innovative's Express Lane. We one building set up with an automatic materials handling (AMH) sorter using 3M - Bibliotheca.

It is important to V-Cat not to lose any existing functionality. Currently the libraries in V-Cat make use of the following functional areas or products:

- Acquisitions including electronic ordering; funds management and invoicing
- Authority control and duplicate record control
- Cataloging management of bibliographic and item records
- Circulation and patron record management
- Circulation notifications for library users offered through email, phone, text, and paper formats
- E-Commerce for online fine payment
- Holds management functionality for both staff and patrons that includes the ability to
    - limit hold placement and hold fulfillment on items by patron type and owning location,
    - freeze and unfreeze holds,
    - designate multiple priority levels for paging,
    - set local hold priority

- ==Inventory management==
- Offline circulation
- Online patron catalog or discovery catalog
- Online library card registration
- Serials management (available, but not currently used)

Instructions for Responding

Sections

This RFI consists of ==eight== sections (see below). Respondents are asked to complete all sections. Some areas feature questions requiring brief responses as well as a checklist. Others only feature the checklist. For Sections VI. Costs and VII. Collaboration, respondents are asked to provide a breakdown of anticipated costs. This information will factor into our group's final decision.

RFI Timeline

By ==June 7, TWO WEEKS==, 2022	Respondents are asked to submit a notification of intent via email to ils.admin@wvls.org
By ==June 14, THREE WEEKS==, 2021	Questions or requests for clarification should be submitted via email to ils.admin@wvls.org
By ==June 24, ONE MONTH==, 2022	Respondents are asked to submit their responses electronically in PDF format and sent to ils.admin@wvls.org
	Select respondents will be contacted to schedule a vendor demonstration consisting of a full day ==or multiple days== broken down by V-Cat designated functional groups. Demonstrations for V-Cat libraries will be completed no later than ==December, 2022.==

I. General Information

A. Please provide a brief history of the library system including information about the following:
1. The majority and minority owners of your company
2. How many years the library system has been in the market
3. If there are any plans for a merger or acquisition
4. Any plans or roadmaps for the library system coming up over the next one-to-five years.
5. The commitment of the majority owners towards on-going support for this library system over the next five-to-ten years
6. The number of public library consortia added between 2016 and 2021 broken down by year, and from which automated system
7. How your library system stands apart from other products with regards to supporting consortia

B. Please describe your library system including information about the following:
1. The client hardware and workstation requirements for optimal performance by the ILS
2. Network connectivity requirements, including sensitivity to network latency and connection disruption for typically expected performance of the ILS.
3. Your model for Software as a Service / cloud hosting
4. The underlying database structure or architecture
5. The database language and whether ILS administrators have direct database access to read or write to the database
6. The number of client workstations running and database size, at your largest consortia
7. The options available for database backup
8. The types of APIs available to third-party applications

C. Please summarize information about your library system with regards to the following:
1. The schedule for new releases and bug-fix releases of your library system in a year's time
2. The software development cycle, including the process used to collect, evaluate, and implement customer-suggested enhancements
3. The process for delivering and applying patches between major software releases
4. The methods for communication available for customers to work with the company during business hours and off-hours

D. Please describe the process for on-boarding new customer, including the following:
1. Describe the extent and the type of staff training provided with implementation
2. Describe the extent of project management services and resources provided with implementation
3. Describe the extent and currency of online training materials the company offers on the library system

II. ILS Functionality Assessment

A. Acquisitions, Serials and E-Resource Management

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Acquisitions					
Ability to create & manage multiple funds and budget tracking, including funds management to support a library consortium with different accounting methods and agencies					
Ability to create funds earmarked as different funding types within system					
Ability to generate fund management reports and statistics for each member library					
Ability to perform fiscal close (end of year rollover) & fiscal open					
Ability to auto-generate and/or schedule reports & statistics on funds management & fiscal data					
Ability to create a funds organizational structure, including funds hierarchies, for ease of use & statistical reporting					
Ability for order records to include all necessary fixed and variable fields for accurate order submission & processing					
Ability to generate, load and submit order records manually and integrated with external vendors, including EDIFACT Ordering					
Ability to automatically queue purchase orders via vendor order loads					
Ability for on orders & in process titles to show on public display					
Ability to generate reports & statistics for each member library's orders					
Ability to search orders using multiple points of access					
Ability to create order records for standing orders					
Ability to auto-generate and/or schedule reports & statistics on order records					
Ability to move, manipulate and cancel orders					
Ability to generate multiple order records & rough bibliographic records using imported data					
Ability to see Order Record history, including users & dates for creations and changes					
Ability to manually add or remove an order from FTP data load					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Acquisitions (continued)					
Ability to import invoices with outside vendors (EDIFACT invoicing)					
Ability to pay invoices via ILS system					
Ability to search for invoices through multiple data points					
Ability to create vendor profiles, including unique profiles for each account within a vendor using fixed and variable length fields.					
Ability to search for vendors through multiple data points					
Ability to interface with outside vendor payment software					
Ability to retrieve a record of adjustments to fund records (fund activity report)					
Ability to allow multi-fund orders fund fixed field to be broken out by percentage or dollar amount					
Ability to allow multiple payments against a single order record in the same session for all order types					
Ability to export more than 1 order file per FTP session to the same vendor					
Ability to view fund balances while ordering without needing to post first					
Ability to import more than one invoice file per FTP session from the same vendor					
Ability to encumber funds at the discount/estimated price					
Ability to allow multiple payments against a single order record in a different session for all order types (partial payments)					
Ability to create and edit vendor codes					
Ability to search invoices (including by vendor and invoice date)					
Ability to delete and/or edit an invoice after posting (to correct an error)					
Ability to view and/or edit the unencumbered amount during invoice entry					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Electronic Resource Management (ERM)					
Ability to manage e-resources either included with ILS or as a separate product					
Ability to manage e-resource licenses					
Ability to load e-resources order & vendor records similar to traditional resources					
Ability to verify URL for e-resources					
Ability to interface and authenticate with publisher web site or resources					
Ability to use APIs to display e-resources without loading them into the database					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Serials					
Ability for system to have distinct serials specific serial records and item records, including bibliographic records, order records, check-in records, holding records					
Ability for efficient functionality of check in record, including check in of a title with volume and issue number.					
Ability to check in and track serials issues/subscriptions for multiple libraries with a library consortium					
Ability to support MARC or non-MARC serial holdings					
Ability to cleanly export serial holdings out of the system					
Ability to use and execute a claims function for serials, including ability to use in submission to external serials vendors					
Ability for granularity with serial permissions to accommodate consortium, including ability for each branch/library to limit visibility to own serials data.					
Ability to make batch check-in record or serial item record changes					
Ability to have 'public notes' on titles that are visible in discovery catalog					
Ability to set up automatic numbering of volumes and issues by title (based on publication pattern)					
Ability to efficiently identify and report late issues					
Ability for software to handle periodical 'supplements'					
Ability to create serials-specific statistics and reports					
Ability to identify status of a volume/issue number as not received, missing, unavailable, etc.					
Ability to link users to previous or future title changes in discovery catalog (CONTINUES, CONTINUED BY links)					
Ability to link users to digital/electronic versions of same title available in discovery catalog					
Ability for order records & associated check-in records to be directly linked					
Availability of a check-in or serial record that includes all necessary fixed & variable fields for accurate processing & reporting					
Availability of a check-in record card that is associated with each check-in record					
Ability to assign holdings or a holdings record to each check-in record					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Serials (continued)					
Availability of limited retention holding statements					
Availability of a routing record for each check-in record					
Ability to automatically sort new item records created at serials check-in					
Ability to view order record and check-in card of the same bib record simultaneously					
Ability to preview spine labels during check-in process					
Ability to automatically merge holdings when a missing issue is checked in					
Ability to generate reports and lists based on check-in box status, including ability to export reports					

B. Cataloging, Authority Control and Records Management

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
General record management for all types of records					
Ability to edit all types of records in groups					
Capability to export/print groups of records or single records					
Ability to toggle back and forth between the backend and public interfaces					
Ability to add text macros as shortcuts					
Availability of duplicate record checking by specified field(s)					
Are navigation options clear and clearly labeled?					
Availability of complete record modification and record deletion history tracking for all record types					
Ability to administratively control ownership and management of all types of records					
Ability to duplicate, print and delete all record types					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Bibliographic record management					
Integration with Bibliographic Formats and Standards					
Ability to handle current RDA fields and future RDA fields					
Ability to bring in records either singly or in batches from a variety of third-party providers					
Ability to easily create, overlay and modify bib records for all material formats					
Ability to easily select, insert and correctly display diacritical marks					
Ability to limit by other index fields when searching in one index					
Immediate indexing of completed records, even when multiple accounts are active concurrently					
Ability to customize indexing					
Ability to quickly check for duplicate ISBNs in the database.					
Is there a way to report bibliographic errors to a central mailbox from within the system?					
Ability to suggest titles in the staff interface when searching if the original search returns no results					
Ability to provide keyword or author search results connecting to the 'Name See From' 400 field in an Authority Record in the staff interface					
Supports searching despite non-English articles that start titles (non-English skip digits)					
Supports searching for titles in a series					
Ability to see and manage/transfer holds while cataloging					
Ability to limit by format, language, date, publisher, audience and owning library					
Authority control management					
Ability to maintain multiple authority thesauri without conflict					
Ability to batch update controlled terms/fields					
Ability to identify and print off or export duplicate, first time use, and/or invalid headings					
Ability to easily identify blind authority records					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Item record management					
Can the system restrict permissions on certain fields in an item record?					
Can on-the-fly items have different permissions and be easily distinguished in the database?					
Does the system use a volume field for items?					
Ability to transfer items between records					
Ability to quickly identify bad codes (mistakes, typos)					
Ability to export/print the lists of codes applying to each controlled field					
Ability to manage codes based on permissions					
Ability to print item spine and book labels from within the ILS					
Ability to customize spine and book labels to meet individual owning library's needs					
Ability to print item labels in batches					
Ability to display call number scroll of a specific member library while creating Cutter numbers					
Ability to manipulate the order in which items display to staff and the public					
Item records include a history of status changes in an item record for past 5 or so changes					
Collection management					
Can the ILS assist selectors with determining nonfiction areas of high and low interest at each physical location?					
Can the ILS help set data benchmarks for when material becomes unusable due to condition without requiring physical examination of every piece first?					
Can it create weeding & missing lists?					
Can it determine the most popular fiction authors for each audience level at each physical location?					

C.   Circulation and Self-Checkout

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Patron Record Management					
Ability to batch update patron records					
Ability to batch extend due date					
Ease of editing patron records					
Ability to have multiple types of patron records (child, adult, temp, educator, institutional, homebound, and other community types)					
Ability to designate internet use permissions for minors					
Ability to view details of patron fines in check out					
Offers needed fixed and variable patron fields (home/residence field, circ active field, etc.)					
New Patron record templates by branch and patron type					
New patron record template can auto-calculate a default expiration date (prefer set by library/location)					
Duplicate record check alert when creating new patron records					
An alert message can notify staff a set number of days before expiration date					
Availability of multiple ways to look up a patron record (barcode, last name, address, e-mail, phone, birthdate)					
Ability to designate a patron's preferred name, and for that preferred name to appear on circulation notices and in patron online interface.					
Ability to add notes (hidden from patron) and messages (hidden from patron but pop-up message to staff) to a patron record					
Ability to allow patrons to opt in for email or SMS notifications such as newsletter or emergency closures					
Can patron records be merged?					
Ability for staff to select a default hold pick up location to any location (not tied their 'home' library)					
Ability to view last patron and circ history on an item record					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Patron Record Management (continued)					
Records the number of times the patron record was used in a given time period (not just the last use)					
Ability to link patrons in the staff interface					
Ability to set parameters to extend select blocks to linked patrons					
Patron records include both a creation date and an updated date					
Is there a signature for user who last updated the patron account					
Ability to view patron's OverDrive use/holds in staff interface					
Holds Management					
Availability of bib-level and item-level holds					
Ability to place item-level holds that page but do not transfer					
Ability for patron to select the default hold pick up location to any location, not limited their 'home' location.					
Ability to change pickup location for a hold already in transit or on a hold shelf.					
Ability for staff to see frozen holds and freeze or unfreeze holds for patrons					
Ability to freeze holds when the item is available or has no holds.					
Ability to see cancelled holds and reinstate cancelled holds					
Ability to batch extend hold pick up dates for a single location (emergency closures)					
Ability to easily exclude locations from filling holds (emergency closures)					
Holds management offered in the patron catalog					
Hold shelf management tools (clear the hold shelf report, current list, pick up date, location)					
Easily generate a list of expired holds on the hold shelf					
Easily generate a report of holds unfilled with available items to fill by either pickup location or owning location					
Ability to format paging lists by library branch					
Ability for patrons to freeze holds and ease of unfreezing					
Staff interface includes OverDrive use/holds information					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Checkin					
Ability to backdate check in date for materials					
Ability to check in with overrides to not fulfill hold or send items in transit					
Ability to waive fines within check in interface					
Ability to edit item from Check In (add note, change status etc.)					
Support (or note added) when checking in damaged items					
Availability of pop-up messages when checking in items to alert staff					
Ability to have warning sounds and/or obvious visual alerts when checking in items					
Ability to toggle from checked in item to patron in Checkout interface					
In transit messages are added to an item record with origin, destination, date and time when the status is updated to in transit via the Check In interface					
Is check-in available in within the patron record/checkout interface?					
Checkout					
Ability to extend or modify the due date during Checkout					
Ability to batch extend due dates for a group of items or patrons (emergency closures)					
A way to mark items lost in patron record AND to mark items damaged					
Ability to block number of items checked out by patron type or other patron record field					
Is there an ability to block number of items by a combination of patron type and type of items					
Is there an implicit check in notification when an item is checked out to another patron?					
Block / warning when a patron tries to check out an item on hold for another patron					
Ability to customize check out receipts and statements of checked out items by location					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Loan Rules Management					
Availability of administrative area that allows for the creation and management of complex loan rules based on patron type, material type, location					
Strength and ease of loan rule management in a consortium					
Ability to sort or group loan rules based on loan rule facets					
Ability to batch update a single facet of selected loan rules					
Notifications					
Delivery methods must include paper, email, and phone					
SMS or text message notifications must be available (included with the ILS or as an add on service), or integrates with Shoutbomb					
Support for Shoutbomb phone notifications, or integration availability with another third-party phone notification system					
Availability of these notice types: overdue, courtesy, hold pickup, statement of charge or bill					
Fines Management and Fines Paid					
Ability to easily collect money and waive charges (no negative balances)					
Ability to accept partial payments or for patrons to select which charges they want to pay					
Ability to assign predefined charges and add new ones to the system					
System retains patron fine payment history for a set length of time with specific information for all charge types					
Availability of fines management tools to review fines paid, review waived fines and globally purge fines by library or by file					
Ability to reinstate manual fines paid or waived in error.					
Ability to reinstate overdue, replacement, and other automatically generated fines paid or waived in error.					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
E-Commerce					
Ability to support e-commerce payment via PayPal credit card payments					
Ability to report on e-commerce payments					
Ability for standalone fine payments independent of the catalog via API or other method					
Ability to integrate e-commerce payment with third-party discovery catalogs such as Aspen Discovery					
Online Patron Registration					
Availability of an online self-registration form included with the ILS or as an add-on product.					
Online patron registration form is customizable					
Online patron registration form performs duplicate record checking against the patron database using more than one field along with the patron name field					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Paging Slips for Holds					
Availability of customizable paging slips for bib and item holds management					
Availability of transit slips					
Availability of hold shelf slips that are customizable					
Availability of date due and receipt slips					
Ability to restrict frozen holds from showing up on paging slips					
Self-Checkout / SIP2					
SIP2 integrated into the ILS package (no licenses)					
The ILS product supports a variety of self-check vendors. (Currently in use/under consideration: Bibliotheca/3M, Logitech, Envisionware and related AHMs)					
Availability of ILS information tied to SIP2 management					
Ability to select receipt paper options and formats (none, paper, email)					
Integration with self-checks for date due receipt format (email and text)					
Offline Circulation					
Availability of offline circulation processes					
Availability of offline circulation documentation					
Patron API					
System communication with for patron sign on to PC management system (Currently Cassie and Pharos in use.)					
System communication with OverDrive for patron authentication					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Inventory					
Availability of inventory functionality either included with the ILS, as an add-on product, or via integration with a third-party vendor					
Availability of statistical reports and fields tied to inventory					
Inventory functionality separated out by branch library					
Miscellaneous					
Collection Agency functionality offered with consortia support, or integration with Collection Agency such as Unique Management					
Ability to see information a userid, date/time stamp on transactions (e.g., new card set up, card last updated, item record changes, etc.)					
Support for multiple custom item statuses					
Ability to set items in transit between locations and have an item status that indicates this					
Ability to designate an item as 'damaged', 'in repair', 'in bindery'					
Ability to add notes and messages to item records					
Support for RFID tags on materials					
Support for old or new item and patron barcode labels					
Availability of reciprocal borrowing statistics for a consortium to track usage of owning and non-owning items					
Interlibrary Loan					
Interlibrary Loan functionality is included with the ILS or offered as an add-on product					

D. Reports and Statistics

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Ability to create canned and custom reports at branch/location level and at consortia level					
Ability to create canned and custom reports for circulation and hold transactions					
Ability to edit lists or reports directly in the ILS					
Ability to edit records in reports without exiting from the report					
Ability to export reports in a variety of formats					
SQL reporting or some other equivalent					
Ability to create custom queries					
Ability for reports to interface directly in the discovery catalog					
Reporting allows for automatic charts/images to be output to facilitate dashboards for libraries					
Ability to limit access to reports/reporting tool(s) by user sign on					
Can reports be shared directly in the ILS or must they be removed to be shared?					
Ability to save, edit, and re-run custom reports					
Ability to schedule regularly run reports					
Unlimited or very large capacity for the number of reports at any given time					
Analytics support a consortium of different libraries					
Offers several different reports of use to a single library and a consortium					
Statistical reports are able to be modified before printing					
Statistical reports can be printed directly from the ILS					
How many factors can be run on all record types					
Statistical reports can be run on all record types					
Statistical reports can be exported into Excel, not just a text (.csv) format					
Ability to create collection development reports that accommodate a consortium and local call numbers					
Ability to track in-house statistics for item records					
Ability to modify report facets in the interface to compare results					
Item records contain yearly cumulative checkout totals for current and past year automatically (without modifying a record's last updated date)					

E.   Systems Administration & Authentication

Please provide a brief description of the following functions or features:

1. The main features of the administration module

2. The level of access to the database for consortium staff

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Documentation and Training					
Availability of a current manual that covers the entire library system and its different functionality					
Company provides in-person staff training					
Availability of additional/ongoing training					
Company provides online training materials on system administration functions					
Availability of a test server / sandbox					
Customizable manual template that can be modified to note local/current practices.					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Systems Administration					
System can accommodate record and workflow set up for multiple libraries and multiple branches					
System allows for the customization of some amount of fixed and variable length fields in all types of records					
System allows for patron and item barcodes of varying lengths. Currently our patron barcodes or school IDs range between 6-digits and 14 digits and have different prefixes. Our item barcodes are 14 digits in length and tend to start with 352.					
System accommodates z39.50 record searching and record loading from outside databases					
Availability to export the entire database to outside vendors via FTP or another method.					
System provides a field option to suppress records of any type from public view					
System administration module offers the ability to manage and modify record templates for all types of records.					
System administration module offers both group and granular levels of staff permissions					
Staff administration module offers the ability to create and duplicate individual and group logins (accounts)					
Staff administration module offers the ability to temporarily disable staff accounts as well as remove accounts.					
Staff administration module offers password management for scheduled changes.					
Ability to handle circulation/loan rules for a consortium having multiple libraries.					
Ability to set days closed and hours open					
Availability of a tool to reset a fixed field (or restart a date field) annually or as needed by record type					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Profiles for Record Loading					
Availability of load table to bring in batch records					
Availability of multiple load tables					
Ability to customize load profile tables					
Remote Authentication for E-Resources					
Availability of a remote patron authentication module					
Ability to expose minimal data for patron authentication					
Ability to control and restrict patron authentication for holds, payments and account management					
Availability of usage statistics for remote authentication.					
Usage statistics for remote authentication supports a consortium					
Availability of a patron API to facilitate remote access of e-resources.					
Availability of a RESTful API or other programming to automatically create, modify or delete database records.					

III. Public Catalog (included base product)

1. Please describe your basic public catalog product.

2. Please list the catalog features that are only available to users upon account login. Feel free to specify if there are any unique (non-basic) features that do not require account login.

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Interface and Search Capabilities					
Offers a clean basic search interface					
Offers keyword, phrase and Boolean searches					
Offers an advanced search option					
Performs well with any/all web browsers					
Offers real-time catalog results and patron information					
Is mobile responsive by design to accommodate searching via many types of devices					
Supports enlarged fonts and WC3 design standards					
Supports multiple world languages					
Ability to search and limit results to one member library					
Ability to limit a search using facets to restrict to one library, one format, etc.					
Supports cross-references and see-also headings					
Supports bib and item level holds					
Ability to sort catalog results					
Features material type icons for ease of format identification					
Failed search attempts should give a "Did you mean?" alternative or close results rather than no results					
Ability to provide keyword or author search results connecting to the 'Name See From' 400 field in an Authority Record					
Highlights words when results are returned to help explain why results came back					
Offers persistent links to individual titles					
Ability to create persistent links to featured lists					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Patron Account Functionality					
Ability for patrons to edit some of their contact information such as email					
Ability for patrons to access personal checkout/hold data					
Provides patron self service functions (place holds, renew materials, cancel holds, view notes from staff, update contact information)					
Availability of a reading history					
Offers lists or favorites which a patron could curate					
Offers method for patrons to track preferences and interests					
Features and Integration					
Staff interface links back to public view of a given record in the discovery catalog					
Ability to choose FRBR-ized display or non FRBR-ized display					
Provides information on similar titles or other titles in a series (integrates with Novelist Select)					
OverDrive API integration					
Ability to easily integrate carousels into web pages					
Ability for patrons to text or email a title and share on social media platforms					
Ability for users to save searches and search results					
Miscellaneous					
Ability to view a full record as a MARC record					
Availability of an online payment option (e-commerce)					
Availability of an online library card registration form					
Ability for libraries or the system admin to customize the discovery catalog's display					

IV. Discovery Catalog (add-on product)

1. Please describe your discovery catalog product.

2. Please list the discovery features that are only available to users upon account login. Feel free to specify if there are any unique (non-basic) features that do not require account login.

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Interface and Search Capabilities					
Offers a clean basic search interface					
Offers keyword, phrase, and Boolean searches					
Offers an advanced search option					
Performs well with any/all web browsers					
Offers real-time catalog results and patron information					
Is mobile responsive by design to accommodate searching via many types of devices					
Supports enlarged fonts and WC3 design standards					
Supports multiple world languages					
Ability to search and limit results to one member library					
Ability to limit a search using facets to restrict to one library, one format, etc.					
Supports cross-references and see-also headings					
Supports bib and item level holds					
Ability to sort catalog results					
Features material type icons for ease of format identification					
Failed search attempts should give a "Did you mean?" alternative or close results rather than no results					
Ability to provide keyword or author search results connecting to the 'Name See From' 400 field in an Authority Record in the staff interface					
Highlights words when results are returned to help explain why results came back					
Offers persistent links to individual titles					
Ability to create persistent links to featured lists					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Patron Account Functionality					
Ability for patrons to edit some of their contact information such as email					
Ability for patrons to access personal checkout/hold data					
Provides patron self service functions (place holds, renew materials, cancel holds, view notes from staff, update contact information)					
Availability of a reading history					
Offers lists or favorites which a patron could curate					
Offers method for patrons to track preferences and interests					
Features and Integration					
Staff interface links back to public view of a given record in the discovery catalog					
Ability to choose FRBR-ized display or non FRBR-ized display					
Provides information on similar titles or other titles in a series (integrates with Novelist Select)					
OverDrive API integration					
Ability to easily integrate carousels into web pages					
Ability for patrons to text or email a title and share on social media platforms					
Ability for users to save searches and search results					
Miscellaneous					
Ability to view a full record as a MARC record					
Availability of an online payment option (e-commerce)					
Availability of an online library card registration form					
Ability for libraries or the system admin to customize the discovery catalog's display					

V. Integration with Other Companies

Below is a list of the companies V-Cat and/or individual libraries currently work with in concert with the Sierra library system. Please use the checklist below to indicate which of these companies your ILS product integrates with at present.

1. Please briefly describe how your ILS product is equipped to handle AMH Sorters and RFID tags.

2. Please list if there are any limitations tied to outputting the database to an outside vendor. For example, can this only be done for bibliographic records or in a specific format?

Company / Equipment	Yes – We have worked with this company and can integrate with their products	No – We have not yet worked with this company or integrated the product	We can work with this company and integrate a product at no additional cost	We can work with this company and integrate a product with an add-on cost
Bibliotheca 3M (self-check, AHM, security gate, RFID provider)				
Logitech (self-check, AHM, security gate, RFID provider)				
Envisionware (self-check, AHM, security gate, RFID provider, PC management, laptop kiosk)				
Pharos (PC time management, printing kiosk)				
Cassie (PC time management, printing kiosk)				
Princh (printing kiosk)				
Auto Graphics (software used for statewide catalog integration)				
Aspen Discovery				
Baker & Taylor Content Café Cover Images and Content				
Syndetics Cover Images and Content				
Ebsco Novelist Select or Novelist Plus for enhanced catalog content				
OverDrive API				
Baker & Taylor EDI/FTP Ordering and Invoicing				
Midwest Tape (electronic ordering and invoicing)				
Backstage				
Payflow (e-commerce)				
PayPal (e-commerce)				
Shoutbomb (text/SMS/phone notifications)				
Unique Management Services (collection agency reporting)				

VI. Implementation Timeline and Known Constraints

3. Please list the components that make up a typical migration and implementation timeline as it applies to a consortium.

4. Are there any upcoming staffing / work constraints, or known issues with the company or software that our site should be aware of?

VII. Costs

1. Please supply a breakdown of costs by service and list the options for multi-year contracts or subscriptions.

2. Describe the invoicing process for new products and when maintenance of those products begins.

3. V-Cat may choose to bill back member libraries for maintenance on ILS products that they have purchased separately. Does your company's accounting process provide for the itemization of maintenance for products that are purchased by individual libraries within our consortium?

4. Explain how maintenance increases are applied and what typical annual increase we can expect with or without multi-year contracts.

VIII. Collaboration

In addition to conducting its own ILS Evaluation and Review, Wisconsin Valley Library Service is considering the benefits of partnering with Northern Waters Library System to bring V-Cat and the Northern Waters Library Network together in a single Integrated Library System implementation.

Appendix B includes information about Norther Waters Library Network (NWLN), including a list of member libraries along with their service population and a summary of their annual circulations for 2019 and 2021.

Merging Multiple Systems

Please list the components that make up a typical merging of migration from multiple consortia systems to one and implementation timeline as it applies to merging multiple consortia systems into one consortium.

Resource Sharing

Please list the possible configurations for resource sharing among a large consortium made up of different zones. What options exist for managing, enabling, or restricting resource sharing at the regional, library and location level?

Integration with Other Companies

Below is a list of the companies NWLS and/or individual libraries in NWLS currently work with in concert with the Sierra library system, in addition to those listed in the WVLS/V-Cat section above. Please use the checklist below to indicate which of these companies your ILS product integrates with at present.

Company or Equipment	Yes – We have worked with this company and can integrate with their products	No – We have not yet worked with this company or integrated the product	We can work with this company and integrate a product at no additional cost	We can work with this company and integrate a product with an add-on cost
Pika Discovery Layer				
Ingram				
MARCIVE				
Midwest Tape (Hoopla)				
Kanopy				

Collaboration Costs

1. Please supply a breakdown of costs for a single Integrated Library System implementation for both V-Cat and NWLN by service and list the options for multi-year contracts or subscriptions.

2. Are there additional costs associated with merging two Integrated Library System implementations into one?

3. Would there be any difference in the invoicing process for new products and when maintenance of those products begins for a single Integrated Library System implementation made up of both V-Cat and NWLN libraries.

4. It may be necessary to bill back member libraries, or groups of member libraries, for maintenance on ILS products that they have purchased separately. Does your company's accounting process provide for the itemization of maintenance for products that are purchased by individual libraries or groups of libraries within a consortium?

5. Explain how maintenance increases are applied and what typical annual increase we can expect with a single Integrated Library System implementation made up of both V-Cat and NWLN libraries with or without multi-year contracts.

Appendix A – V-Cat Member Libraries & Statistics

V-Cat consists of 25 public member libraries, with 35 locations. Two member libraries have branch locations.

Total Number of Bibliographic Records: 543,503 as of 5/6/2022.

Circulation and Number of Patrons - Circulation of items at each location regardless of ownership.

Library / Branch Location	2019 Circulation	2021 Circulation	Number of Patrons as of 01/01/2022
Abbotsford	29,786	18,400	2416
APL Antigo	106,704	71,259	8811
APL Elcho	2,525	1,524	
APL White Lake	1,386	1,201	
Colby	78,805	67,837	2097
Crandon	24,758	18,391	2585
Dorchester	10,897	9,468	440
Gilman	18,081	16,643	1022
Granton	11,960	12,821	609
Greenwood	22,537	18,453	1324
Laona	8,245	5,392	1102
Loyal	15,579	11,171	1046
MCPL Athens	19,979	11,811	
MCPL Edgar	23,785	16,219	
MCPL Hatley	31,179	17,599	
MCPL Marathon	40,319	25,615	
MCPL Mosinee	42,337	25,469	
MCPL Rothschild	123,363	79,134	
MCPL Spencer	22,381	9,425	
MCPL Stratford	24,055	18,659	
MCPL Wausau	457,206	263,079	77090
Medford	152,572	106,757	4890
Merrill	155,277	100,307	9681
Minocqua	142,383	117,961	8009
Neillsville	35,840	25,725	2552
Owen	17,489	12,162	978
Rhinelander	156,987	97,689	10165
Rib Lake	21,612	14,290	1763
Stetsonville	15,460	11,877	517
Thorp	33,728	25,997	3046
Three Lakes	33,203	22,635	2278
Tomahawk	68,283	45,442	4036
Wabeno	5,069	4,235	175
Westboro	7,231	5,526	224
Withee	9,626	6,476	509
TOTAL	**1,970,627**	**1,316,649**	**147,365**

Appendix B – NWLN Information, Members & Statistics

About Northern Waters Library Network

Northern Waters Library Network (NWLN) is a network of libraries sharing an integrated library system (ILS) to process, circulate and display library resources for the public in an expanded interactive union catalog. NWLN was established for the purpose of facilitating resource sharing and increasing the efficiency and effectiveness of library services in northern Wisconsin. NWLN is a service program of Northern Waters Library Service (NWLS) for libraries in Ashland, Bayfield, Burnett, Douglas, Iron, Sayner, Vilas and Washburn counties. The NWLN consists of 27 public libraries, 2 branch libraries and one school library. There are 80 staff user licenses. Combined, the membership typically has a yearly circulation of 990,000 and approximately 74,000 registered borrowers. The current catalog contains approximately 342,000 titles and 718,000 holdings.

NWLN provides delivery service between network libraries and administers a wide area network and offers PC, self-checkout and help desk support.

NWLS staff manages the shared library automation system, using Sierra from Innovative as well as the Pika discovery layer Along with the materials of member libraries found in NWLN, the system brokers purchase of shared electronic subscriptions such as Gale Courses and represents its members in the Wisconsin Public Library Consortium (WPLC) which coordinates OverDrive access to digital materials.

NWLN also provides all members with the following:
- Online forms for public requests for new materials
- Remote authentication services for reference databases that member libraries offer to the public
- Online library card registration
- System-wide email through Outlook 365
- Coordination of the use of third-party products working with the ILS, including text and phone notifications

NWLS had been on the Millenium software system from Innovative since 1999 and moved to Innovative's Sierra in 2013. The NWLN implementation of Sierra is "software only," self-hosted in a private virtualization platform maintained by a partnership of several Wisconsin public library systems. The virtualization platform is or will be made capable of supporting all reasonable hardware requirements necessary to support at least three production implementations of ILS product sets, one for each of the respective consortia supported by partner library systems.

Within the NWLN database, bibliographic records are shared among members with local holdings represented via attached records. There is centralized cataloging performed by contracted member staff on behalf of all libraries with full MARC records being transferred into Sierra ILS from SkyRiver and via z39.50 protocol. Maintaining the integrity of this database structure including how the results display to the public is of utmost importance to NWLN.

Northern Waters Library Network Member Libraries and Statistics

Total Number of Bibliographic Records:

Library	Annual Circulation - 2019	Annual Circulation - 2021	Number of Patrons
Vaughn Public Library	91,574	72,953	6,106
Bayfield Carnegie Library	30,456	19,923	1,764
Boulder Junction Public Library	19,212	12,621	1629
Forest Lodge Library	14,534	9,277	1,169
Drummond Public Library	5,150	5,047	652
Walter E. Olson Memorial Library	78,519	36,987	6,238
Grantsburg Public Library	30,948	22,234	2,293
Sherman & Ruth Weiss Community Library	94,113	47,616	7,472
Hurley Public Library	12,603	10,693	928
Evelyn Goldberg Briggs Memorial Library	37,180	27,283	1,959
LCO College Community Library	7,862	1,919	1,063
Lac du Flambeau Public Library	492	418	300
Lake Nebagamon	2,299	923	(all Superior PL)
Land O'Lakes Public Library	23,348	13,611	1,782
Legion Memorial Library	17,126	6,784	864
Madeline Island Public Library	6,108	4,572	903
Mercer Public Library	17,820	10,883	2,296
Koller Memorial Library	15,744	14,688	1,276
Northern Waters (Mail-a-book)	3,884	2,848	862
Eleanor Ellis Public Library	13,160	5,905	253
Presque Isle Community Library	11,090	7,702	698
Phelps School	1,503	1,342	253
Plum Lake Public Library	19,368	15,053	1,504
Shell Lake Public Library	32,547	20,723	2,217
Solon Springs	10,740	7,256	(all Superior PL)
Spooner Memorial Library	93,012	61,668	5,888
Superior Public Library	210,314	126,042	16,350
Washburn Public Library	36,834	19,964	2,122
Larsen Family Library	39,737	22,526	2,834
Winter Public Library	12,044	8,398	866
Winchester Public Library	1,536	1,718	251
Total	**990,857**	**619,577**	**73,481**