

December 2007

RMG SWRS RFI

REQUEST FOR INFORMATION

on

STATEWIDE RESOURCE SHARING (SWRS)

for the

LIBRARIES OF OHIO

on behalf of

STATE LIBRARY OF OHIO

<i>Date of Issuance:</i>	<i>7 December 2007</i>
<i>Date for Email Inquiries to RMG:</i>	<i>20 December 2007</i>
<i>Response Due Date:</i>	<i>4 January 2008</i>
<i>To the State Library of Ohio and the Chicago office of RMG Consultants, Inc.</i>	
<i>Invited Presentations at the State Library</i>	<i>17 – 18 January 2008</i>

© Copyright 2007

RMG Consultants, Inc.

RMG/CAVAL

4 Park Drive

Bundoora, Victoria, AUS 3083

Voice: 03 9 459 2722

Fax: 039 459 2733

geoffp@caval.edu.au

RMG Consultants, Inc.

333 W. North Avenue, #396

Chicago, IL 60610

Voice: 312-321-0432

Fax: 312-321-9594

rmg@rmgconsultants.com

www.rmgconsultants.com

**REQUEST FOR INFORMATION TO BE RECEIVED BY 4 JANUARY 2008
ON STATEWIDE RESOURCE SHARING (SWRS)
BY
THE STATE LIBRARY OF OHIO AND RMG CONSULTANTS, INC.**

Background

In November 2000 the State Library of Ohio contracted with Fretwell-Downing, Inc. (FDI) to provide software licenses, consulting services, installation, technical implementation and training for the technology portion of the Statewide Resource Sharing System that has now become known as Ohio Libraries Share MORE (OLS: MORE).

As OLS: MORE approaches its eighth year, it is time to develop a strategic plan for the next phases of Statewide Resource Sharing System (SWRS). The State Library believes that it is prudent to look again at the marketplace and current solutions for library resource sharing, and gather further inputs from the entire Ohio library community as part of this process.

Accordingly, the State Library has retained RMG Consultants, Inc. (RMG) to assist with a strategic planning process for the next phases of the Statewide Resource Sharing (SWRS) System, to:

- Review and assess current statewide resource sharing efforts in Ohio and identify needs and concerns related to statewide resource sharing activities.
- Conduct and facilitate three regional meetings in which invited individuals can comment on resource sharing needs and provide input on and reaction to identified issues and possible service models.
- Develop a Report on Needs Assessment of Statewide Resource Sharing for the State Library of Ohio upon completion of the regional meetings.
- Issue a Request for Information (RFI) to vendors of resource sharing solutions of interest, in coordination with the State Library of Ohio, and analyze vendors' responses.

This document is RMG's SWRS RFI that RMG has issued to vendors of interest.

On or before 4 January 2008 please return:

- One electronic copy and 3 printed copies to the State Library of Ohio:

Jo Budler, State Librarian
State Library of Ohio
274 East First Ave, Suite 100, Columbus, OH 43201
Phone: 614-644-6843
JBUDLER@sloma.state.oh.us

- One electronic copy and 1 printed copy to RMG in Chicago:

Rob McGee
RMG Consultants, Inc.
Suite 3507
1560 Sandburg Terrace
Chicago, Illinois 60610
U.S.A.
Telephone: +1-312-321-0432
rmg@rmgconsultants.com

All inquiries about this RFI must be submitted in email to RMG at:

rmg@rmgconsultants.com

Please note that vendors responding to this RFI may be invited for presentations and discussions of their responses with the State Library in Columbus. Sessions of 2 to 3 hours are planned for 17 – 18 January 2008.

1 SWRS BACKGROUND AND OVERVIEW

In 1997 the State Library of Ohio began to plan for effective full interactive sharing of resources by Ohio's school and public libraries.

The broad vision of this initiative was "Anyone, anywhere, at any time can borrow anything from any other Ohio library."

A Request for Proposal for a Statewide Resource Sharing System for Public and School Libraries was issued by the State Library on April 24, 2000, and four responses were received from:

Auto-Graphics, Inc.
epixtech, inc.
Fretwell-Downing, Inc.
VTLS, Inc.

In November 2000 the State Library contracted with Fretwell-Downing, Inc. (FDI) to provide software licenses, consulting services, installation, technical implementation and training for the technology portion of the Statewide Resource Sharing System that has now become known as Ohio Libraries Share MORE (OLS: MORE).

The goals of OLS: MORE have been:

- To allow library patrons to search their local library catalogs and then as needed to search the catalogs of the other OLS: MORE libraries and to request wanted items from them for delivery to their home libraries.
- To reduce the amount of library staff time required to participate in a statewide resource sharing system – to keep staff mediation at a minimum.
- To provide a patron-initiated search and request solution for library resource sharing.
- To achieve a 90% level of patron self-service searching and requesting for materials wanted from other libraries – i.e., a 90% level of unmediated (by library staff) library resource sharing.

As of July 31, 2007, there were 130 participants in OLS: MORE – including 49 schools and 81 public libraries. Combined, these libraries contain 19 million volumes and represent more than 3.3 million Ohio students and library patrons. Today OLS: MORE connects and interoperates with nine brands of automated library systems in Ohio libraries, using Z39.50, and in some cases SIP2: Horizon, Dynix, Follett, Innovative Interfaces, Polaris, Unicorn, Spectrum, Spydus, and Library.Solution.

In 2005 statistics for Ohio showed there were:

- 251 Public Libraries
- 138 Academic Libraries
- 4,089 School Libraries
- 450 Special Libraries,

and that the Public Libraries spent over \$101 million on materials.

In 2004 Ohio's public libraries held collections of over 48 million volumes, whose current replacement value has been estimated at more than \$3.6 billion. Ohio's academic libraries' have approximately 47 million volumes with an estimated replacement value of over \$5.8 billion.

In 2007 Library and Local Government Support Fund (LLGSF) for public libraries will total \$457,970,323.70, and

- Libraries Connect Ohio, a partnership of the State Library, OhioLINK, OPLIN, and INFOhio, will pay over \$4.2 million for electronic database subscriptions.
- The Metros and medium-sized libraries will pay over \$6.3 million for database subscriptions.¹

Ohio libraries have a lot of resources, and a rich history of sharing them – so much so that a plethora of resource sharing organizations has evolved, including CLEVNET, SEO, Discovery Place, CACL, CLC, SearchOhio, and OPLIN for public libraries; and OhioLINK and INFOhio for academic and school library communities.

The downside for aspirations to statewide library resource sharing is that the disparate integrated library systems (ILSs) used by these organizations function as resource sharing silos that work very well for libraries that share an ILS with its physical union bibliographic database, but pose significant challenges for a resource sharing solution that attempts to search many ILSs in aggregate and then provide seamless interoperability with them to perform interlibrary loan requests and fulfillment transactions. The challenge for a Next-Generation Statewide Resource Sharing System is to unite the disparate ILSs into an effective network of easily searchable databases with seamless, efficient, and effective requesting, fulfillment, and lending transactions.

Ohio Libraries Share: MORE (OLS: MORE) was created in 2000 to do just that – to bridge the technological divides among disparate local library and consortia systems in order to deliver the broad vision of bringing together the resources of public and school libraries for the residents of Ohio – “Anyone, anywhere, at any time can borrow anything from any other Ohio library.”

¹ Ohio's Metro Libraries are public libraries of: Cleveland, Toledo, Cuyahoga County, Dayton, Akron, Canton, Columbus, Youngstown, Cincinnati. Medium-sized libraries: Worthington, Cleveland-University Heights, Geauga County (Chardon), Mansfield, Rocky River, Warren-Trumbull, Batavia, Lorain, Centerville, Wayne County.

It is now time to develop a strategic plan for the next phases of the Statewide Resource Sharing (SWRS) System and to update the vision for it to include all types of libraries and library materials in Ohio.

An Updated Vision for Statewide Library Resource Sharing

“Every Ohio resident can access the print and electronic resources of all Ohio libraries, giving taxpayers the best possible return on investments in the full array of their libraries’ information resources.”

- To provide Ohio residents with the best possible access to the print and electronic resources of Ohio libraries, in order to give taxpayers the best possible return on their investments in the print and digital information resources of their Libraries.
- To provide Ohio residents with coherent access both to traditional print-form books and journals in library collections, as well as to digital information resources and information services accessible through the Internet/World Wide Web on computers in library facilities and from users’ computers in homes, schools, and offices.
- The State Library’s vision to provide Ohio residents ready access to the digital library world of the Internet/World Wide Web comes at a time when the fundamental role of free public libraries in our society is challenged by the emergence of electronic information resources that must be paid for at prices not affordable by all.

It is time to upgrade or replace the OLS: MORE’s underlying computer system, VDX, with a Next-Generation Library Resource Sharing solution that includes capabilities:

- For patron self-service search and discovery of Ohio library resources, regardless of format – print, print-on-demand, electronic, multimedia, AV – as well as commercially available resources that match interests.
 - Including federated and faceted searching capabilities.
- For unmediated patron self-service requests of wanted library materials.
- For unmediated patron self-service online purchases of commercially available items from suppliers like Amazon, Borders, Barnes and Noble.
- For delivery of library-supplied materials to locations requested by patrons, with payment options for home and office deliveries.
- For seamless connectivity and interoperability of the Next-Generation Library Resource Sharing System with Ohio libraries’ local Integrated Library Systems (ILSs).
 - For seamless integration of patrons’ SWRS requests for library materials with the circulation system modules of Ohio libraries’ local integrated library systems
 - Through NCIP or some other interface, so that SWRS requests can be handled in the same way – with the same efficiency and workflow (for picking and preparing materials for shipment, and processing them upon return) -- that libraries’ Integrated Library Systems handle locally-generated requests.
- For accommodating multiple arrangements and systems for pick-up and delivery of shipments among libraries.

Please note that the State Library has launched a videoconference series to keep the Ohio library community involved in planning the next phases of Statewide Resource Sharing, as addressed on its web sites.

<http://www.library.ohio.gov>

<http://www.library.ohio.gov/swrs/videoconferencing.html>

**Statewide Resource Sharing
videoconference series**

**home | ohio libraries collaborate | background | SWRS home | history |
focus groups | videoconferencing - December 19 Registration**

The State Library of Ohio hosted a statewide videoconference on November 14, 2007 with 100 representatives from all types of libraries in Ohio to plan the next phase in statewide resource sharing. Participants were located at seven sites across the state.

A Moderator was located at each site to lead discussion. Notes from each site discussion are available **at**

<http://www.library.ohio.gov/swrs/videoconferencing.html#nov14notes>. For more information about Ohio Library Collaboration and the Next Generation of Resource Sharing go to <http://www.library.ohio.gov/swrs/index.html>.

2 RFI ON YOUR COMPANY'S FULFILLMENT OF THE VISION FOR A NEXT-GENERATION SWRS SOLUTION

RMG requests that vendors receiving this RFI comment on the vision and goals for a Next-Generation Library Resource Sharing solution for SWRS presented by Table 2-1, and the capabilities described for it.

- (1) Would you please indicate whether your company is interested in and capable of providing a Next-Generation Library Resource Sharing Solution for SWRS as described by Table 2-1.
 - Please describe if and how your company would be able to provide a solution.
- (2) Would you please annotate your comments to each item in a copy of Table 2-1:
 - Your comments on the goals would be appreciated
 - Would you please indicate if and how you would be able to provide each of the described capabilities wanted for the Next-Generation SWRS Solution.
 - In describing how you could provide capabilities, would you please address if and how you would provide:
 - A physical union catalog
 - A virtual union catalog
 - Metasearching and faceted searching
 - Web-browser based interfaces for end-users and library staff that provide for search and retrieval of bibliographic and holdings data of the libraries, including retrieval of item-level information such as circulation status, shelf location, and availability for items associated with search results.
 - Capabilities for identification, authentication, and authorization of users for access to services and restricted resources, that would allow end-users to create persistent individualized or personalized versions of the user interface that can be accessed and modified by users.
 - An Interlibrary Loan Management System that would interoperate or interface with a union catalog system (physical, virtual, or both) and the many disparate ILSs among Ohio libraries, that would be ISO-compliant and also use customized interfaces as required to achieve interoperability.
 - E-commerce capabilities for users to make purchases online.

**TABLE 2-1
VISION FOR A NEXT-GENERATION
RESOURCE SHARING SOLUTION
FOR SWRS**

“Every Ohio resident can access the print and electronic resources of all Ohio libraries, giving taxpayers the best possible return on investments in the full array of their libraries’ information resources.”

GOALS for a Next-Generation Library Resource Sharing Solution for SWRS:

- To provide Ohio residents with the best possible access to the print and electronic resources of Ohio libraries, in order to give taxpayers the best possible return on their investments in the print and digital information resources of their Libraries.
- To provide Ohio residents with coherent access both to traditional print-form books and journals in library collections, as well as to digital information resources and information services accessible through the Internet/World Wide Web on computers in library facilities and from users’ computers in homes, schools, and offices.
- The State Library’s vision to provide Ohio residents ready access to the digital library world of the Internet/World Wide Web comes at a time when the fundamental role of free public libraries in our society is challenged by the emergence of electronic information resources that must be paid for at prices not affordable by all.

CAPABILITIES Wanted for a Next-Generation Library Resource Sharing Solution for SWRS:

- For patron self-service search and discovery of Ohio library resources, regardless of format – print, print-on-demand, electronic, multimedia, AV – as well as commercially available resources that match interests.
 - Including federated and faceted searching capabilities.
- For unmediated patron self-service requests of wanted library materials.
- For unmediated patron self-service online purchases of commercially available items – both print and electronic -- from suppliers like Amazon, Borders, Barnes and Noble.
- For delivery of library-supplied materials to locations requested by patrons, with payment options for home and office deliveries.
- For seamless connectivity and interoperability of the Next-Generation Library Resource Sharing System with Ohio libraries’ local Integrated Library Systems (ILSs).
 - For seamless integration of patrons’ SWRS requests for library materials with the circulation system modules of Ohio libraries’ local integrated library systems
 - Through NCIP or some other interface, so that SWRS requests can be handled in the same way – with the same efficiency and workflow (for picking and preparing materials for shipment, and processing them upon return) -- that libraries’ Integrated Library Systems handle locally-generated requests.
- For accommodating multiple arrangements and systems for pick-up and delivery of shipments among libraries.

3 RFI ON THE COSTS OF YOUR COMPANY'S PROVISION OF A NEXT-GENERATION SWRS SOLUTION FOR THE CURRENT OLS: MORE PARTICIPANTS

As of July 31, 2007, there were 130 participants in OLS: MORE – including 49 schools and 81 public libraries. Combined, these libraries contain 19 million volumes and represent more than 3.3 million Ohio students and library patrons. Today OLS: MORE connects and interoperates with nine brands of automated library systems in Ohio libraries, using Z39.50, and in some cases SIP2: Horizon, Dynix, Follett, Innovative Interfaces, Polaris, Unicorn, Spectrum, Spydus, and Library.Solution.

Table 3-1 shows the location and ILS system of these OLS: MORE libraries.

Sections 3.1 and 3.2 that follow request cost quotations for:

- A Next-Generation Library Resource Sharing Solution for SWRS that would be installed as a *physical system* at a host site to be determined by the State Library of Ohio.
- A Next-Generation Library Resource Sharing Solution for SWRS that you could provide as a *service* from a host site to be determined by you.

Please propose the numbers of staff and user licenses – or capacity for concurrent users -- that you believe, based on experiences with your proposed solution, are appropriate, else configure for:

- 200 concurrent staff users in 130 libraries
- 300 concurrent end-users in 130 libraries.

ALTERNATIVE SOLUTIONS

Respondents are encouraged to propose alternative solutions that may be different from the one envisioned in the preceding Section 2 of this RFI.

**TABLE 3-1
OHIO LIBRARIES SHARE: MORE MEMBERS & ILS**

LIBRARY	Integrated Library System (ILS) Vendor Name	ILS System Software Version
ALEXANDRIA PUBLIC LIBRARY	SirsiDynix	Horizon 7.4
ANSONIA LOCAL SCHOOLS	SirsiDynix	Unicorn
ARCANUM BUTLER LOCAL SCHOOLS	SirsiDynix	Unicorn
ARCHBOLD COMMUNITY LIBRARY	The Library Corporation	Library.Solution
ARCHBOLD LOCAL SCHOOLS	SirsiDynix	Unicorn
ASHLAND PUBLIC LIBRARY	SirsiDynix	2003.1.4.4
ASHTABULA CNTY DISTRICT LIBRARY	SirsiDynix	Horizon 7.3.4
BARBERTON PUBLIC LIBRARY	SirsiDynix	Classic
BEACHWOOD CITY SCHOOLS	SirsiDynix	Unicorn
BLOOM-CARROLL LOCAL SCHOOLS	SirsiDynix	Unicorn
BLUFFTON PUBLIC LIBRARY	SirsiDynix	GL3.1
DR. SAMUEL L. BOSSARD MEMORIAL LIBRARY	Polaris Library Systems	3.2
BRADFORD PUBLIC LIBRARY	SirsiDynix	Horizon 7.3.4
BRUMBACK LIBRARY	SirsiDynix	Horizon
CANTON COUNTRY DAY SCHOOL	SirsiDynix	Unicorn
CANTON LOCAL SCHOOL	SirsiDynix	Unicorn
CARNEGIE PUBLIC LIBRARY - East Liverpool	The Library Corporation	3.3.5
CHAMPAIGN COUNTY LIBRARY	The Library Corporation	3.3.5
CLARK COUNTY PUBLIC LIBRARY	Polaris Library Systems	3.2 Millennium Circulation
CLERMONT COUNTY PUBLIC LIBRARY	Innovative Interfaces, Inc	6.0
CLEVELAND PUBLIC LIBRARY	SirsiDynix	Unicorn 3.1
CLEVELAND HEIGHTS-UNIVERSITY HEIGHTS PL	SirsiDynix	Unicorn 3.1
COLUMBIANA PUBLIC LIBRARY	The Library Corporation	3.3.5
COMMUNITY LIBRARY - SUNBURY	The Library Corporation	Library.Solution 3.2
CONNEAUT PUBLIC LIBRARY	SirsiDynix	Unicorn
DAYTON METRO LIBRARY	SirsiDynix	Horizon 7.3.4
DELAWARE JVS	SirsiDynix	Unicorn
DELPHOS PUBLIC LIBRARY	SirsiDynix	Dynix 191
DELTA PUBLIC LIBRARY	Follett	6.0
EAST CLEVELAND PUBLIC LIBRARY	SirsiDynix	Unicorn 3.1
EAST PALESTINE MEMORIAL PUBLIC LIBRARY	Follett Sagebrush	InfoCentre 2.3
EDGERTON LOCAL SCHOOLS	SirsiDynix	Unicorn
EDGEWOOD SR HIGH SCHOOL (ASHTABULA)	SirsiDynix	Unicorn
EDISON LOCAL SCHOOLS	SirsiDynix	Unicorn
ELYRIA PUBLIC LIBRARY	SirsiDynix	Unicorn 3.1
EVERGREEN LOCAL SCHOOLS	SirsiDynix	Unicorn
FAIRFIELD COUNTY DISTRICT LIBRARY	SirsiDynix	Horizon 7.4
FAIRFIELD LOCAL SCHOOLS	SirsiDynix	Unicorn
FAIRLESS LOCAL SCHOOLS	SirsiDynix	Unicorn
FORT FRYE LOCAL SCHOOLS	SirsiDynix	Unicorn

LIBRARY	Integrated Library System (ILS) Vendor Name	ILS System Software Version
FRANKLIN-MONROE LOCAL SCHOOLS	SirsiDynix	Unicorn
REMONT CITY SCHOOLS	SirsiDynix	Unicorn
GALION CITY SCHOOLS	SirsiDynix	Unicorn
GEAUGA COUNTY PUBLIC LIBRARY	SirsiDynix	Dynix 191
GENEVA HIGH SCHOOLS	SirsiDynix	Unicorn
GENEVA PUBLIC LIBRARY	SirsiDynix	Horizon 7.3.4
GERMANTOWN PUBLIC LIBRARY	SirsiDynix	Horizon 7.3.4
GIRARD FREE LIBRARY	The Library Corporation	N/A
GRAND RIVER ACADEMY HIGH SCHOOL	SirsiDynix	Unicorn
GRAND VALLEY HIGH SCHOOL	SirsiDynix	Unicorn
GRAND VALLEY PUBLIC LIBRARY	SirsiDynix	Horizon 7.3.4
GRANDVIEW HEIGHTS PUBLIC LIBRARY	SirsiDynix	Horizon 7.4
GRANVILLE PUBLIC LIBRARY	SirsiDynix	Horizon
GREENVILLE CITY SCHOOLS	SirsiDynix	Unicorn
GREENVILLE PUBLIC LIBRARY	Polaris Library Systems	N/A
HARBOR-TOPKY MEMORIAL LIBRARY	SirsiDynix	Horizon 7.3.4
HENDERSON MEMORIAL LIBRARY ASSOC.	SirsiDynix	Horizon 7.3.4
HERRICK MEMORIAL PUBLIC LIBRARY	The Library Corporation	3.2
HUBBARD PUBLIC LIBRARY	The Library Corporation	3.3.5
HURON PUBLIC LIBRARY	SirsiDynix	Unicorn 3.1
HURT/BATTELLE MEMORIAL LIBRARY/ WEST JEFFERSON	Follett Sagebrush	Spectrum 5.0
INDIAN CREEK LOCAL SCHOOLS	SirsiDynix	Unicorn
INDIAN LAKE LOCAL SCHOOLS	SirsiDynix	Unicorn
JACKSON LOCAL SCHOOLS	SirsiDynix	Unicorn
JEFFERSON AREA JR/SR HIGH SCHOOL	SirsiDynix	Unicorn
KAUBISCH MEMORIAL PUBLIC LIBRARY	SirsiDynix	2003.1.4.5
KINGSVILLE PUBLIC LIBRARY	SirsiDynix	Horizon 7.3.4
KINSMAN FREE PUBLIC LIBRARY	The Library Corporation	3.3.5.7
LANE PUBLIC LIBRARY	SirsiDynix	Horizon 7.3.4
LEETONIA COMMUNITY PUBLIC LIBRARY	Follett	Circ/Cat Plus 6.3
LOGAN COUNTY DISTRICT LIBRARY	SirsiDynix	Unicorn
LOGAN-HOCKING COUNTY DISTRICT LIBRARY	Follett	N/A
MANSFIELD-RICHLAND COUNTY PUBLIC LIBRARY	SirsiDynix	version 191
MARLINGTON LOCAL SCHOOLS	SirsiDynix	Unicorn
MARYSVILLE PUBLIC LIBRARY	SirsiDynix	Horizon 7.4
MCCOMB PUBLIC LIBRARY	Polaris Library Systems	3.2
MCKINLEY MEMORIAL LIBRARY	The Library Corporation	Library.Solution v.3.3.5
MENTOR PUBLIC LIBRARY	SirsiDynix	Classic
MIAMI EAST LOCAL SCHOOLS	SirsiDynix	Unicorn
MEIGS COUNTY DISTRICT PUBLIC LIBRARY	The Library Corporation	3.3.5.4
MILLCREEK-WEST UNITY LOCAL SCHOOLS	SirsiDynix	Unicorn
MINERVA LOCAL SCHOOL	SirsiDynix	Unicorn
MISSISSINAWA VALLEY LOCAL SCHOOLS	SirsiDynix	Unicorn
MONROEVILLE LOCAL SCHOOLS	SirsiDynix	Unicorn

LIBRARY	Integrated Library System (ILS) Vendor Name	ILS System Software Version
MORLEY LIBRARY	The Library Corporation	Library.Solution
MUSKINGUM COUNTY LIBRARY SYSTEM	The Library Corporation	3.3.5
NELSONVILLE PUBLIC LIBRARY	LibLime	KOHA
NELSONVILLE YORK SCHOOLS	SirsiDynix	Unicorn
NEW LEXINGTON CITY SCHOOLS	SirsiDynix	Unicorn
NEW LONDON PUBLIC LIBRARY	Gaylord/Polaris	Galaxy
NEWARK CITY SCHOOLS	SirsiDynix	Unicorn
NEWARK PUBLIC LIBRARY	SirsiDynix	Horizon 7.4
NEWTON FALLS PUBLIC LIBRARY	The Library Corporation	Library.Solution
NORWALK PUBLIC LIBRARY	Polaris Library Systems	2.3
PAULDING COUNTY CARNEGIE LIBRARY	Polaris Library Systems	3.2
PERRY LOCAL SCHOOLS	SirsiDynix	Unicorn
PICKAWAY CNTY DISTRICT PUBLIC LIBRARY	SirsiDynix	Horizon 7.4
PICKERINGTON PUBLIC LIBRARY	SirsiDynix	Horizon 7.4
PLAIN LOCAL SCHOOLS	SirsiDynix	Unicorn
PLAIN CITY PUBLIC LIBRARY	SirsiDynix	Horizon 7.4
PREBLE COUNTY DISTRICT LIBRARY	SirsiDynix	Unicorn
PUTNAM COUNTY DISTRICT LIBRARY	SirsiDynix	N/A
RIVERDALE LOCAL SCHOOLS	SirsiDynix	Unicorn
ROCK CREEK PUBLIC LIBRARY	SirsiDynix	Horizon 7.3.4
ROCKY RIVER PUBLIC LIBRARY	SirsiDynix	GL3.1
SALEM PUBLIC LIBRARY	Polaris Library Systems	3.2.569
SALEM TOWNSHIP PUBLIC LIBRARY	Follett Sagebrush	InfoCentre 2.3
SANDY VALLEY SCHOOLS	SirsiDynix	Unicorn
SOUTHERN LOCAL SCHOOLS (CORNING)	SirsiDynix	Unicorn
STATE LIBRARY OF OHIO	Innovative Interfaces, Inc	
STOW-MUNROE PUBLIC LIBRARY	LibLime	KOHA
ST. THOMAS AQUINAS SCHOOL	SirsiDynix	Unicorn
STS. JOHN & PAUL HIGH SCHOOL (ASHTABULA)	SirsiDynix	Unicorn
SWANTON PUBLIC LIBRARY	Polaris Library Systems	3.2
TIFFIN-SENECA PUBLIC LIBRARY	Civica	Spydus
TROY-MIAMI COUNTY PUBLIC LIBRARY	SirsiDynix	Horizon 7.3.4
TUSLAW LOCAL SCHOOLS	SirsiDynix	Unicorn
UPPER ARLINGTON PUBLIC LIBRARY	VTLS	Virtua
VERSAILLES EXEMPTED VILLAGE SCHOOLS	SirsiDynix	Unicorn
WARREN LOCAL SCHOOLS	SirsiDynix	Unicorn
WASHINGTON COUNTY CAREER CENTER	SirsiDynix	Unicorn
WELLSTON CITY SCHOOLS	SirsiDynix	Unicorn
WICKLIFFE PUBLIC LIBRARY	SirsiDynix	Unicorn 3.1
WILMINGTON PUBLIC LIBRARY OF CLINTON COUNTY	SirsiDynix	Horizon 7.3
WORCH MEMORIAL PUBLIC LIBRARY	The Library Corporation	N/A
WORNSTAFF MEMORIAL PUBLIC LIBRARY	Follett Sagebrush	InfoCentre 2.3
WRIGHT MEMORIAL PUBLIC LIBRARY	SirsiDynix	Classic

3.1 RFI ON THE COSTS OF YOUR COMPANY'S PROVISION OF A PHYSICAL SYSTEM FOR THE NEXT-GENERATION SWRS

Please provide one-time and ongoing costs for the Next-Generation Library Resource Sharing Solution for SWRS that you could provide that would be installed as a **physical system** at a host site to be determined by the State Library of Ohio.

Please use the forms that follow or similar format to show summary one-time and ongoing costs; please use the forms that follow or similar format to show detailed itemized one-time and ongoing costs.

If you can provide a Next-Generation Library Resource Sharing solution for SWRS as a **service only**, please see Section 3.2 that follows for response.

COST SUMMARY FOR PHYSICAL SYSTEM FOR A NEXT-GENERATION SWRS SOLUTION

<u>Category</u> _____	<u>One-Time Cost</u>	<u>Annual Maintenance Charges</u>
(1) Central Site, including hardware, operating system software, and DBMS	_____	_____
(2) Applications software and utilities	_____	_____
(3) Other costs:	_____	_____
(4) TOTAL SYSTEM COST	_____	_____

For the system configured, please specify:

- (5) Number of users/user licenses
 - (5.1) Staff _____
 - (5.2) Public _____
- (6) Warranty periods (in months or years)
 - (6.1) Software _____
 - (6.2) Central site hardware _____

**PHYSICAL SYSTEM CENTRAL SITE HARDWARE
AND OPERATING SYSTEM, DATABASE MANAGEMENT SOFTWARE**

<u>Quantity</u>	<u>Product Number</u>	<u>Product Description</u>	<u>Purchase Price</u>	<u>Annual Maintenance Charge</u>
-----------------	---------------------------	----------------------------	-----------------------	--

PHYSICAL SYSTEM APPLICATIONS SOFTWARE

<u>Quantity</u>	<u>Product Number</u>	<u>Product Description</u>	<u>Purchase Price</u>	<u>Annual Maintenance Charge</u>
-----------------	---------------------------	----------------------------	-----------------------	--

PHYSICAL SYSTEM OTHER COSTS

<u>Item</u>	<u>Purchase Price</u>	<u>Annual Maintenance Charge (if any)</u>
-------------	-----------------------	---

3.2 RFI ON THE COSTS OF YOUR COMPANY'S PROVISION OF THE NEXT-GENERATION SWRS PROVIDED AS A SERVICE

Please provide one-time and ongoing costs for the Next-Generation Library Resource Sharing Solution for SWRS you could provide **as a service** from a host site to be determined by you. Please use the summary form on the next page to show summary costs; you may show detailed costs using any format that best shows detailed unit costs, ongoing costs, and total costs. Responses must show both detailed costs and summary costs.

Please provide pricing for this service for the following terms: three years; five years; ten years.

If longer-term agreements would result in lower costs, please specify the term or terms of such agreements and identify the lower costs and cost savings.

**COST SUMMARY FOR A NEXT-GENERATION SWRS SOLUTION
 PROVIDED AS A SERVICE**

<u>_____</u>	<u>One-Time Cost</u>	<u>Annual Cost</u>	<u>Category</u>
(1) Applications Software Services			
(1.1) System provision		_____	_____
(1.2) Customization/programming		_____	_____
(1.3) Profile development and setup		_____	_____
(1.4) Other (_____)		_____	_____
(1.5) SUBTOTAL		_____	_____
(2) Other costs:			
(2.1) Installation (including expenses)		_____	_____
(2.2) Training		_____	_____
(2.3) Training travel expenses		_____	_____
(2.4) Documentation		_____	_____
(2.5) Other (_____)		_____	_____
(2.6) SUBTOTAL		_____	_____
(3.1) TOTAL COST FOR 3 YEARS		_____	_____
(3.2) TOTAL COST FOR 5 YEARS		_____	_____
(3.3) TOTAL COST FOR 10 YEARS		_____	_____
<i>For the system configured, please specify:</i>			
(4) Number of Users/User Licenses			
(4.1) Staff		_____	
(4.2) Public		_____	

4 ANSWERS TO SPECIFIC QUESTIONS

The intent of this section is to obtain succinct answers to specific questions. Please number your answers with the corresponding numbers of the questions, and repeat each question with your answer.

RFI #1

How much staff (in numbers of Full Time Equivalents) would the State Library need for system implementation, system management, routine maintenance, troubleshooting, and operations for your system, product, or service? What level of experience is expected of the staff?

RFI #2

Please describe how a given user at a workstation is connected to the system, product, or service you have configured, and, for such connection, please describe whether or not a session is established, and how each query transaction is handled. If a session is established, please state the length of time or number of activities required to handle and complete processing of a query from a user. In this environment, what constitutes a “session” or a “connection,” and what, if any, is the difference?

RFI #3

Please describe how the Union Catalog and/or ILL Management System solutions you have configured could provide for patron authentication or identification for purposes of access to resources, privileges, or library services. Does the system you have configured support the NISO Circulation Interface protocol (NCIP), or is NCIP support planned? If planned, when will it be available? Please discuss.

RFI #4

If you have configured a virtual Union Catalog solution that utilizes the NISO Z39.50 protocol for search and retrieval, does the solution also conform or comply with the U. S. National Profile for NISO Z39.50 implementation? If “yes,” what will be required of libraries to make local databases profile compliant? If the bibliographic database search and retrieval capabilities of the virtual Union Catalog solution you have configured are based on protocols other than NISO Z39.50, please describe the protocols, methods, or procedures used to accomplish search and retrieval.

RFI #5

Please describe the metasearch and faceted search capabilities of the Union Catalog system, product, or service you have configured, and state which record formats and data types are searchable. Does the solution utilize third-party search engines, query tools, or similar products for search and retrieval functions? If yes, please identify the third party products and briefly describe their purpose and use.

RFI #6

Does the Union Catalog and/or ILL Management System you have configured transfer a bibliographic search from an unfilled loan request to OCLC automatically or seamlessly without manually conducting the search on OCLC? Can citation data be retained for later searching, as on OCLC? Please discuss.

RFI #7

Are patron records created and/or maintained by the ILL Management System solution you have configured? If yes, please describe the data elements and fields of patron records, how such records are created, and if and how such records can be indexed for search and retrieval.

RFI #8

If you have configured a physical Union Catalog solution, please describe and discuss the methods used for creation of the union database, for updating and maintaining the union database, and for querying local systems for item and patron data and information.

RFI #9

Please explain if and how your proposed Next-Generation Statewide Resource Sharing (SWRS) System would achieve seamless interoperability with the disparate integrated library systems (ILSs) used by Ohio libraries and consortia, in order to perform interlibrary loan requests and fulfillment transactions. Please explain how your proposed solution could unite the disparate ILSs into an effective network of easily searchable databases with seamless, efficient, and effective requesting, fulfillment, and lending transactions.

RFI #10

If invited, would a representative be available to meet with the State Library in Columbus for two to three hours on either 17 or 18 January 2008 for presentations and discussions?