



Administered by University of Maine
System Office of Strategic Procurement
Request for Information (RFI)

INTEGRATED LIBRARY SYSTEMS (ILS)
RFI #2022-060

Issued Date: March 9, 2022

Response Deadline Date/Time: March 30, 2022, 11:59 p.m. EST

Response Submission Information:

Submitted electronically to UMSResponses@maine.edu
Email Subject Line – RC: ILS – RFI # 2022-060

Response Contact Information:

Strategic Sourcing Manager (SSM): Robin Cyr
Email: UMSResponses@maine.edu and robin.cyr@maine.edu

Request for Information (IT) – ILS Dated: March 9, 2022

Contents

SECTION

1

.....3 **Appendix**

A – University of Maine System Response Cover Page.....	3	Appendix
B – Debarment, Performance and Non-Collusion Certification.....	4	SECTION
2	5	
Appendix C – Organization Reference Form.....	5	
Appendix D – Evaluation Question(s) - Organization, Qualifications and Experience		
.6 Appendix E – Evaluation Question(s)		
–Implementation.....	9	SECTION 3– RELATED
MATERIALS.....	12	

SECTION 1

Appendix A – University of Maine System Response Cover Page

SirsiDynix Note: We consider the information provided in this RFI response to be confidential

because it discusses future development plans. We requested that a Non-Disclosure Agreement be signed but have not yet received it. Please consider our response confidential.

RFI # 2022-060
ILS

Organization Name:	Sirsi Corporation dba SirsiDynix
Chief Executive – Name/Title:	Bill Davison / CEO
Telephone:	800-288-8020 ext. 5660
Fax:	
Email:	Bill.davison@sirsidynix.com
Headquarters Street Address:	3300 N. Ashton Boulevard, Suite 500
Headquarters City/State/Zip:	Lehi, UT 84043
Lead Point of Contact for Quote – Name/Title:	Stacy Betts / Senior Sales Director, New Account Development
Telephone:	800-288-8020 ext. 5477
Fax:	
Email:	Stacy.betts@sirsidynix.com
Street Address:	3300 N. Ashton Boulevard, Suite 500
City/State/Zip:	Lehi, UT 84043

1. No personnel currently employed by the University or any other University agency participated, either directly or indirectly, in any activities relating to the preparation of the Respondent's response. 2. No attempt has been made or will be made by the Respondent to induce any other person or firm to submit or not to submit a response.

To the best of my knowledge all information provided in the enclosed response, both programmatic and financial, is complete and accurate at the time of submission.

Apr-12-2022 | 11:49 PDT

Date: _____

Scott Worthington
General Counsel

Name and Title (Printed) Authorized Signature

Request for Information (IT) – ILS Dated: March 9, 2022 Appendix B – Debarment,

Performance and Non-Collusion Certification

University of Maine System
DEBARMENT, PERFORMANCE and NON-COLLUSION CERTIFICATION
RFI # 2022-060
ILS

By signing this document, I certify to the best of my knowledge and belief that the aforementioned organization, its principals and any subcontractors named in this proposal:

- a. Are not presently debarred, suspended, proposed for debarment, and declared ineligible or voluntarily excluded from bidding or working on contracts issued by any governmental agency.
- b. Have not within three years of submitting the proposal for this contract been convicted of or had a civil judgment rendered against them for:
 - i. Fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state or local government transaction or contract.
 - ii. Violating Federal or State antitrust statutes or committing embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
 - iii. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or Local) with commission of any of the offenses enumerated in paragraph (b) of this certification; and
 - iv. Have not within a three (3) year period preceding this proposal had one or more federal, state or local government transactions terminated for cause or default.
- c. Have not entered into a prior understanding, agreement, or connection with any corporation, firm, or person submitting a response for the same materials, supplies, equipment, or services and this proposal is in all respects fair and without collusion or fraud. The above mentioned entities understand and agree that collusive bidding is a violation of state and federal law and can result in fines, prison sentences, and civil damage awards.

Failure to provide this certification may result in the disqualification of the Respondent's proposal, at the University's discretion.

Apr-12-2022 | 11:49 PDT

Date: _____

Scott Worthington
General Counsel

Name and Title (Printed) Authorized Signature

Request for Information (IT) – ILS Dated: March 9, 2022

SECTION 2

Appendix C – Organization Reference Form

Respondent's Organization Name: Sirsi Corporation dba SirsiDynix

INSTRUCTIONS: Provide a minimum of three (3) current professional references who may be contacted for verification of the Respondent's professional qualifications to meet the requirements set forth herein. We strongly prefer references from higher education institutions and public libraries similar in size and requirements to those provided in Section 1.1.2.

We request that the references include one long-standing customer (minimum of 3 year engagement) and one new customer (one who has been engaged with Respondent for less than one year).

REFERENCE #1	
Institution/Company Name	Mississippi State University Library Partnership
Contact Name	Stephen Cunetto
Contact Title	Associate Dean
Contact Phone Number	662-325-8542
Contact eMail Address	scunetto@library.msstate.edu
Relationship Length	20 Years

REFERENCE #2	
Institution/Company Name	University of Alberta
Contact Name	Weiwei Shi
Contact Title	Associate University Librarian
Contact Phone Number	780-492-6456

Contact eMail Address	weiwei.shi@ualberta.ca
Relationship Length	20Years

REFERENCE #3	
Institution/Company Name	LOUIS: The Louisiana Library Network Consortium
Contact Name	Teri Galloway
Contact Title	Executive Director
Contact Phone Number	225-219-7156
Contact eMail Address	teri.galloway@regents.la.gov
Relationship Length	21 Years

REFERENCE #4	
Institution/Company Name	New Mexico State Library
Contact Name	Brad Carrington
Contact Title	Bureau Chief – Technical Services
Contact Phone Number	505-476-9730
Contact eMail Address	bradley.carrington@state.nm.us
Relationship Length	6 months

University of Maine System RFI Page 5 of 20 Rev. 07/01/2020

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Request for Information (IT) – ILS Dated: March 9, 2022 Appendix D – Evaluation Question(s) -

Organization, Qualifications and Experience

Respondent's Organization Name: Sirsi Corporation dba SirsiDynix

INSTRUCTIONS: Respondents shall ensure that all information required herein is submitted with the response. All information provided should be verifiable by documentation requested by the University. Failure to provide all information, inaccuracy or misstatement may be sufficient cause for rejection of the response or rescission of an award. Respondents are encouraged to provide any additional information describing operational abilities.

Evaluation Question(s)

1. Provide a statement describing your company to include name, number of employees, locations, number of years in business, number of years offering/supporting the proposed solution, and any and all acquisitions or mergers in the last five years. Is the company publicly or privately held?

SirsiDynix: The statement below provides the requested information.

History. Sirsi Corporation was founded in 1979 as a computer consulting business. The company developed a Unix-based library automation system for the Georgia Institute of Technology in 1981, and offered it as a turnkey system to other libraries beginning in 1983. Also in 1983, Dynix Corporation first partnered with libraries to spearhead the development of Integrated Library Systems (ILS) technology. Both companies evolved steadily over the next 40+ years, becoming dominant forces in the industry. Their strengths were combined when Sirsi Corporation and Dynix merged in 2005, forming SirsiDynix. SirsiDynix is a privately held company. It was acquired by Vista Equity Partners in December of 2006 and was then acquired by ICV Partners, a leading investment firm, in December of 2014.

Organization and Staffing. SirsiDynix maintains numerous offices in the United States and around the world, including our corporate headquarters in Lehi, Utah, and offices in 18 countries including Canada, Australia, throughout Europe, Asia, and Central and South America. This global reach provides you with a dedicated team that can support your needs 24/7. Our team of industry experts, many with library and MLS experience, includes over 330 full-time individuals devoted exclusively to our electronic library systems.

Training & Consulting 19
Data & Delivery Services 19
Project Management 14
Upgrades 6
Customer Support 61
Library Relations 12
R&D/Development 89
Cloud Services/SaaS 15
Marketing 8
Sales 51
HR 7
Admin/Legal 6
Accounting & Finance 22
IT 5

University of Maine System RFI Page 6 of 20 Rev. 07/01/2020

DocuSign Envelope ID: 95F586EE-4772-4187-A447-CD5B21B34CC6

Request for Information (IT) – ILS Dated: March 9, 2022

Experience. SirsiDynix is a global leader in library automation, management and user experience solutions. Our customer base includes over 4,700 library customers around the world serving more than 200 million people through more than 20,000 library outlets. With over 40 years of industry experience, we know how to deliver outstanding solutions and on-time implementations to academic, public, school and consortia libraries, helping you to deliver a great patron experience while increasing productivity and lowering costs.

SirsiDynix has completed more ILS conversions than any other major library software vendor. Our **implementation staff averages over 8.5 years of implementation experience**, and they will advise you every step of the way. We want you to feel comfortable with the implementation process, so we assign specialized resources to provide the timely support you need to make your implementation a success.

Our Operations staff **averages over 11 years** with SirsiDynix, and **42% have library backgrounds**.

Other statistics that demonstrate the experience SirsiDynix can offer the Library include:

- We have more than **10,000** knowledgebase articles and solutions
- SirsiDynix Customer Support emphasizes full resolution of an issue and complete customer satisfaction. Of cases submitted in 2021, **48.3% were resolved the same day**, and **98% of**

our customers were “Satisfied” or “Very Satisfied” with support (an overwhelming majority, 86% reporting they were “Very Satisfied”). We encourage customers to respond to satisfaction surveys and use the information they provide to continue improving the support we offer.

- In 2020, the SirsiDynix training team greatly exceeded the average satisfaction rating with an approval rating of 94% (the average for industries worldwide is 86%). **SirsiDynix taught over 700 instructor-led classes to more than 4,000 students, with more than 35,000 registrations taking place for Self-Paced courses.**

These impressive attendance numbers also reflect the 100+ free instructor-led and 100+ free self-paced courses we offered as part of our COVID support in 2020: more than 18,000 library staff participated in these free learning opportunities.

Services. SirsiDynix combines world-class products with superior services, going to great lengths to ensure smooth implementation and ongoing customer support for all our customers. We have a comprehensive online training program geared to support the success of your staff, both during implementation and well beyond—classes are available for the life of your contract, many of them free and repeatable.

Partnerships. SirsiDynix partners with dozens of companies and interfaces its products with dozens of third-party products. These strategic partnerships allow our customers to procure many of its technology products from a single source—SirsiDynix—providing a one-stop shop for library technology. These partnerships also enable testing and product integration among a very wide array of library systems, such as self-check systems, self service kiosks, PC Reservation, Print Management, federated searching, OpenURL resolvers, wireless networking, network management, ebooks and audiobooks.

2. If subcontractors are to be used, provide a list that specifies the name, address, phone number, contact person, and a brief description of the subcontractors’ organizational capacity and qualifications.

SirsiDynix: No subcontractors would be used.

3. Please provide information about contract cancellations or non-renewals your company has experienced over the last three years.

University of Maine System RFI Page 7 of 20 Rev. 07/01/2020

DocuSign Envelope ID: 95F586EE-4772-4187-A447-CD5B21B34CC6

Request for Information (IT) – ILS Dated: March 9, 2022

SirsiDynix: As is normal in the library software industry, we gained new customers over the last three years and also had customers leave. However, as a privately held company we do not disclose the information specifically requested.

Appendix E – Evaluation Question(s) –Implementation

Evaluation Question(s) – Implementation Questions

1. Describe your recommended implementation strategy, best practice consulting options, and professional services. The University of Maine System requires the review of consultant's credentials/experience and reserves the right to request replacement if he/she fails to meet

expectations at any time.

SirsiDynix: We are happy to provide the credentials/experience of staff involved with your implementation, as requested, and would also consider any request for a replacement of staff.

Upon contract signing the Library will be assigned a SirsiDynix Project Manager. The Project Manager will work with your system administrator to keep you informed and on schedule through each phase of the implementation.

SirsiDynix is made up of carefully chosen and highly qualified full-time employees who are dedicated to serving the needs of our customers. SirsiDynix staff includes experienced librarians, technical support, and research and development personnel. The SirsiDynix implementation/installation team will be composed of:

Project Manager: This is your primary point of contact during the Implementation. You will work with your project manager to plan, schedule, and interface with other departments.

Data Services: The Data Services team that will convert and transfer your library data into your new SirsiDynix Symphony system.

Consulting: The Consulting team works with you to set up your library policies and address issues of special importance or priority.

Product Delivery: This team works with you to make sure your hardware, networking, and operating systems are fully functional.

Training: The Training team designs and delivers your contracted training.

Data conversion is typically managed at our offices.

Training can be done via the Internet in a virtual environment including live instructor-led web conference training, pre-recorded training sessions, and on demand web based trainings which are available from our web site.

The Project Manager and any other required staff are available for conference calls for meetings and discussions with library staff and can be contacted via email at any point.

SirsiDynix system installations, from startup to your scheduled go-live date, are typically completed within three to four months of contract execution. Larger, more complex projects may take longer. The difference is primarily in the amount of time the Library will need to plan and prepare for the migration. Your implementation schedule is, of course, based on factors such as the conclusion of contract negotiations and completion of profiles (policies) and databases ready to be loaded to the new system.

The actual installation timetable is normally worked out by mutual agreement between the SirsiDynix Project Manager and the Library's system administrator once the Library places an order or notifies SirsiDynix that you wish to have an installation scheduled. SirsiDynix confirms a detailed schedule with specific dates for each necessary project activity typically within 10 days of contract execution.

2. Describe the steps your firm will take to understand the business model and functional needs of the client and ensure that during the configuration and implementation process the product will be applied for optimal performance and satisfaction.

SirsiDynix: SirsiDynix has completed more ILS conversions than any other major library software vendor. Our **implementation staff averages over 8.5 years of implementation experience**, and they will advise

University of Maine System RFI Page 9 of 20 Rev. 07/01/2020

DocuSign Envelope ID: 95F586EE-4772-4187-A447-CD5B21B34CC6

Request for Information (IT) – ILS Dated: March 9, 2022

you every step of the way. We want you to feel comfortable with the implementation process, so we assign specialized resources to provide the timely support you need to make your implementation a success.

In the beginning phases of each implementation project, SirsiDynix team members will hold meetings with the Library to confirm specifications and discuss the migration process.

During early conference calls, the general structure of the project is explained to the customer and broad timescales agreed upon. The project manager then works with the customer and our global scheduling team to apply dates to every individual task. The final agreed schedule is then sent to the customer.

Where changes to the plan are subsequently required, they are again coordinated by the project manager with the customer and scheduling team.

To further discuss the migration with the Library, the assigned SirsiDynix data consultant will work with the customer to define data conversion requirements, and the assigned SirsiDynix project consultant will work with the customer to understand the system's configuration options and define customer requirements. Our consultant will work closely with you during several policy configuration sessions. All policy creation, mapping, policy verification, and problem resolution is done using an online Implementation portal.

After we have loaded your policies you will have a chance to review and test both your migrated data and your policies.

3. It is expected that the Respondent will assign a Project Manager who will have responsibility for its implementation team, and who will partner with the our Project Manager.

SirsiDynix: Yes, one of the first steps that happens after a contract has been signed is that SirsiDynix will assign a Project Manager to your implementation project.

Your SirsiDynix Project Manager will partner with your Project Manager, and performs the following:

- Organizes internal meeting with appropriate SirsiDynix staff to kick off your implementation project
- Sends the project launch literature and related materials to you and arranges an initial call to gather basic information and plan your schedule
- Compiles your project team
- Acts as your primary SirsiDynix contact during the implementation
- Guides you through the data mapping process
 - Ensures proper resources are available to meet critical milestones of your schedule
- Reports to you weekly via phone with status reports to keep everyone apprised of project progress
- Brings necessary SirsiDynix staff into the project at appropriate times
- Performs quality control checks at critical intervals in your project
- Assists you with the transition from the implementation phase to Client Care

4. Indicate your timeline from implementation start to “go live” date. Provide task lists and timelines for a standard implementation. A sample project plan would be helpful.

SirsiDynix: A sample SirsiDynix Symphony Implementation Schedule included below illustrates the various tasks necessary to complete a migration to Symphony and the time recommended for each. Note that this is a sample schedule and may include software or modules you do not wish to use.



SECTION 3- RELATED MATERIALS

1.1.3 Purpose

This Request for Information is issued by the University of Maine System.

The purpose is to acquire specific information about product development initiatives on Integrated Library Systems(ILS). The ILS vendorlandscape is highly consolidated, and significant product knowledge has been collected by the participant libraries in this RFI. As such, we request information that offers examples of ILS product development beyond standard marketing and sales information relating to the existing ILS product offering.

Specifically, the purpose of this RFI is to understand new benefits and advancements, particularly related to the end-user experience, in ILS systems that are: in place currently, in a current Beta phase of development, or have been approved for development in the next 6-18 months. Because we are asking for potentially sensitive corporate information as it relates to proprietary product development, we will consent to a mutually agreeable Non-Disclosure Agreement if required.

All aspects of this request for information should be geared toward developments relating to integrated library systems that could effectively support multi-campus consortia library services and support major public libraries in the state. We invite responses for either full systems or components of systems, such as a discovery layer.

This document provides instructions for submitting responses, the procedure and criteria by which the Respondent(s) will be selected, and the contractual terms which will govern the relationship between the University and the awarded Respondent(s).

Respondents should review **1.1.4 Key Objectives** of this document to see the full Scope of Services/Products we are seeking.

SirsiDynix: We understand, and can appreciate, why the University of Maine System is looking for information beyond the standard functionality available with most modern ILS solutions. We have provided information on what SirsiDynix can offer now, as well as within the next 6-18 months, in our responses to your Key Objectives below.

1.1.4 Key Objectives

- Developments of ILS solutions that will function well for the University of Maine System academic libraries and for the State Library and major public libraries. This could be done by
 - A consortium of all libraries (public and academic) under one ILS
 - Two consortia, one for public and one for academic libraries under two systems

SirsiDynix: Our solution would work for the University of Maine System as either a single consortium or as two consortia. Some details on consortia strengths that we can provide, that you may not be aware of, are detailed below.

SirsiDynix helps library consortia worldwide maintain the delicate balance between union and separation. Our library consortia clients range from local community colleges and public libraries sharing their resources to large statewide networks that include academic, public, special, and school libraries. In fact, SirsiDynix supports more library consortia than any other ILS vendor. All SirsiDynix shared systems and products are built so you can work well together, separately.



With SirsiDynix software, you get:

- Flexibility to select the member libraries you'll share resources with.
 - Flexibility to own, manage, and control your library's records and enforce its policies.
- Flexibility to extend access to even more information with a portal that shows your library's face.
- Flexibility to share physical and digital resources.
- Flexibility to support MARC21, UNIMARC, Dublin Core, and other metadata formats in the same database.
- Flexibility to allow your users to search and place holds with other member libraries—and to allow users of other member libraries to search and place holds on your library's resources.
- Flexible transaction reporting per library or group.

SirsiDynix has long focused on the special needs of consortia and developed the industry's most comprehensive technology for these organizations. From central library management systems that support all technical and public services, to today's leading business intelligence technologies for libraries, to the latest user interface solutions, and everything in between—they are all part of SirsiDynix's end-to-end suite of products supporting the unique and complex needs of today's consortia.

Multiple Environments for Consortia

Symphony fully supports virtualization using VMware ESX 4.0 and ESXi 4.0. If your consortium decides to host its own software and provide multiple “instances” of Symphony for its members, virtualization will save you money and resources.

However, the most cost-effective model is typically one in which all participants share a single Symphony application with multiple, “virtual” environments based on policy configuration and record ownership parameters. This is also the configuration that allows for the most pain-free resource sharing.

Symphony's flexible n-tier architecture supports many additional resource-sharing models, including the following models that have been successfully deployed for large, multi-type consortia customers:

- Separate databases, separate Symphony applications
- Shared database, separate Symphony applications

University of Maine System RFI Page 13 of 20 Rev. 07/01/2020

DocuSign Envelope ID: 95F586EE-4772-4187-A447-CD5B21B34CC6

Request for Information (IT) – ILS Dated: March 9, 2022

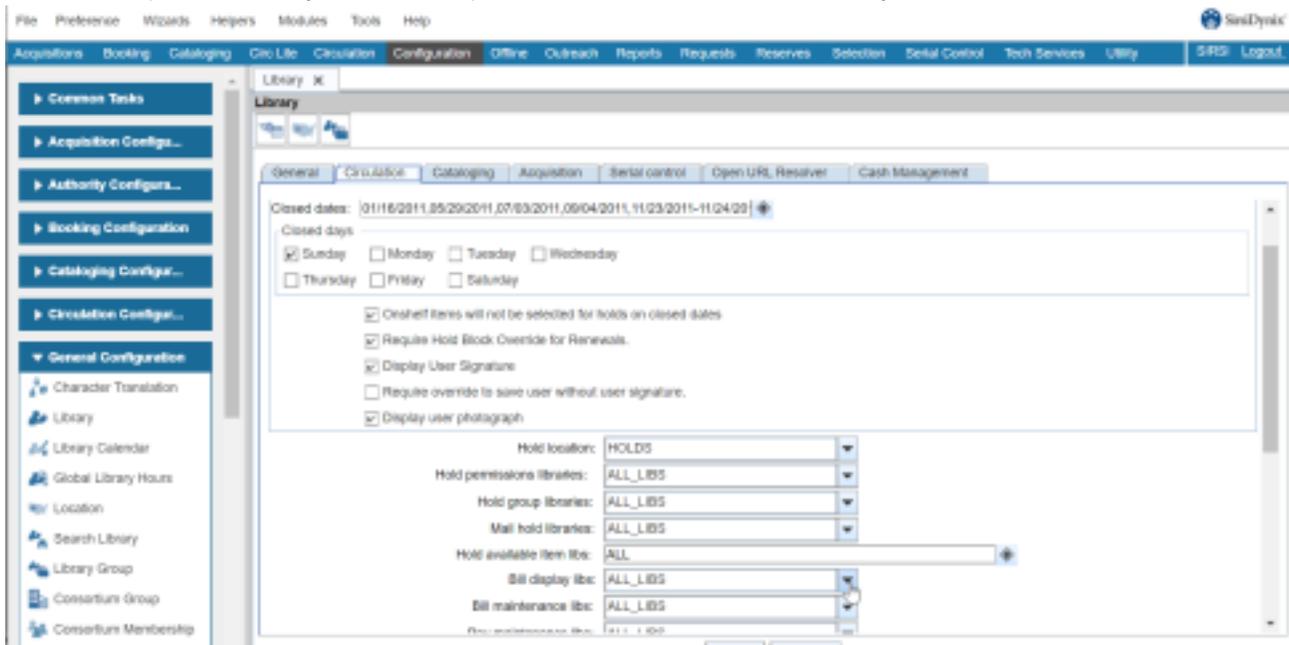
- Shared database, shared Symphony application with separate Enterprise discovery applications (and even separate servers hosted throughout the country)

Managing Consortia with Symphony

With Symphony, consortia can set record ownership parameters for all types of data:

- circulation (holds, mail delivery, bills, circulation, users, credits)
- cataloging (items, call numbers, MARC holdings data)
- acquisitions (funds, vendors, orders)
- serials (checkin, control records)

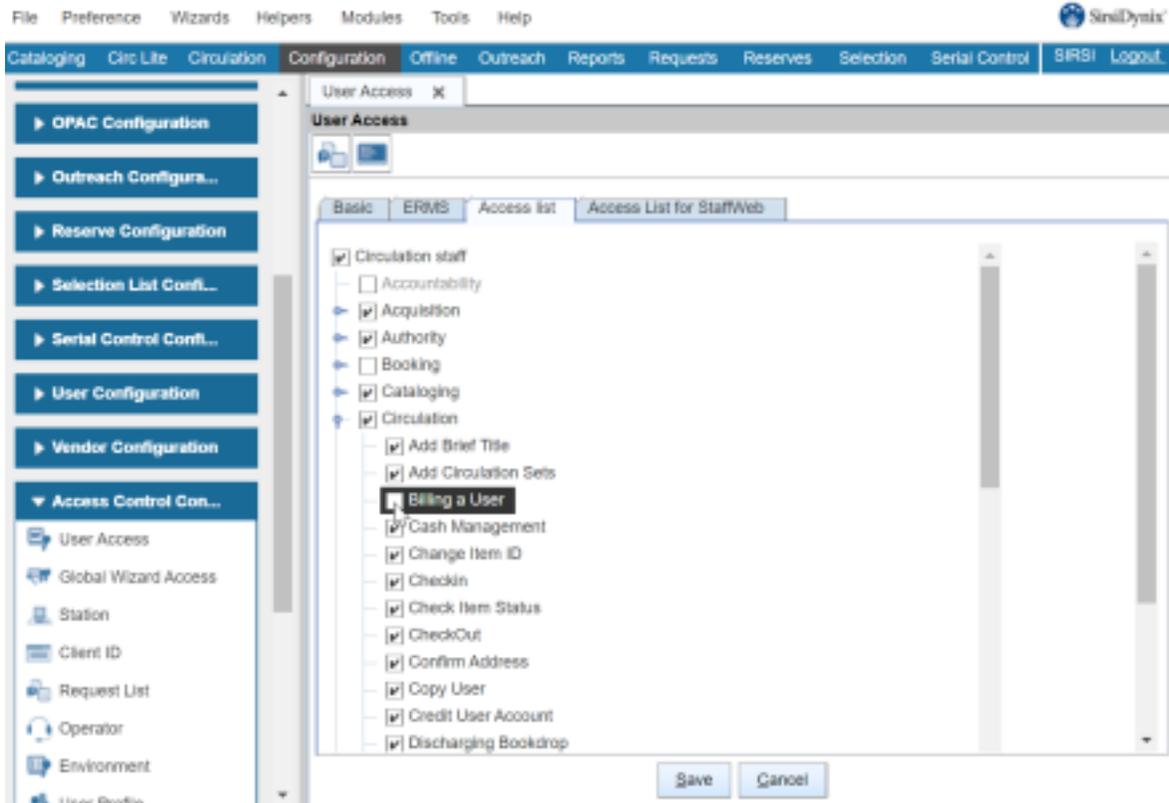
Record ownership, called Display and Maintenance policies in Symphony, lets each library in the consortium determine which other libraries will have rights to display (read-only display and copy) or maintain (create, modify, and remove) records associated with that library.



Flexible display and maintenance permissions are easy to configure for each library.

Furthermore, there is no practical limit to the number of policy settings libraries can create in Symphony, such as user profiles, item types, location codes, circulation rules, and Enterprise gateways and profiles for a unique user experience.

Request for Information (IT) – ILS Dated: March 9, 2022



User access profiles allow you to define, at a very granular level, the tools individual staff members *at each library* can access

Discovery

For the three libraries interested in discovery layer options, our SirsiDynix Enterprise discovery tool also fully supports consortia. With Enterprise, libraries in a consortium can have:

- Local branding:
 - Powerful search scoping
 - Flexible authentication with multiple resources
 - Library- and user-specific profiles
 - Sortable holdings display
-
- Developments of ILS solutions that are responsive to customer needs and requirements, both at the local library and the consortium levels

SirsiDynix: We make it a high priority to ensure our solutions are responsive to the needs and requirements of customers of all types and sizes. We understand that our customers' success has a direct correlation to our success.

SirsiDynix conducts formal annual roadmap planning along with semi-annual roadmap review so that adjustments can be made in response to rapidly emerging technologies, standards, customer

University of Maine System RFI Page 15 of 20 Rev. 07/01/2020

DocuSign Envelope ID: 95F586EE-4772-4187-A447-CD5B21B34CC6

Request for Information (IT) – ILS Dated: March 9, 2022

enhancement requests and other needs identified in the library marketplace. The resulting roadmaps are then published on the SirsiDynix Client Care portal available to all customers.

SirsiDynix also has a Strategic Partnership Program that is designed to foster even greater interactions between the SirsiDynix Engineering organization and leading customers. Customers that participate as strategic partners will have direct input into the product design process and provide feedback throughout product implementation.

Some of the enhancements we have planned for various products are briefly addressed below.

Symphony and **SymphonyWeb** updates will include review and addition of selected customer-requested enhancements along with greater focus on architecture and features related to BLUEcloud.

SirsiDynix will complete a **unified harvest** function designed to move all SirsiDynix harvest processes into a single component. Architecture and features planned:

- Multi-tenant architecture to improve speed of development and deployment of new features
- Additional data sets such as authority and other ILS-data sets included
- Allow BLUEcloud and discovery clients near real time index updating
- Support Enterprise, BLUEcloud, and Analytics harvest
- Optionally support third party harvest needs

For **Enterprise**, we plan several enhancements around architecture, search relevancy and integration with additional sources of external content, in particular those planned for CloudSource OA along with new eRC connectors.

Beyond the enhancements planned for Enterprise, SirsiDynix has begun to build a completely new discovery tool. Our new discovery is being built using the solid foundation of CloudSource OA search. It will have the following advantages:

- Multi-tenant
- Responsive design
- More out-of-the-box configuration options
- Component-based
- APIs for customization

SirsiDynix Web Services are a powerful, REST-based tool that SirsiDynix uses to manage interactions between the Symphony ILS and many of our newer products including Enterprise/Portfolio, BC Mobile, and our BLUEcloud suite of products. Web Services also includes a software development kit (SDK) that allows SirsiDynix customers and authorized third party vendors the full power of the integration capabilities provided by Web Services.

Generally, we expect to have one-two Web Services releases per year. These releases will continue to be heavily influenced by our BLUEcloud development schedule, for example adding additional functionality around database structures to support Community Outreach along with ongoing work on Cataloging, Circulation, Acquisitions, Serials, and Booking. Web Services updates will also be influenced by enhancement requests from customers and third parties using the SDK to support local development.

- Developments of ILS solutions that are future thinking for evolving solutions, improvements, and other transformations

SirsiDynix: The globally shared experience of the last two years, the COVID-19 pandemic, showed how SirsiDynix can make rapid improvements and quickly evolve to meet circumstances.

SirsiDynix created (and continues to create) more web-based content in the form of webinars and recorded trainings for our customers and prospects to consume. Some of this content is pandemic

University of Maine System RFI Page 16 of 20 Rev. 07/01/2020

DocuSign Envelope ID: 95F586EE-4772-4187-A447-CD5B21B34CC6

Request for Information (IT) – ILS Dated: March 9, 2022

related: helping libraries navigate how to close down, how to open back up, how to serve their patrons while closed, etc.

We also added new features to our mobile app to make virtual access to a library more seamless (such

as self checkout, books by mail, click & collect for curbside access, and more).

All of the above has continued benefit to libraries and to their patrons, even as the pandemic appears to be winding down.

SirsiDynix takes its role as a vendor that focuses on user experience software for staff and library users seriously. The next-generation BLUEcloud Library Services Platform (which uses the Symphony database and Symphony modules, but provides expanded abilities with BLUEcloud staff apps), was developed specifically to use REST web services to expand the traditional integrated library system (ILS) functionality for managing physical materials to offer seamless management of eResources.

eResource Central, the first BLUEcloud application, created a knowledgebase that now delivers eBooks, eVideos, eAudio, eMagazines, and eGovernment documents to discovery and staff applications. These resources were the most technically difficult to integrate given the various readers and digital rights management (DRM) involved.

eArticles and monographs without DRM represent a much lower technical hurdle. With the OA movement gaining steam and widespread acceptance, several services such as Unpaywall offer metadata aggregation of OA content and API update options.

The availability of metadata aggregation and BLUEcloud's well-developed web services framework set the stage for expanding BLUEcloud technologies to include article-level metadata, along with eTextbooks and eBooks—all without the restrictions imposed by DRM. SirsiDynix began creating the **CloudSource Open Access platform (CSOA)** in early 2020 with an ambitious goal to deliver the following key features by 2022:

- aggregation of all known global open access content,
- expansion of the metadata using API integration with trusted sources,
- real-time updates to the index,
- full-featured and flexible discovery,
- documented search API,
- collection management for collection curation, and
- granular usage statistics in COUNTER format.

SirsiDynix began a live pilot program in August 2020, engaging existing customers and non-customers of all types through regular meetings and live deployment of the platform to library staff and end users. CloudSource Open Access was moved from live pilot into General Availability (GA) on schedule in December 2021 with a total of 42 library systems representing more than 400 library outlets.



The incorporation of OA content into the BLUEcloud LSP represents the perfect marriage of physical and digital resources that a library can offer to its users, and personifies the vision of BLUEcloud—using “best of breed” technology to expand the mature and stable functionality of the ILS.

CloudSource OA – Future Plans

Going forward, we plan to expand Open Educational Resources

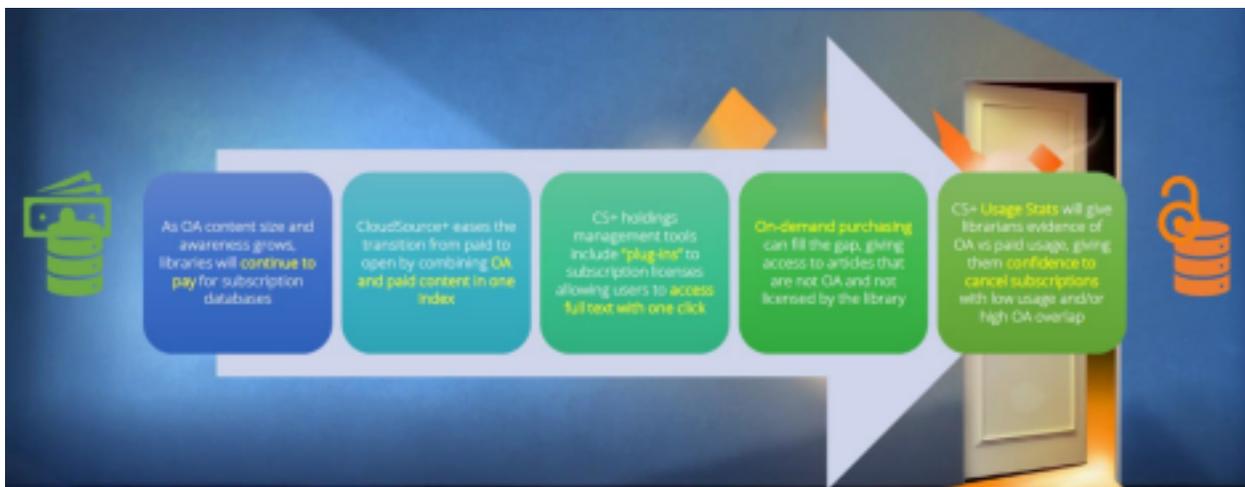
- Current index includes OER Commons and DOAB/OAPEN

Additional sources under investigation:

- OpenStax
- Knowledge Unlatched
- Open Textbook Library
- Government Documents
- Archival Materials
- Other resources suggested by current customers

In addition, we will soon offer CSOA+ (Live Pilot begins April 2022; General Availability (GA) in June 2022)

The diagram below shows the transition from Paid to Open Content available with CSOA+:



CloudSource+

- Collection includes:
 - Open Access content, currently 40M+ resources
 - Closed-Access content, currently 100M+ resources
- Access licensed resources (from EBSCO, ProQuest, etc.) with included holdings management tools
- On-demand options from CCC's Get It Now and Reprints Desk
- Request Forms (ILL, Document Delivery)

Additional **CloudSource+** planned enhancements:

- Ability to set search limits by OA status
 - KBART import and export
 - Improved indexing for non-Article content
 - Books and book chapters
 - Audio and video
 - OER materials
 - Government documents
 - Grow the index to include more popular & trade content
-
- Developments of ILS solutions that allow libraries to effectively communicate with their patrons about information beyond simple catalog holdings

SirsiDynix: We have a fairly recent product that we are continuing to enhance and improve: our **Community Engagement Platform (CEP)**, that gives libraries the ability you are looking for: effective communication with your patrons.

The Community Engagement Platform is a marketing automation tool for libraries. CEP uses data from your SirsiDynix Symphony ILS to streamline and enhance your library's marketing efforts. CEP is built with WordPress, making the tool easy to learn and use. CEP uses data from BLUEcloud Analytics to understand how your patrons interact with your marketing. With CEP, you can organize and publish event programming, manage rooms and equipment, and send targeted emails based on demographics from the patron record. Some of the features available with CEP are outlined below.

Create Targeted Emails. Easily and quickly create branded emails to update your community, promote events, or send newsletters. Draft and schedule your emails with custom layouts or templates. Staff can

create channels for patrons to opt in or out of email marketing, but still receive circulation emails. Send those emails using an integrated email service.

Target Specific Groups with Smart Lists. Instead of having static, disconnected lists on hard drives or in other services, create dynamic lists of patrons and their contact information based on current data from your ILS. Use patron data and behavior as criteria for list building (including email addresses) and targeted messaging.

Publish your Event Calendar. Library staff can add events to an online calendar for patrons to view upcoming programming. Patrons can use the multi-view calendar, search bar, and facet searching to browse or search for relevant library events. They can register for events and purchase tickets when needed.

Simplify Registration and Ticketing. Create tickets for a specific event and have them sent straight to the patron's email so they can add it to their calendar. Staff can mark registrants as attended in CEP manually or using the mobile app to scan the ticket's QR code at the event.

Simplify Room Bookings. Setup rooms for programming with options for room type, availability, and capacity. Book the rooms as you create your event for posting in the calendar. The clean and simple UI allows staff to quickly identify open times in available rooms and even reserve the room outside the advertised time for setup and clean up.

Gain Insights through Reporting. Get insightful metrics on how your emails or events perform and clone campaigns to build on your successes

- Developments of ILS solutions that maintain or improve our current interaction with the
MaineCat/INNreach system

SirsiDynix: Symphony fully supports the NISO Circulation Interchange Protocol (NCIP). NCIP:

- communicates with ILL and document delivery software
- supports integrations with a variety of interfaces, including the following: VDX, ILLiad, WorldCat, FirstSearch; SF Systems, Relais, and Ill's INNReach

The Symphony NCIP responder allows third-party ILL systems to send requests and check user information automatically. It can create temporary records for borrowed items coming into a library and maintain their status through the whole process and the item's return to the lending library. Symphony's NCIP responder supports the Direct Consortial Borrowing DCB3 profile for the NCIP version 1. This allows the library to use ILL solutions such as INNReach.