



APRIL 13, 2016

REQUEST FOR INFORMATION

LiLI STATEWIDE RESOURCE SHARING

Idaho Commission for Libraries  
325 W. State Street  
Boise, ID 83716



# 1. General Information

## 1.1 Request for Information (RFI)

This RFI is to solicit information from companies that can provide the services and/or tools for a statewide resource sharing service among Idaho’s libraries. The responses are intended to provide the Idaho Commission for Libraries with information about the range of products and services available to libraries for conducting resource sharing among a group of libraries and with libraries outside the group. Responses will assist ICfL in evaluating the resource sharing landscape and assessing the viability of pursuing a formal request for proposals for a solution to the agency’s needs.

## 1.2 Timeline and Important Dates

Event	Date and Time
RFI Issue Date	April 13, 2016
Responder Questions Due (See Inquiries, Section 1.4)	April 20, 2016; 5:00pm Mountain Time
Responses to Questions posted online no later than	April 22, 2016; 5:00pm Mountain Time
RFI Responses Due	May 17, 2016; 5:00pm Mountain Time

## 1.3 Contact

The contact for this RFI is ICfL’s Technology & Access Services Consultant. Please include “RFI Resource Sharing” in all subject lines.

Gina Persichini  
Idaho Commission for Libraries  
325 W. State Street  
Boise, ID 83702

or

[gina.persichini@libraries.idaho.gov](mailto:gina.persichini@libraries.idaho.gov)  
208-334-2150  
208-334-4016 (fax)

## 1.4 Inquiries

Questions relating to this RFI must be submitted in writing no later than 5:00 PM Mountain Time, April 20, 2016 to the contact listed above. The inquiry must include an email address or fax number to receive a response. Please include “RFI Resource Sharing” on all correspondence.

All responses to inquiries will be shared at <http://libraries.idaho.gov/rfi-resourcesharing> to be available to all potential responders by 5:00pm Mountain Time, April 22, 2016.

## **1.5 Response Format and Submission Requirements**

If you are interested in providing the information requested in this RFI, please submit your response to the contact listed above. PDF format is preferred, but Microsoft Word is also acceptable.

Responses must be received by the Idaho Commission for Libraries no later than 5:00pm Mountain Time, May 17, 2016. Please include "RFI Resource Sharing" on all correspondence.

## **1.6 Responses**

All responses should include answers to the questions listed in Section 4.

## **1.7 Notice**

This is not a solicitation for quotations, bids or proposals. No contract award will result from this Request for Information (RFI).

The Idaho Commission for Libraries (ICfL) shall not be obligated to contact any respondent, to purchase goods or services related to this RFI from any respondent, or to use the content of any response in a future RFP.

ICfL will, at its sole discretion, determine whether or not to proceed with a solicitation for statewide resource sharing services. Response to this Request for Information is NOT mandatory in order to be considered for any future solicitations.

It is entirely the respondent's responsibility to keep itself informed of the ICfL's issuance of any future solicitations. ICfL assumes no liability for failure of respondents to obtain and respond to any such solicitation.

## **1.8 Cost of Preparing a Response**

Costs of preparing a response are the sole responsibility of the respondent submitting the response. ICfL shall not provide reimbursement for such costs and shall not be liable for any response preparation costs.

## **1.9 Trade Secrets**

Paragraph 28 of the Solicitation Instructions to Vendors (<http://purchasing.idaho.gov/pdf/terms/Solicitation%20Instructions%20January%202016.pdf>) describes trade secrets to "...include a formula, pattern, compilation, program, computer program, device, method, technique or process that derives economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by other persons and is subject to the efforts that are reasonable under the circumstances to maintain its secrecy. If you consider any material that you provide in your Bid, Proposal or Quotation to be a trade secret, or otherwise protected from disclosure, you

MUST so indicate by marking as “exempt” EACH PAGE containing such information. Marking your entire Bid, Proposal or Quotation as exempt is not acceptable or in accordance with the Solicitation or the Public Records Law and WILL NOT BE HONORED. In addition, a legend or statement on one (1) page that all or substantially all of the response is exempt from disclosure is not acceptable or in accordance with the Public Records Law and WILL NOT BE HONORED.”

**1.8.1** Identify with particularity the precise text, illustration, or other information contained within each page marked “trade secret” (it is not sufficient to simply mark the entire page). The specific information you deem “trade secret” within each noted page must be highlighted, italicized, identified by asterisks, contained within a text border, or otherwise clearly delineated from other text/information and specifically identified as a “trade secret.”

**1.8.2** Provide a separate document entitled “List of Redacted Trade Secret Information,” which provides a succinct list of all trade secret information noted in your response; listed in the order it appears in your submittal documents, identified by Page#, Section#/Paragraph#, Title of Section/Paragraph, specific portions of text/illustrations; or in a manner otherwise sufficient to allow the State’s procurement personnel to determine the precise text/material subject to the notation.

If you fail to follow the RFI instructions as they relate to the identification of trade secret information; or to otherwise identify trade secret information with particularity, your trade secret notation(s) may not be honored.

## **2. Purpose**

This RFI is to solicit information from companies that can provide the services and/or tools for a statewide resource sharing service among Idaho’s libraries. The responses are intended to provide the Idaho Commission for Libraries (ICfL) with information about the range of products and services available to libraries for conducting resource sharing among a statewide group of libraries of all types and with libraries outside the state. Due to the wide range of technology and practices in the current environment, ICfL recognized that a one-size-fits-all solution may not be practical and a hybrid approach utilizing activities carried out both centrally and by the individual libraries may be an option for a future program. Responses to this RFI will assist ICfL in evaluating the resource sharing landscape and assessing the viability of pursuing a formal request for proposals for a solution to the agency’s needs.

## **3. Background Information**

### **3.1 Idaho Commission for Libraries and Libraries Linking Idaho**

The mission of ICfL is to build the capacity of libraries to better serve their communities. One ICfL program that contributes to the mission is Libraries Linking Idaho (LiLI). LiLI is a group of projects and services that bring networked library service to the residents of Idaho. The LiLI program fosters collaboration among libraries for interlibrary sharing, keeping up with technology trends, and developing cooperative services like group subscriptions for digital content and access to physical collections.

In 2003, the LiLI program conducted a pilot project to introduce libraries to online methods of interlibrary loan and cataloging. A report on the pilot project is available at

<http://libraries.idaho.gov/files/rs-project-report.pdf>. To that point, Idaho's public libraries were largely not participating in resource sharing services or doing so using print mail, fax, or email to send and receive requests for materials. Only a small number of the public libraries were using electronic request systems. The academic libraries were largely using OCLC cataloging and interlibrary loans services, and about 10 or fewer schools had resource sharing services in place. After the successful pilot project, the LiLI Unlimited statewide resource sharing service was developed.

LiLI Unlimited launched in 2004. Currently 161 libraries of all type participate in the program. It includes access to OCLC cataloging and interlibrary loan tools for all participating libraries in addition to a subscription to OCLC's WorldCat through FirstSearch for all publicly funded libraries in the state. Initial enrollment was strong and grew, but a number of changes have resulted in decreasing participation. Some factors include:

- Many smaller libraries moved to automated catalogs with improved access to MARC records through alternate sources.
- Libraries experienced budget cuts resulting in the inability to pay for shipping/mailing costs associated with interlibrary loan.
- Libraries with little resource sharing activity (e.g. 10 or fewer transactions a year) are unable to keep staff trained or comfortable using the requesting systems.
- Staff with low resource sharing needs have found purchase-on-demand to provide a less-expensive and faster delivery of requested materials.
- Improve local arrangements for intra-consortia sharing have reduced the amount of ILL taking place outside consortia.

Libraries participating in the LiLI Unlimited program contribute an annual fee (<http://libraries.idaho.gov/files/FeeSchedule2015.pdf>) based on the type, size, and activity level of the library. Fees currently in place range from \$350 to \$84,353 for a library's access to cataloging and resource sharing tools. In addition to libraries' contributions, ICfL contributes funds for the service contracts.

In 2015, ICfL contracted for a resource sharing needs assessment. The summary of findings included the following that may be of interest to potential responses to the Request for Information.

- Public libraries and academic libraries have distinctive lending and borrowing partners: public libraries tend to borrow and lend with other public libraries, and academic libraries also tend to borrow and lend with other academic libraries primarily.
- Public libraries also tend to limit activity to in state and within consortium libraries, while academic libraries go further afield.
- Patrons are far more aware of materials and are requesting more because of increased access to the Internet and library databases.
- Libraries tend to purchase current popular print materials and DVDs rather than borrow these items, reserving ILL for out of print and older items. Ebooks and ejournal articles do not represent a measurable segment of sharing activity in public libraries at this time, possibly due to licensing restrictions and library technology readiness.
- Although OCLC ILL services are necessary and critical for resource sharing in Idaho, OCLC activity is declining while overall ILL activity is on the rise. These trends should continue to be monitored.
- Rising costs of OCLC participation fees and delivery are a significant problem, and are unsustainable for some libraries.

- Shared catalogs and reciprocal agreements among neighboring libraries (despite distance) provide value.

### **3.2 Idaho Libraries**

Idaho has 103 public library jurisdictions providing service through 144 library locations. Those libraries serve a total population of 1,364,648 individuals according to the Fiscal Year 2014 Idaho Public Library Statistics. Additionally, Idaho has 7 publicly funded academic institutions and 6 publicly funded special libraries providing resource sharing services to their users. There are 115 public school districts in Idaho and 48 charter schools totaling 728 schools in the state. A list of the publicly funded libraries of all types with available information about population served, collection information, and resource sharing activity can be found in Attachment A. The publicly-funded school and special libraries listed in the attachment include only those with recent resource sharing activity.

### **3.3 Current Environment**

When planning for statewide resource sharing among Idaho libraries, the following consideration about the current environment should be considered:

- Approximately 20-25 percent of the public libraries do not have an automated catalog or may have a system in place that does not include features compliant with resource sharing technical protocols. The known automated systems in use are identified in Attachment A.
- Libraries using barcodes may not use standard barcode styles or have unique library identifiers within the state.
- Some Idaho libraries are members of a shared ILS. Libraries participating in a shared ILS are identified in Attachment A.
- There is no single union catalog for Idaho libraries. Most Idaho libraries utilize WorldCat for the discovery step in resource sharing.
- Many public libraries in Idaho have small numbers of staff. 47 have fewer than 2 FTE employees, and, of those, 27 have 1 or few FTE.
- Public libraries in Idaho have a wide variety of population served ranging from as large as 216,282 to as small as 88. There are 21 public libraries serving fewer than 1,000 residents in their service area.
- Materials delivery for resource sharing utilizes a mix of commercial shipping methods and arranged courier/delivery service. In a recent survey of libraries, 30 percent of respondents indicated a use of a local or regional library courier and 79 percent indicated use of USPS, FedEx, UPS or similar services. Idaho libraries do not have available a statewide delivery service.
- The combination of both library contributions and ICfL contributions to a statewide resource sharing effort are not sustainable from the current to future environment. Budget constraints require solutions with costs less than the current system in place.

## **4. RFI Response Content**

The following information should be provided in your response, with answers to the questions listed below.

### **4.1 Company Information**

- 4.1.1 Please provide a brief overview of your organization.
- 4.1.2 How do you see multi-type resource sharing solutions evolving in the library industry?

## **4.2 Solution Features and Functionality**

- 4.2.1 Summary of Solution – Please provide a brief summary of your organization’s statewide resource sharing solution(s) in no more than a single page.
- 4.2.1 Interface – How do library staff interface with the solution(s) described?
- 4.2.2 Patrons – How do users submit requests for materials in the solution(s) described?
- 4.2.3 Patron data – How does one keep patron data protected in the solution(s) described?
- 4.2.4 Bibliographic data – How do you envision library staff would discover and validate the availability of materials at other libraries in a group? Describe the borrowing process(es), and the process(es) of sharing MARC records or access to holdings information.
- 4.2.5 Transactions – Describe the process for library staff to request an item, and the process for a lending library to respond to a request.
- 4.2.6 Reports – What type of data is available for measuring the success of the solution(s) described?
- 4.2.7 System Requirement – What minimum technology requirements are needed by libraries to participate in the type of solution(s) described above?
- 4.2.8 Implementation – What activities and time are needed to implement the solution?
- 4.2.9 Other Information – Please provide any additional information that will describe how the solution(s) would work from a library staff and patron perspective to give the reviewers a picture of potential future scenarios.