1. Please provide the following information about the size and composition of your library collections. Please provide the numbers for each library for:

* Total number of bibliographic titles (including e-books)

***MOBIUS RESPONSE:****This information was provided in the original RFP in Appendix A.*

* Total number of unique e-journal titles

***MOBIUS RESPONSE:****MOBIUS member libraries do not store all of their e-journals in Sierra (our current integrated library system) so we can’t confidently provide you a grand total with absolute certainty.  We have identified approximately 246,275 records across all Sierra servers that are coded as “e-journals” or “non-e-book” online materials.*

* Total number of digital objects (If applicable)

***MOBIUS RESPONSE:****This isn’t applicable.*

* Size of your digital collection (in MBs)? (If applicable)

***MOBIUS RESPONSE:****This isn’t applicable.*

1. What is the total number of individuals who will require login access to the system (including part-time staff)?

***MOBIUS RESPONSE:*** *MOBIUS currently has 528 staff licenses across our various Sierra servers. We have 1085 staff login accounts who share these staff licenses since some people have more than a single staff login (some of these logins may no longer be used but they have not been deleted).*

1. What is the total number of end users and patrons (that is, FTEs) who need access to library online services?

***MOBIUS RESPONSE:*** *The FTE for Fall 2020 across all of our servers is 140,474.*

1. What other systems are in use at your campuses (ERM, DAM, Remote Storage, etc)?

***MOBIUS RESPONSE:*** *MOBIUS member libraries may employ other library applications locally as long as they support them. As such, we don’t keep a list of other systems being used by a library that we don’t manage. The exception to that would be if we need to assist with a script, for example, to help a library automatically populate a third-party discovery layer. A list of shared applications and libraries using other discovery systems can be found* [*here*](https://mobiusconsortium.org/shared-ils)*.*

1. Describe services provided to members by the central unit (for example, configuration, cataloging).

***MOBIUS RESPONSE:*** *MOBIUS provides unlimited training and help desk support on issues related to the integrated library system and the union catalog. MOBIUS does not perform any cataloging or other “staff” functions. MOBIUS acts as a shared operational and systems resource for our member libraries. A list of routine help desk operations can be found* [*here*](https://mobiusconsortium.org/help-desk-operations)*.*

1. Do members today share the same configuration definitions? Please also describe any subgroups of member libraries sharing environments or configurations**.**

***MOBIUS RESPONSE****: MOBIUS member libraries share a server. A list of libraries by cluster can be found* [*here*](https://mobiusconsortium.org/members-by-cluster)*. These libraries share settings on that server (for example, item types are defined on the server, not by each library and if a new one needs to be added, it can be and then used accordingly) but financial, vendor, and funds, along with loan periods, fines and fees (if any) and any of the specifics that constitute the patron experience are defined by each library. MOBIUS does not impose a set configuration on our member libraries as they interact with their own patrons.*

*The only caveat is that member libraries who willingly share their materials across the INN-Reach (union) catalog do agree to a common set of loan policies, so they are uniform across the state and the consortium. That way one library doesn’t have a more generous (or restrictive) loan policy than another.*

1. Do you have a shared catalog or catalogs across the consortium(a shared Metadata Management System where institutions contribute and share a single, de-duplicated set of bibliographic records)?

***MOBIUS RESPONSE****: MOBIUS currently uses Innovative Interface’s INN-Reach union catalog as our shared catalog across the consortium. More information on that can be found* [*here*](https://mobiusconsortium.org/inn-reach) *and* [*here*](https://www.iii.com/products/resource-sharing/)*.*

1. Do you have a central unit that manages acquisitions operations for members? If yes, describe the central operation (the central negotiation, central acquisitions, and central activation of e-resources)

***MOBIUS RESPONSE****: No.*

1. Can patrons borrow resources from any member (walk in and borrow resources from another member)?

***MOBIUS RESPONSE****: Yes  
.*

1. Can patrons access e-resources licensed by any member?

***MOBIUS RESPONSE****: No. However, MOBIUS does offer a shared eBook and Audiobook collection called “eMO.” This is a shared subscription service featuring more than 212,000 titles and 7 different EBSCO eBook collections. This collection covers a broad range of subject areas and MOBIUS members can subscribe to this collection at very affordable rates. All titles have unlimited simultaneous usage and are downloadable. More information on our eMO collection can be found* [*here*](https://mobiusconsortium.org/node/28)*.*

1. Regarding your electronic resource management, do you share subscriptions across multiple member institutions? If yes, please describe the sharing model.

***MOBIUS RESPONSE****: No.*

1. What do you expect your patrons to search in the discovery interface (for example the local institution only, the entire consortia)?

***MOBIUS RESPONSE****: Both. Currently, each library has a “slice” or “scope” of the catalog for their own purposes so patrons can search just that member library. However, the entire “cluster” or group sharing that server instance can be searched at the same time so for example, if you cared to search just the Kansas City area libraries for a title, you could. Finally, the union catalog can be searched if an individual would like to search “everything.” Depending upon the need, you might search a library, a group of libraries or the entire consortia.*

1. Under “ILL’s Reserves, Circulation, Scheduling & Bookings” section 5 (“Patron Records, Management, Communication, etc”), point “G” says “Describe if the proposed system requires the creation of something akin to ‘global’ patron records.”  Please elaborate on the meaning and intended functionality of “global patron records”

***MOBIUS RESPONSE****: What we meant with the term “global patron records” is that there would be a consistent template or set of parameters for patron records and that they would not be “duplicated” as needed across the consortium. We believe that patron data should live “locally” and not be duplicated to facilitate a transaction.*

1. Under “Patron Experience” section 1 (“Privacy”), point “E” says “Describe the protections available when transferring patron data to external systems.”  What is the nature of the transfer of patron records to external systems?  What specific external systems does MOBIUS or its members anticipate transferring patron records to?  Does the transfer envisioned in this question include SIP2 and NCIP calls?

***MOBIUS RESPONSE****: The transfer of patron data to third party applications (for example, self-check machines, registrar or bursar systems) is currently done through SIP2 and/or NCIP calls.*

1. Under “Collection Management” section 4 (“Cataloging”), points “N” and “O” refer to the desire for “automated alerts” when editing, importing, or exporting records.  Please describe the nature of the desired automated alerts—under what conditions would an alert be created?  What actions would a librarian be expected to take when they receive an automated alert?

***MOBIUS RESPONSE****: MOBIUS would like the Vendor to describe any automated alerts related to editing, importing, or exporting (erroneous entries, invalid data, etc). Staff would then take the appropriate steps to mitigate and/or resolve the problems identified thanks to the alerts.*

1. Under “Migration, Training & Customer Service” section 1 (“Migration”), point “F” asks “Will the Vendor be able to migrate Sierra transaction data?”  What is the nature of the transaction data to be migrated?  For instance, is it just outstanding circulation records at the time of migration or does it include historical data?

***MOBIUS RESPONSE****: MOBIUS is interested in migrating as much of our data as possible, including transaction and historical data. If this requires additional pricing considerations please details those as fully as possible.*

1. Under “Resource Sharing Solution” section 1 (“Resource Sharing Option”), point “E” says “Describe if a common set of patron parameters can be centrally managed for all members. If this is possible, please detail how this works.”  Please elaborate on what types of patron parameters you have in mind for this question.

***MOBIUS RESPONSE****: Can a common set of loan periods, patron eligibility requirements, bills, and fines be applied to all patrons or specified groups of patrons for borrowing and loaning across the consortium?*

1. In Appendex A (“MOBIUS Libraries & Corresponding Data”), what is the nature of the column labeled “# of licenses” and how does the existing nature of those licenses impact MOBIUS’ desires for a new system?

***MOBIUS RESPONSE****: With our current Sierra system, one of the metrics related to pricing is the number of simultaneous staff user licenses that are in use at the peak time of the workday. While a library may have an “unlimited” number of people searching the public catalog and an “unlimited” number of staff accounts, only a certain amount may be in use at one time. MOBIUS wants to insure that we have a sufficient number of active staff user licenses for all of member libraries with any new system we may employ.*

1. In Appendix B (“MOBIUS - Current Software Configuration”), the cataloging section includes “SCAT Tables”.  What is a SCAT Table, and is the nature of SCAT Tables included in the functional description earlier in the RFP text?

***MOBIUS RESPONSE****: The Statistical CATegories (SCAT) table assigns ranges of call numbers to statistical groups and allows the configuration of statistical reports based on call numbers.*

1. In Appendix B (“MOBIUS - Current Software Configuration”), the circulation section includes “Circa Inventory Control”.  What is Circa Inventory Control, and is the nature of this functionality included in the functional description earlier in the RFP text?

***MOBIUS RESPONSE****: Circa is a web-based inventory management system. Staff would like to have the ability to scan books on the shelf and update the item record to verify the inventory field in the record.*

1. At the end of Appendix B (“MOBIUS - Current Software Configuration”), there is a description of interoperability with Colorado’s Prospector system.  Is there a requirement of equivalent interoperability in the new system?  If so, please provide a more complete description of this interoperability.

***MOBIUS RESPONSE****: Interoperability of various systems is something we enjoy currently. Patrons from MOBIUS should be able to request from Prospector and vice versa using a shared set of values.*

1. Please describe any form-of-response and contractual expectations by MOBIUS for vendors considering the submission of a joint response to meet the two main RFP objectives.

***MOBIUS RESPONSE****: MOBIUS has no restrictions on vendors considering a joint response to the main RFP objectives. However, we would like the Vendor(s) to be clear on which vendor is proposing which component(s) and provide pricing information as appropriate.*

*Likewise, if a Vendor chooses to bid on only one part of the RFP, while that is not preferred, it will be given due consideration.*

1. Our organization offers both a comprehensive ILS/Resource Sharing and standalone resource sharing solution.  If we wish to offer these as options so you could purchase either or both, should we submit two responses?

***MOBIUS RESPONSE****: While we leave it to the Vendor’s discretion, two separate responses may make it easier for the committee to evaluate each in its totality, although it isn’t a requirement.*

1. If we propose a solution to one, but not both objectives, please confirm we must also respond to the following sections.  Are there any others?

***MOBIUS RESPONSE****: The following sections should be filled out and/or acknowledged regardless of which section(s) the vendor is responding to.*

* Reporting, Analytics and Statistics
* Migration, Training & Customer Service
* Vision & Ideas for the Future
* Cost Form
* Appendix G (IT Security)
* Appendix H (Vendor Acknowledgement Form)

1. On p. 9, the RFP lists Cost, Functionality, and Experience & Reliability as the evaluation criteria.  Are there weighting factors for these?  What are the consequences for each factor?

***MOBIUS RESPONSE****: No weights or weighting factors have been predetermined in evaluating the responses to the RFP.*

1. On p.10 it states “Appendices D, E and F, must be completed as an attachment separate any other pricing documents that may be included by the Vendor.”

***MOBIUS RESPONSE****: That is correct.*

1. Please clarify if we must provide the pricing tables separate from our technical response?  Or should they be in the same document as technical responses, just separate from any *other* pricing documents we might provide?

***MOBIUS RESPONSE****: The intent is the latter; please separate out pricing information from the technical response so that they are not all together in one document since we will have different people evaluating the technical and pricing information.*

1. How will MOBIUS consider in its evaluation functionality not currently available and that can’t be demonstrated?

***MOBIUS RESPONSE****: MOBIUS asks each Vendor to provide as much information as possible (including timeline and any other commitments) as part of their response.*

1. Will vendors with content agreements in place with MOBIUS receive preferential scoring for their related discovery services?

***MOBIUS RESPONSE****: No. MOBIUS intends to score each response on its merits. Prior agreements with MOBIUS will not be a factor in our deliberations.*

1. Is MOBIUS primarily interested in hosting the solution for the consortium or is a cloud-based system an option?

***MOBIUS RESPONSE****: A cloud-based solution is definitely a viable option. While MOBIUS previously hosted our Sierra servers locally, for the last few years they have all been hosted by Amazon Web Services (AWS).*

1. IV. System Management, F. Reliability & Performance, q.2: “Describe the availability of all of the offline functions with the proposed solution”

Can MOBIUS please indicate what offline functions member libraries may utilize?

***MOBIUS RESPONSE****: The following offline functions are currently available to our member libraries:*

* *Check In*
* *Check Out*
* *Renew*
* *Creating a new patron record*

1. VII. Openness and Interoperability, B: Interoperability with Open and Commercial Products & Services, q.10: Describe what Automatic Storage & Retrieval systems the proposed system integrates with seamlessly (i.e., Dematic, HK, LAS, etc.).”

Can MOBIUS provide a list of what systems member libraries may be looking to integrate with the new LSP?

***MOBIUS RESPONSE****: We don’t have another specific system in mind at this point in the process. We are looking for how open is the Vendor to other systems that other libraries and perhaps more importantly, other consortia, are using?*

1. IV. Fines, Payment Fees, Blocks, Notices, Billing, q.O: “Describe the options available if the proposed solution has a reconciliation feature (i.e., Collection Agency).”

Could MOBIUS please provide additional examples of reconciliation features, or elaborate further on what they are looking for?

***MOBIUS RESPONSE****: We are looking at what level of interoperability the Vendor has with other systems, such as a Bursar’s Office or with a collection agency, such as Unique Management.*

1. VI. Scheduling and Booking, q.B: Describe if eligible material scan be combined in a single booking”

Could MOBIUS elaborate on if several different types of equipment (such as tablets, cameras, microphone, print book, etc.), or, if more than one resource can be included within the single instance of a loan/booking?

***MOBIUS RESPONSE****: For those libraries that use the Sierra Bookings module/features, the ability to schedule and group multiple items/components into a single booking is essential. For example, reserving a specific study room the each Friday in October, from 9-10 am and have a tablet, flip chart, and other materials grouped together as part of the booking is something we are interested in.*

1. Acquisitions, q.C-1: Describe in Detail the functionality typically associated with the following acquisitions functions – Automated Selection.

Could MOBIUS elaborate on what aspects of acquisitions that are looking to be automated?

***MOBIUS RESPONSE****: MOBIUS is interested in any automated features related to patron driven acquisitions and how this would work in a consortium like ours.*

1. IV. Cataloging, q.M: Describe if the proposed solution includes any record queues of any kind.

Could MOBIUS please elaborate on what is meant by “Record queues?”

***MOBIUS RESPONSE****: With our current system, large group of records (in the tens of thousands) can’t be indexed in “real time” so a queue (or a backlog) is created. The larger the queue, the longer it will take for records to load and be fully indexed. Since MOBIUS loads nearly 100 million records per year of various kinds, automating this process and having it be fast and thorough is essential.*

1. Could you let us know how many MOBIUS libraries are utilizing the Sierra Materials Booking module?

***MOBIUS RESPONSE:****Currently, we have three libraries using the Bookings module, however, many more have expressed interest in it over the years and this is integrated functionality that our libraries are interested in.*

1. How many membership libraries are using scheduling and booking? Are any member sites using LibCal (SpringShare’s event calendar, equipment & Spaces booking service)?

***MOBIUS RESPONSE:****We do not offer subscriptions to LibCal so have no way of knowing which of our libraries subscribe to it or any other scheduling and booking software.*

1. How are policies determined at the cluster level? Is this something that is coordinated at the consortia level, or are libraries given autonomy?

***MOBIUS RESPONSE:****The libraries determine their own policies at the cluster level.  Libraries are given their own autonomy as much as possible.  We only have coordinated policies at the consortia level when it comes to resource sharing via INN-Reach.*

1. If we propose a solution for just one objective, would we also need to respond to questions in the “Systems” section (starting on p. 11 of the RFP)?

***MOBIUS RESPONSE:****We suppose the answer to this is up to you. The more information we get, the better. You don't want to risk us missing some vital piece of information.*