Submitted and answered 3/6/2023 (summary of meeting)

Q: When asked, "Would you like to make changes to your current hosting?" PaILS responded that it would not like to make any significant changes. If a vendor were to offer cloud-based hosting [current hosting is in a datacenter], would that fall into the category of "significant changes" or should that proposal be included in the RFP?

A: That would fall under "planning and implementation" in the RFP. PaILS would need to know what this change would entail. Our main goals with this RFP are to increase transparency related to pricing, uptime, and reasons for downtime. If this hosting change would improve any of those aspects, that would be appealing to PaILS.

Q: Does PaILS require an Asterisk server setup?

A: No, and this was an error on the RFP, a correction will be issued.

Q: Does PaILS require separate IP addresses for z39.50 and reporter connections:

A: No, clarification is as follows: SFTP connection to allow PaILS staff to edit OPAC templates / view report outputs & notices; multiple Z39.50 outward-facing logins for libraries who need to expose item availability to vendors.

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Q. What transition and implementation services should be outlined in the proposal?

A. Vendors should respond with the necessary implementation steps to host the SPARK consortium on its platform – if there is no implementation/transition necessary then those services do not need to be listed. This RFP is only soliciting proposals for Evergreen hosting so proposals that outline transitions to other ILSes will not be considered.

Q. Does PaILS wish to make changes to the current software hosting arrangement?

A. PaILS does not wish to make significant changes to its current hosting/support arrangement. There are many aspects of our hosting for which we would like to examine options (such as the additional desired services listed on pages 7 and 8 of the RFP) as well as have transparent pricing for costs per org unit.

Q. Does PaILS or the PaILS Board have any strategic goals related to the ILS or related technologies and services in their 5 year plan? Would it be possible to request a copy of

any strategic or technology planning documents for review?

A. PaILS has significant 'capacity' and 'community' goals that relate to ILS and related products. Please feel free to review the following strategic plan documents: PaILS 2022-2025 [Strategic Priorities](#) (update & refresh of previous [Strategic plan](#) from 2017)

Q. Are there current pain points that PaILS libraries are experiencing with Evergreen or ILS services? What are the top areas where PaILS would like to see improvements?

A. 1. Transparency of pricing in terms of various costs (additional services vs regular services, pricing for both existing and new organizational units)
   2. Outage reporting – increased transparency around outages and smaller database issues, such as problems with individual services (like notices or reports)
   3. Consortial growing pains: increased hold volume, increased z39.50 traffic for ILL integrations

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Q. What's on the ILS "wish list" which could support PaILS libraries better?

A. 1. API integrations: we use services which require frequent data extracts to manage in lieu of direct database connections, such as:
      a. ChiliPac – new cover images do not always display due to the frequency of updates between Evergreen and ChiliFresh
      b. Collections HQ: we only have one member using this service, it requires significant extracts to be performed regularly

   2. SMS handling: many SMS handling options are not available to Evergreen at this time.

   3. Penalties refresh: helping fine-free libraries have increased options for blocking some services and/or producing notices based on those restrictions.

Q. Are there additional services desired which are not currently being provided by your current vendor? We can include any additional services desired in our response (e.g. bundled authority control) Are third party integrations acceptable?

A. There are additional desired services listed on pages 7 and 8 of the RFP and one of those is authority control. Third party integrations are acceptable. We have issued a correction to page 7 to specify that catalog/MARC cleanup projects, in particular deduplication, should be addressed in the 'data work' section.

Q. Page 10 mentions a video file in the Response Format section. Is there a video component to this RFP?

A. There's no video response portion, that is an error, and we will issue a correction on the website.

Q. What are PaILS' expectations for member library add-ons in the next 1-3 years?

A. PaILS does not (as of 2/27/2023) have any libraries committed to migrating into our consortium. We are in talks with several library systems and would anticipate adding anywhere from 10-20 locations per year for the next 3 years. Due to our grant funding, we would likely only migrate in one multi-library system and one single-location library per funding year.

Q: Will responses to questions come as you receive them or will they all be going out on March 3rd? If the latter, could we please arrange a video meeting with you all to discuss these questions?

A: We will post responses as they are available. We can also schedule a video meeting to go over these or additional questions and then we can publish a summary of anything we discuss.

RFP corrections:

Pg 7:
Data work: data cleanup projects in any area of the ILS. **CORRECTION** 2/21/23: Provide pricing for catalog/MARC cleanup projects, in particular deduplication.

Pg 10:
Response Format
The response to this RFP should be submitted as follows. ~~A link to download the files would be appreciated given the likely large size of the video file.~~ **CORRECTION 2/21/23**: There is no video portion of the requested response. Response items can be submitted with links or as email attachments.