

**University of Maine System
Library Web-Scale Discovery Services for Higher Education - RFP# 2016-021
ADDENDUM #01**

QUESTIONS

1. For sizing purposes, please provide the total number of item records, bib records and annual circulation per campus. This way we will be able to provide a campus-by-campus pricing.

ANSWER:

Campus	Total Bib Records	Total Item Records	Annual Circulation
University of Maine	2,615,383	2,436,599	52,563
University of Maine at Augusta	371,843	201,325	5,671
University of Maine at Farmington	291,219	127,059	22,390
University of Maine at Fort Kent	307,149	135,517	6,640
University of Maine at Machias	312,264	120,055	4,050
University of Maine at Presque Isle	353,228	185,374	1,579
University of Southern Maine	665,397	639,643	17,577

- Total Bib records: each location includes substantial numbers of shared system-wide electronic resources bib records (i.e. the total number of bibs is not the sum of all locations). Bib records numbers taken Nov 2015.
 - Total Item Records: each location includes 52,360 shared system-wide electronic resources item records. Item records based on stats taken July 1, 2015.
 - Annual Circulation: libraries' patron circulation for July 2014 - June 2015. Includes reserves and equipment.
2. Please confirm that this RFP does NOT include other related Maine InfoNet member systems that also use Innovative's Sierra: Minerva, Small Libraries "Sierra Lite" consortium, Portland Public, U. of New England.

ANSWER: Correct, this RFP does not include other MIN member systems.

3. Please confirm that due date for response is Nov 19 at 2pm **Eastern**.

ANSWER: YES

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4. Submissions: Please clarify/confirm that an electronic submission can be a response delivered via an attachment in email?

ANSWER: Yes

5. Please confirm or deny that a paper copy needs to be submitted, and submission date.

ANSWER: Only Electronic Copy is required to the address noted on the cover sheet.

6. Does the University want us to include costs for platform options such as servers, and/or hosting and/or the spec for servers that would enable the University to purchase their own? If so, where would the University like us to supply that information and the various options?

ANSWER: Please provide quotes for both hosted solutions and for those where the University hosts the server if you have both. In the case of the University-hosted solutions, please provide the necessary specs. There is no need for you to provide costing for University servers, as we will handle that ourselves.

Please supply the information on Exhibit 1 Table 1 and note the description of the cost under 'Item Description'. As a reminder please follow the instructions in the RFP on page 33 stating '*Respondents are required to provide separate costs for each institution, as well as, pricing for enterprise licensing (all seven campuses).*'

Please refer to revision to Table 1 Exhibit 1 at the end of this document – (Modified –Appendix B – Cost Response Form)

7. Can you please explain/clarify the difference between the cost information requested in Exhibit 1 (Table 1) and Exhibit 1 (Table 3)

ANSWER:

Exhibit 1 Table 1 – Is where each respondent will provide the Licensing and Maintenance Agreement Pricing and/or Data Maintenance/Subscription Pricing, refer to page 33 of the RFP for a detailed explanation.

Exhibit 1 Table 3 – Additional products or services offered by the Respondent that would compliment the product for web-scale discovery services.

8. Page 9, 1.18 Multi-Institutional - The University of Maine System, Office of Strategic Procurement reserves the right to authorize other University Institutions to use the Agreement(s) resulting from this document, if it is deemed to be beneficial for the University to do so. Does this refer only to University of Maine System institutions?

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ANSWER: Refer to Section 26 of the Master Agreement *'Multi-Institution Capabilities University will have the option to include products and services under this Agreement to additional University institutions, this includes any additional University institutions formed during the term of this agreement, all facilities utilized by an institution including those managed and/or owned by a third party, and additional entities, such as, the University College a division of University of Maine at Augusta.'*

9. Page 18, 4.1.5 – Provide a statement that details how many subscribers use your product line. Include in the response the percentage of subscribers are higher education libraries and how your current subscribers view the service provided. As you have also requested a client list and three customer references, please explain how “subscribers” differs from clients or customers.

ANSWER: The term “Subscribers” is the same as customer in “customer references” and client in “client list.” Sorry for the confusion.

10. Page 28, 8.1.3 – As this section asks that vendors submit their Service Level Agreement, may vendors also submit their complete standard agreement?

ANSWER: Respondents must use the University standard Contract for Services Master Agreement which was submitted for review in the RFP package. Refer to Section 8 in the RFP for Contract for Service Requirements.

11. The University of Maine System has indicated it may “award Agreement(s) to one or multiple Respondents, which may include awards to Respondents for a geographical area, if such award is in the best interest of the University”. Are we to assume that each individual University/campus will have an option to purchase the solution of their choice, thus the required pricing for each University?

ANSWER: The intention is to select an enterprise solution, however we reserve the right to award based on the best interest of the University. A campus within the University may choose not to proceed due to budgetary or for other reasons. As noted on Page 32 “**Respondents’ are encouraged to provide additional price incentives for providing an enterprise solution or award of multiple institutions.**”

Regarding the question on required pricing please following the instructions in the RFP pages 33 and 36 stating *'Respondents’ are required to provide separate costs for each institution, as well as, pricing for enterprise licensing (all seven campuses).'*

Please refer to revision to Table 1 Exhibit 1 at the end of this document – (Modified –Appendix B – Cost Response Form)

12. For clarification, the Future Growth and Enhancements Pricing section is what the University of Maine System will assume as optional?

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ANSWER: Yes, these may also be complimentary but related software modules, for example.

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13. For each University, can you please provide counts for the number of bibliographic records in the catalog in addition to the number of non-bibliographic records to be made discoverable through this solution? The number of non-bibliographic records means any other record representing a resource that is not included in the catalog (excluding e-journal subscriptions). (E.g. Lib guides and records representing documents, images, and objects from digital repositories.)

ANSWER: Libguides = 704 guides and counting; Other non-bib records=22,200 give or take. The numbers in the chart are there with the understanding that they will increase or decrease depending on the library's needs.

Campus	Bibliographic	Libguides	Other non-bib
University of Maine	2,615,383	197	19,687
University of Maine at Augusta	371,843	67	0
University of Maine at Farmington	291,219	209	0
University of Maine at Fort Kent	307,149	26	0
University of Maine at Machias	312,264	39	
University of Maine at Presque Isle	353,228	13	
University of Southern Maine	665,397	153	2,495

- Total Bib records: each location includes substantial numbers of shared system-wide electronic resources bib records (i.e. the total number of bibs is not the sum of all locations). Bib records numbers taken Nov 2015.

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14. Under Section 1.2 and again in Rider A it is described that each University participates in a collection of core shared databases and open access resources, but also maintains its own campus-specific databases, institutional repositories, and other collection resources. Preceding this statement in Section 1.2 it states “The University of Maine System is seeking responses to provide a single library search box discovery tool, giving its libraries and researchers a Google-like experience to the catalog and databases.” Are we to assume that each University/campus will want their own campus-specific databases, institutional repositories, and other collection resources discoverable by the entire University of Maine System? Taking into consideration that “discoverable” doesn’t necessarily mean accessible.

ANSWER: Show all results with the exception of entire databases, in which case show only those available to the subscriber. Include a "limit to available" option to see only what's available to that institution. Default to what's available at the institution, with an option to expand to what's available outside the institution.

15. The estimated agreement start date of July 1, 2016 – Does this mean that the solution should be cut over to production on this date? Or, is then when the implementation project should begin.

ANSWER: Assuming that “cutover to production” means the day we go live, then we want July 1, 2016 as our go live date. However, this is with the understanding that payment is not expected until after July 1, 2016.

16. Do all University of Maine System Universities and campuses use CAS for authentication? If not can you provide a list of what each university/campus uses for authentication?

ANSWER: Use of CAS varies from campus to campus at the moment. Currently, all user authentication for electronic resources is done via IP using proxy servers (EZProxy). However, since the campuses have some limited usage of CAS, we wanted to know about its potential should it be more widely used in the future.

17. What workflows or integrations are expected to be implemented between ARES, URSUS, MaineCat and Primo?

ANSWER: ARES integration would be any sort of federated searching of the reserves resources or the ability to link electronic reserves in ARES through the discovery portal. URSUS means the ILL ILS OPAC: this would include the ability to search bibliographic/item records from URSUS and to pass the searcher from one resource to the other. MaineCat is our statewide union catalog. Connecting to MaineCat might include passing a search on to the MaineCat catalog if it is unsuccessful.

18. 6.1.3.3 What percentage of content is mutually licensed? What is the approximate disciplinary format and date breakdown of the central index? and 6.1.4.5 What percentage of a university’s licensed content can be represented in the solution? In order to provide a full coverage analysis

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(the percentage of resources covered), we will need a full export of your electronic journal titles with identifiers.

ANSWER: Spreadsheets with the lists of electronic content (and source) for each campus can be found at : <https://drive.google.com/open?id=0B95lm5nppxC8TFIZazB3WEtXZTA>. This link should work for anyone. Includes both journals and ebooks. Please note that there is a large level of overlap between the institutions. Also, unlike many university systems, the majority of the electronic collection come from a statewide subscription (MARVEL!), not from the flagship campus.

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Modified - Appendix B - Cost Response Form

INSTRUCTIONS FOR – Exhibit 1 (Table 1) – Solution pricing.

The University needs to understand the associated lifecycle costs for your proposed system or service. For solution responses that leverage the University's existing hardware and software investments, the Respondent must provide which licenses and maintenance agreements the University needs to maintain. For solution responses that do not leverage the University's existing hardware and software investments, the Respondent must provide what additional equipment, licenses, and maintenance agreements we would need to purchase.

IMPORTANT - Respondents' are required to provide separate costs for each institution, as well as, pricing for enterprise licensing (all seven campuses).

Respondent's Organization Name – Provide the Respondent's Organization Name.

University Name – Institution name pertaining to the costs related to the solution.

Item Description - Provide a brief description of each item the University will need purchase or maintain in order to use your proposed system or service both during and after the period of performance period listed in this document.

Initial Cost – Provide any initial 'one-time' costs associated with the solution; i.e. original one-time license fee, training, implementation, etc.

Cost (Year 1 – 3) - All licensing and maintenance agreement pricing should include rates during the Agreement period, and anticipated future rates.

Extended Cost - Total for each line item including initial cost and all Year 1-3 costs.

Subtotal – Subtotal of the Extended Cost figures.

Less Discount – Discount offered off the Subtotal figure.

Total – Subtotal less Discount.

Exhibit 1 (Table 1) – Respondents will use this attachment to record all costs associated with this section. For a copy of the excel version of Exhibit 1, email the contact provided in **Section 1.6**.