

NEW HAMPSHIRE STATE LIBRARY

nhaisLOCAL – Report on Responses from the April 2012 RFI

Introduction

In April 2012 NH State Librarian Michael York sent letters to the 4 vendors we had previously identified as being able to support a local open source cataloging project for our state. Various parameters and information were provided to these vendors to allow them to understand what we are trying to do and give them a solid basis for providing pricing. (The information provided to the vendors follows this introduction).

We received responses from all of the vendors we contacted. They were (alphabetically):

ByWater Solutions (West Haven, CT)
Equinox Software, Inc. (Norcross, GA)
Fantail Consulting & Technologies (Ellicott City, MD)
LYRASIS (Atlanta, GA)

Each of the questions we asked is listed below with the answers provided by the vendors. The answers to each question are listed in alphabetical order by vendor name. The complete responses from each vendor are attached at the end of this report

A summary of pricing and some examples of possible first year costs follow the questions and answers.

The introductory info that was included in the April 2012 letter sent to each vendor

"The New Hampshire State Library is looking at the possibility of setting up a library cooperative to implement an open source automation solution for public, school, and special libraries in our state. The libraries that would be part of this automation cooperative, which we are calling nhaisLOCAL, would each have their own local system with local control of patron, circulation, and bibliographic records. We envision these local systems being created from a single template, or perhaps a couple of templates depending on library type (elementary school, public, etc.) so that the libraries can share expertise and functional system elements, like reports, among all the cooperative members. We also envision the systems being remotely hosted and supported as a group, which we hope will keep the price of the system lower than it would be if each library were to contract for support of a local system separately. We do not want to create a union catalog with shared borrowing or interlibrary searching in this system. That system already exists in New Hampshire and we don't see this project being a replacement for our current union catalog and automated interlibrary loan system. (<http://nhu-pac.nh.gov>).

I am interested in hearing from your company about whether you could implement and support such a project for the nhaisLOCAL libraries and what the costs of that would be. I have outlined a series of specific items for which I would like to get pricing and information about how they might be implemented. If you are interested in working with us on this project please respond to these questions in writing by April 15, 2012. Please send responses, either by email or as a printed document to Mary Russell, Librarian, NHAIS Services, 20 Park Street, Concord, NH 03301. Any questions about this project should be directed to Mary as well. She can be reached by email at mary.russell@dcr.nh.gov or by phone at 603-271-2866.

Please Note: This request is not a technical proposal. This Request is NOT to be considered as a binding Request for Proposal. The purpose of this request is for informational purposes only. The purpose of this Request is for the New Hampshire State Library to seek cost estimates before proceeding with any further bidding process. There will be no successful vendor chosen in this RFI process nor will there be a contractual arrangement as a result of the RFI. Submission of cost information will not be accepted or rejected.

Here are the anticipated parameters on which you should base your pricing:

- The number of libraries that would be part of nhaisLOCAL is expected to be about 70 maximum. The initial group that will implement the system will be much smaller (5-10) and additional libraries will come on board over several years. If the system works well and the pricing is affordable the group might eventually grow much larger than that.
- Each library has a core set of bibliographic records which are OCLC MARC records and can be extracted by NHSL staff from our union catalog. These records do not include local barcodes and may not include local call numbers (some do, some don't) The collection sizes of the libraries range from as few as 6,000 bibliographic items to as many as 130,000. Most are in the 15,000-30,000 item range. The approximate number of unique bibliographic records for the entire group of 70 libraries is 507,000. There are 1,371,400 individual items attached to these records for the libraries in the nhaisLOCAL group. (holdings as of 3/19/2012)
- Local barcode information, circulation and patron records for each library, and additional bibliographic records in some cases will come from a variety of automation systems currently in place in the nhaisLOCAL libraries.
- The local system for each library will be functionally separate from the others. One library must not be able to see or change the patron and circulation information of any other library in the group.
- The system needs to be implemented with all of the state-of-the-art functionality of a local library automation system.

The system will be hosted by your company (or a subcontractor) and no local servers will be maintained by the NH State Library or the nhaisLOCAL members."

1. Which software would you set us up on? Koha Evergreen

Other: _____

ByWater

ByWater Solutions proposes the implementation of the open source community version of the Koha ILS as found on www.koha-community.org

Equinox

NOTE: Equinox proposed that they could support either an Evergreen or a koha solution on a 'subscription' payment schedule. They began their response with a page on how they would arrange the contract and payments for their services. (The full response from each vendor is included as appendices to this report.) Their response was structured in 2 parts, one for evergreen and one for koha. I have included both responses in each section of this report with a heading above the section to indicate which software section the response comes from.

1. Evergreen installation

Equinox is proposing an Evergreen installation for the nhaisLOCAL cooperative based on some of the inherent strengths of the design and architecture of the software that may be leveraged to encourage greater sharing among the partnering libraries.

Evergreen was initially designed for a statewide, shared library consortium in the state of Georgia. From concept to design, Evergreen was constructed for scaling the system as necessary to account for growth and granular to allow local library policies to be established in a shared system. Since the initial implementation, Evergreen has been implemented at a number of other statewide and multi-type library consortia based on its inherent flexibility.

The New Hampshire State Library has specifically requested a proposal that is not a union catalog solution. Equinox acknowledges and understands this request. The Evergreen solution is a shared catalog but does not need to serve as a replacement of the existing statewide ILL system. Evergreen policies allow for the shared system to be implemented without including circulation resource sharing.

The strengths that we see with the Evergreen approach to this project are listed:

- o Even in a shared system, Evergreen can allow for each member library to have their own OPAC branding.
- o There is a single, centralized administrative interface for local administrators to maintain the cooperative policies.

Question 1, Page 2

- Equinox policies are created in a hierarchical structure, allowing for shared policies to be inherited down across the cooperative.
- Evergreen would be able to support inter-local lending agreements, if required, through Evergreen policies.
- A shared bibliographic database may improve the overall quality of records.
- Evergreen allows for segmented views, edits, creation, and deletes for all functional areas of the application.
- Evergreen would allow an easy mechanism for sharing report templates among member libraries.
- The New Hampshire State Library would be able to run centralized reports for the partner libraries.
- Evergreen could support local or centralized subscriptions to 3rd party vendors.

The negatives of the shared Evergreen installation are listed

- The request stipulates that the solution not be a union catalog
- Some development would be required to fully segment views for patron records between partner libraries.
- The data migration would include strongly recommended bibliographic de-duplication services following each partner library implementation wave.

1. Koha Installation

Equinox is proposing a Koha installation in which each partner library will have their own Koha installation and database. Equinox will install the libraries with a 'standard' set of configuration options that are determined for the cooperative and may be based on the library type (i.e. public, academic, school, special). The proposed pricing will mandate that partner libraries are all running the same version of Koha. The nhaisLOCAL partner libraries will be upgraded in unison or on the same time schedule. For the proposed costs, customizations (or localizations) will be limited to those that are applicable from the standard Koha policies and tools.

The strengths that we see with the Koha approach to this project are listed:

- Partnering libraries will control a unique Koha database
- Policies will be controlled from a local library level

- The New Hampshire State Library and partner libraries will be able to continue interfacing with the state supported union catalog as is currently established
- No additional development is required to implement the ILS as proposed

The negatives that we see with the Koha approach to this project are listed:

- Local policy maintenance will be de-centralized
- Reports will be de-centralized
- Inter-local agreement for resource sharing will be controlled through a separate system

Fantail

NOTE: Fantail included in their response "for reference at the end of this document, a presentation of a project implemented for British Library that is similar in complexity and size." (The full response from each vendor is included as appendices to this report.)

1. Which software: We will use Koha to build the solution.

LYRASIS

1. Which software would you set us up on? Koha Evergreen Other: _____

LYRASIS proposes the Evergreen ILS. Prices stated in this reply to the request-for-information are approximate and non-binding. Specific pricing will require knowledge of the nature of the libraries to be migrated, the services – particularly database migration activities – needed in the course of the migration, and operational efficiencies that can be gained by shared setup, training, and hosting.

As an organization similar to NHAIS, we are quite conscious of the sensitivity of libraries to price increases, and we walk that fine line in balancing that sensitivity with actual cost increases. We have priced this service in the context of our overall pricing expectations and needs and expect that prices if increased annually will increase annually modestly. Being precise is difficult since some of our costs are not internally controlled.

There is always the possibility that somehow our mutual expectations of your needs and our price to meet those are inaccurate or change. In that case should any major adjustment be needed to maintain our partnership, we would first talk with NHAIS and its members, and agree on a mutually acceptable approach.

2. Cost of software install and customization for the first year: \$ _____
Please indicate the turnaround time for this and if it is based on a per-library amount, or a minimum number of libraries at once, or a flat-rate for the group (or whatever it is based on).

ByWater

2. Cost of software installation and customization for the first year: \$ 22,000.00
Please indicate the turnaround time for this and what this pricing is based on:

Costs associated with the implementation and customization of Koha for the nhaisLOCAL catalog are listed on "Attachment A" of this RFI. ByWater Solutions has experience in the gradual addition of libraries over a multi-year time period through our partnership with the Vermont Organization of Koha Automated Libraries (VOKAL). If we were given a batch of initial libraries to migrate into the nhaisLOCAL catalog, turnaround time would be roughly six months.

The pricing listed on "Attachment A" is based on the total number of libraries given in the anticipated parameters section of the RFI. ByWater Solutions would need to build the initial system architecture and customize the Koha database so as to enable the smooth addition of future libraries. Because of the preparation work needed, the Installation and Customization fee would be due at the beginning of the project.

Equinox

EVERGREEN

2. Cost of software install and customization for the first year?

Please indicate the turnaround time for this and if it is based on a per-library, or a minimum number of libraries at once, or a flat-rate for the group.

Equinox will install the latest stable, community-supported version of the Open-ILS at the Equinox data center located at Quality Technology Services (QTS) in Suwanee, GA. Equinox will provision the hardware and network capacity to meet the needs for your library throughout the relationship between Equinox and the library.

There would be an initial installation cost for the Koha 'cluster' that would be applied as a one-time cost for the consortium. The proposed cost for the Cluster is based on the projected size of nhaisLOCAL (70 libraries and <600,000 bibliographic records.

- o Master Agreement Cost (one-time cost) – \$52,000.00 and an annual base cost of \$3,500.00.

The installation cost for each member library would be applied as part of the proposed subscription cost as the libraries join the nhaisLOCAL project. The subscription cost is presented in our response to question 2.4.

KOHA

2. *Cost of software install and customization for the first year?*

Please indicate the turnaround time for this and if it is based on a per-library, or a minimum number of libraries at once, or a flat-rate for the group.

Equinox will install the latest stable, community-supported version of the Open-ILS at the Equinox data center located at Quality Technology Services (QTS) in Suwanee, GA. Equinox will provision the hardware and network capacity to meet the needs for your library throughout the relationship between Equinox and the library.

There would be an initial installation cost for the Koha 'cluster' that would be applied as a one-time cost for the consortium. The proposed cost for the Cluster is based on the projected size of nhaisLOCAL (70 libraries and <600,000 bibliographic records.

- o Master Agreement Cost (one-time cost) – \$40,000.00 and an annual base cost of \$3,500.00.

The installation cost for each member library would be applied as part of the proposed subscription cost as the libraries join the nhaisLOCAL cooperative. The subscription cost is presented in 3.4.

Fantail

2. Install and customization (app configuration): \$ 900 per library.

LYRASIS

2. *Cost of software install and customization for the first year: \$ _____*

Please indicate the turnaround time for this and if it is based on a per-library amount, or a minimum number of libraries at once, or a flat-rate for the group (or whatever it is based on).

For independent, per-library instances of Evergreen, the cost for the software install and customization varies by the size of the library, and ranges from \$2,500 to \$3,500. To the extent that templates can be created for types of libraries, this per-library installation and customization cost can be reduced slightly. In general, libraries can be running an Evergreen instance in production in as little as 12 weeks, but timing is dependent on factors such as the number of simultaneous libraries being installed, the effort required to extract-transform-load records from the old ILS to the Evergreen system, and the scheduling requirements of local libraries.

Yearly application support costs (year two and beyond) are approximately \$500 to \$1,500 per library and do not vary by the number of libraries in the program.

3. Cost (per record) for data loading: \$ _____
Please explain what is (or is not) included in this cost.

ByWater

3. Cost (per record) for data loading: \$.08 .
Please explain what is included in this cost:

The cost per bibliographic record for data loading can also be found on "Attachment A" of this document. This cost covers all data that would need to be loaded into the new catalog including but not limited to: patron, circulation, holds, financial, serials, and acquisitions data. ByWater would price the cost per library based on the number of records held prior to migration into the system. We believe that every library will want and need all legacy data migrated into any new system and as a result we include all data in our "per record" cost.

Equinox

EVERGREEN

3. *Cost (per record) for data loading:*

Please explain what is (or is not) included in the cost

Data migration includes two parts: data extraction from the legacy ILS of the member library and the migration of that data to their Koha database. The data extraction service is optional and will not be applied in the event that the member library is able to provide Equinox with data from their legacy ILS. The data extraction is also only eligible for libraries that can grant Equinox Implementation Staff access to the legacy ILS server.

- o Data Extraction Service Flat Rate (one-time cost)- \$1,400.00/data source

All data migration projects include an Equinox project manager, a minimum of one (1) test data load, and a production data load. Equinox proposes the following costs for data migrations, by data type, for the data migration. All data migration costs will be applied as a one-time cost.

- o Bibliographic/Item/Authority Records = \$.09/bibliographic record (minimum of \$1,000 per load)
- o Patron Records = provided at no additional cost
- o Circulation Loan Records = \$1,000.00/data source
- o Circulation Fee Records = \$1,000.00/data source
- o Circulation Hold Records = \$1,000.00/data source

Question 3, Page 2

Equinox is able to provide additional data migration services for Acquisitions and Serials data. Pricing for this data type will be presented upon request.

In a shared system, Bibliographic Deduplication would be required following each member migration group joins the union catalog.

- Bibliographic Deduplication = \$1,400.00/run

KOHA

3. *Cost (per record) for data loading:*

Please explain what is (or is not) included in the cost

Data migration includes two parts: data extraction from the legacy ILS of the member library and the migration of that data to their Koha database. The data extraction service is optional and will not be applied in the event that the member library is able to provide Equinox with data from their legacy ILS. The data extraction is also only eligible for libraries that can grant Equinox Implementation Staff access to the legacy ILS server.

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- Circulation Hold Records = \$1,000.00/data source

Equinox is able to provide additional data migration services for Acquisitions and Serials data. Pricing for this data type will be presented upon request.

In addition, Equinox may provide data cleanup services (i.e. bibliographic deduplication). Pricing for data cleanup services will be presented upon request.

Fantail

3. Cost per record for data loading: \$0.04 per item record. This will include massaging/transforming items data to fit Koha, deduplication, merging of records will be included. Nothing excluded. However, manual correction of data is not included.

LYRISIS

3. Cost (per record) for data loading: \$ _____

Please explain what is (or is not) included in this cost.

To determine precise migration costs we would need to work with each library to understand the system where the records are coming from and the requirements to put the records in a form for loading into Evergreen. The migration of data is broadly a three-step process – extraction, transformation, and loading – and costs vary at each of these stages. The costs for extracting information from an existing ILS installation vary depending on the capabilities and data structures of that library's existing automation system. Transformation includes manipulation of the records into the format required for Evergreen. Loading, the most minimal aspect of pricing the migration of data, involves inserting records to the library's new Evergreen installation. We would work with each of the member libraries to tailor these three steps to the library's need and price it based on the actual costs of performing the work. Migration of bibliographic, holdings, and patron records could range from \$2.50 to \$6 per 100 records. This cost does not include authority control or other manipulation of the records beyond what is required to load the records into Evergreen.

4. Annual cost of hosting our system: \$ _____

If this cost will vary between the first and subsequent years, or change based on participation levels, please explain how that breakdown will work. Also, what specific services are included in hosting?

ByWater

4. Cost of hosting our system: (TOTAL) \$ 21,000.00

If this cost will vary between the first and subsequent years, or change based on participation levels please explain how that breakdown will work. Also what specific services are included in hosting?

The price listed above can also be found listed on "Attachment B" of this document. Pricing is based on the maximum number of member libraries as listed in the RFI. Because ByWater would be building a clustered system that will have the ability to take multiple additions rather quickly without effecting performance, much of this fee would be required at the beginning of our agreement. That said, ByWater is open to discussion regarding this topic.

ByWater Solutions hosts with the third party hosting provider Rackspace (www.rackspace.com).

ByWater would propose a cluster environment, with a separate load balancer routing traffic to one or more Koha servers, which in turn access one or more separate database servers. This provides a high degree of resource distribution and redundancy to handle spikes in system use. With a cluster design, batch operations can be distributed amongst multiple servers, ensuring that no one server becomes unable to process the operation. If needed, multiple synchronized database servers can be used to distribute the database transaction load. This has the added advantage of allowing large reports to be run against a mirror database where they will not interfere with normal operations. Another advantage to the cluster design is that it is relatively easy to add additional servers to carry the load if the system is not performing at acceptable levels.

ByWater Solutions plans and prepares for the worst by taking the following precautions and installing the following safeguards to protect your data.

We perform a daily backup of all system data stored on the cloud. This information is saved both on-site and off-site, and is comprised of the all of the system data, and all other information found on the main server.

In addition to the daily backups listed above, we create a mirrored image of the system data and code-base on our servers located at the ByWater main office in California. In the event that the entire cloud fails, we can have your system up and running within a matter of hours.

If you so choose, we can also set up an additional system backup onsite at your library's location and populate that daily. Your library will be responsible for the procurement of all necessary hardware, but we are happy to make recommendations regarding your needs. We will also monitor both ends of the process to assure that we are meeting the backup requirements. – Providing full resources for the Client to rebuild as necessary

Updates and upgrades to your Koha system are covered under our annual support fees.

Equinox

EVERGREEN

4. *Annual cost of hosting our system:*

If this cost will vary between the first and subsequent years, or change based on participation levels, please explain how that breakdown will work. Also, what specific services are included in hosting.

The Equinox subscription service includes:

- Extending the hosting environment to support the nhaisLOCAL cooperative.
- Configuration of the Evergreen environment for the partner library
- Local policy configuration and OPAC branding
- Extending support for the partner library
- Project management for the partner product

The subscription costs will be added as libraries join the system. The base subscription rate will be applied on a scale based on the size of the partner library. The first year cost will be prorated to the annual renewal date as established in the Master Agreement then applied fully at the renewal date for subsequent subscription years.

Subscription Rate Scale for joining libraries:

- 0-10K Bibliographic Records = \$500.00 annually
- 10K-25K Bibliographic Records = \$1,000.00 annually
- 25K-50K Bibliographic Records = \$1,500.00 annually
- 50K-75K Bibliographic Records = \$2,000.00 annually
- 75K-100K Bibliographic Records = \$2,500.00 annually
- 100K-125K Bibliographic Records = \$3,000.00 annually
- \$125K-150K Bibliographic Records = \$3,500.00 annually

KOHA

4. Annual cost of hosting our system:

If this cost will vary between the first and subsequent years, or change based on participation levels, please explain how that breakdown will work. Also, what specific services are included in hosting?

The Equinox subscription service includes:

- Extending the hosting environment to support the nhaisLOCAL cooperative.
- Configuration of the Koha environment for the partner library
- Local policy configuration and OPAC branding
- Extending support for the partner library
- Project management for the partner product

The subscription costs will be added as libraries join the system. The base subscription rate will be applied on a scale based on the size of the partner library. The first year cost will be prorated to the annual renewal date as established in the Master Agreement then applied fully at the renewal date for subsequent subscription years.

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Subscription Rate Scale:

- 0-10K Bibliographic Records = \$500.00 annually
- 10K-25K Bibliographic Records = \$1,000.00 annually
- 25K-50K Bibliographic Records = \$1,500.00 annually
- 50K-75K Bibliographic Records = \$2,000.00 annually
- 75K-100K Bibliographic Records = \$2,500.00 annually
- 100K-125K Bibliographic Records = \$3,000.00 annually
- \$125K-150K Bibliographic Records = \$3,500.00 annually

Fantail

4. Annual hosting cost: \$ 1,000 per library. This will come with 24*7 support. We have the strongest SLA's in the industry. We do not make a distinction between first and subsequent years of hosting. With more participation will most certainly bring in some economies of scale. Hosting includes software patches, security patches, and everything required to provide you with a usable system.

LYRISIS

4. Annual cost of hosting our system: \$_____

If this cost will vary between the first and subsequent years, or change based on participation levels, please explain how that breakdown will work. Also, what specific services are included in hosting?

Annual hosting cost is ranges from \$3,000 to \$6,000 per year for the sizes of libraries described in your memo.

5. Will any development be needed to implement our system? If so, please explain what will be needed and how much it will cost. Please indicate if this work is something your company would do, or if it would be contracted to someone else?

ByWater

5. Will any development be needed to implement our system? If so, please explain what will be needed and how much it will cost. Please indicate if this work is something your company would do or if it would be contracted to someone else?

In order to accommodate the NH State Library's request for independent control over patron, circulation, and bibliographic functions, ByWater Solutions will take part in and fully manage a custom development project. The functionality will mask all information not local to the given library accessing the catalog from a given location. The proposed development will also allow for "Administrative" login credentials which will allow the catalog's staff side to be viewed as a single catalog for support and management functions if desired. ByWater Solutions partners with Catalyst IT of Wellington NZ on development projects. Although ByWater will be partnering with Catalyst for aspects of this development, ByWater will manage and be accountable for the

entire development as well as be the contact with the NH State Library during the development process. Catalyst's Koha development staff credentials are listed below.

The functionality of the proposed development would allow for local control of patron, circulation, and item information in the catalog. ByWater proposes that the bibliographic information remain in the catalog as a shared record, and for the individual item records to be the controllable element in the catalog. Koha's item information may contain notes and tags so as to allow for customization of the record without compromising the bibliographic record itself. Not utilizing the item record for this purpose would result in multiple duplicate bibliographic records as well as a much higher (double) cost to the development itself, as the searching functionality of Koha would need to be altered as well. The cost for the proposed development listed above would be roughly \$35,000.00.

Catalyst IT:

Chris Cormack, Lead Developer, one of the first Koha developers and continues to be actively engaged with the worldwide Koha community. He received his BA in MāStudies and Mathematics as well as his B.Sc. in Computer Science from Massey University in New Zealand, is a strong and effective advocate for Koha and takes part in the regular KohaCon conferences, as well as providing ongoing support for a number of Koha clients. Chris has been named Koha Author of the Year three times and Koha Author of the Month twenty-seven times since October 1999. Chris was chosen as Release Manager for the Koha 3.4 development which was released in April 2011. Chris was named Open Source Contributor of 2007 at the New Zealand Open Source Awards. He was an honorary speaker at Linux Conference Australia in 2006. He received the Computerworld Excellence Awards in 2004 for excellence in the field of Information Technology. He received the TUANZ Interactive Award in the Community/Not for Profit category in 2000. He also received the 3M Award for Innovation in Libraries in 2000.

Robin Sheat, Developer, earned his MS in Computer Science from the University of Otago. Robin joined Catalyst as Perl, Javascript, and Java developer in 2009 and has since then worked on Stuff.co.nz, New Zealand's biggest and most prominent online news web site, and Koha. He is a developer for Koha as well as package maintainer for Koha, including Catalyst's MyKoha service (<http://mykoha.co.nz>). In his spare time, Robin is the primary developer for an open source Java-based desktop application.

Srdjan Jankovic, Senior Developer, holds a Bachelor in Electrical Engineering (Honors) from the University of Belgrade, Yugoslavia, and is an experienced developer in Perl, the programming language of Koha and has contributed code to Koha since early 2010. Srdjan has worked as Senior Developer with McCarthy & Associates (1995-1996) and CPS Systems (1996-2000) prior to joining Catalyst IT.

Equinox

EVERGREEN

5. Will any development be needed to implement our system? If so, please explain what will be needed and how much it will cost. Please indicate if this work is something your company would do, or if it would be contracted to someone else?

Evergreen was designed for consortia allowing for libraries to share a union catalog but to allow for local policy control, and controlled access to member libraries locally-owned records. However, some additional development would be required to fully complete protected views of patron and circulation data limiting them to a single library.

Equinox would propose to provide the development of this enhanced scoping using Equinox staff. Costs will be presented upon a further discussion of the scope of the development project.

KOHA

5. Will any development be needed to implement our system? If so, please explain what will be needed and how much it will cost. Please indicate if this work is something your company would do, or if it would be contracted to someone else?

For the proposed Koha implementation, no additional development would be required.

Fantail

5. Development: At this time we do not know if you would require any custom development. In our experience, you may not require any development, but it would be prudent to allow a budget of about \$30,000. We do all development in house at a competitive rate of \$20 per hour for developers and \$100 per hour for project management done from here. Project management effort is typically around 10% of the developer effort.

LYRASIS

5. Will any development be needed to implement our system? If so, please explain what will be needed and how much it will cost. Please indicate if this work is something your company would do, or if it would be contracted to someone else?

Evergreen can often be implemented without additional software development; this can be impacted, however, by circumstances specific to the library(ies) being migrated. The migration of each library is based on its needs and timeline. Data migration, cleanup and training may be necessary before full implementation. Within the first few weeks of your decision to migrate to LYRASIS' hosted Evergreen service, we will meet to assess and propose specific migration timelines with goals and needs. If, in the course of determining the goals and needs we find that software development is required, we will work with you and your member libraries to draw up specifications for that development. Our staff will do software development.

6. There are two different support scenarios we are considering and we would like pricing information on each.

#1 – Your company will provide all support for set up and ongoing use of the system to all staff of all libraries in nhaisLOCAL. Please explain what support would be available and what it would cost on an annual basis for the entire group. If this is priced per library, please indicate that.

#2 – Staff here at the NH State Library would provide first level phone support for nhaisLOCAL libraries and your company would provide support to our staff (or to the staff from participating libraries whom we refer to you) for issues we cannot resolve. Please explain what support would be available and what it would cost on an annual basis for the entire group. If this is priced per library, please indicate that.

#3 – Is there another support model that you would suggest? If so, please describe it and outline the relevant costs.

ByWater

6. There are two different support scenarios we are considering and we would like pricing information for both:

- (1) Your company will provide all support for setup and ongoing use of the system to all staff of all libraries in nhaisLOCAL. Please explain what support would be available and what it would cost on an annual basis for the entire group. If priced per library please indicate that.

If the nhaisLOCAL opted to utilize ByWater's support system for all libraries and library staff within the system, ByWater would make available all methods of support including 24/7 phone support, the ByWater ticketing system, live chat, training refreshers, and updates and upgrades to the Koha database on a monthly basis. ByWater's full support offering can be viewed on "Attachment C" of this document. This scenario would be much more costly for nhaisLOCAL because of the amount of time which would be needed to support each individual library separately. The cost for this scenario would be *\$65,000.00 per year for up to 70 libraries*. This translates to roughly *\$928.00 per site* which is a substantial discount from our price of *\$2,200.00 per site* for libraries with 50,000 bib records or less. In this scenario each member library would have their own login information for the ByWater support portal. The price listed above can also be found listed on "Attachment B" of this document.

Question 6, Page 2

- (2) Staff at the NH State library would provide first level phone support for nhaisLOCAL libraries and ByWater would provide support to our staff (or the staff from participating libraries we would refer to you) for issues we cannot resolve. Please explain what support would be available and what it would cost on an annual basis for the entire group. If priced per library please indicate that.

If the nhaisLOCAL opted to utilize ByWater's support system as a second tier support interface to be accessed after the issue is channeled through nhaisLOCAL staff, ByWater would make available all methods of support, including 24/7 phone support, the ByWater ticketing system, live chat, training refreshers, and updates and upgrades to the Koha database on a monthly basis. This scenario would allow for up to 5 users within the ticketing system and would be much less expensive than ByWater fielding all member support issues directly. The cost for this scenario would be \$21,000.00 per year for up to 70 libraries. This translates to roughly \$300.00 *per site* which is a substantial discount from our price of \$2,200.00 per site for libraries with 50,000 bib records or less. The price listed above can also be found listed on "Attachment B" of this document.

Support is the most important aspect of the services we provide to our partner libraries. We strongly believe that the proper support relationship can make all the difference when utilizing an open source solution, and allows you to take full advantage of all that Koha has to offer. The support you receive for your money is far more than a proprietary solution offers, and you get it for a fraction of the cost. Because of the lack of vendor lock in, support is what open source vendors like ByWater are judged based on. That said, ByWater Solutions has been ranked in the top 3 support companies in the country for satisfaction in support for public libraries for the last two years on Marshall Breedings annual Perceptions Survey on Automation.

Equinox

EVERGREEN

6. There are two different support scenarios we are considering and we would like pricing information on each.

#1 – your company will provide all support for set up and ongoing use of the system to all staff of all libraries in nhaisLOCAL. Please explain what support would be available and what it would cost on an annual basis for the entire group. If this is priced per library, please indicate that.

In a shared Evergreen installation, option #1 would not be supported.

#2 – Staff here at the NH State Library would provide first level phone support for nhaisLOCAL libraries and your company would provide support to our staff (or to the staff participating libraries whom we refer to you) for issues we cannot resolve. Please explain what support would be available and what it would cost on an annual basis for the entire group. If this is priced per library, please indicate that.

If nhaisLOCAL staff were to provide Tier 1 support for the nhaisLOCAL partner libraries, there would be no additional cost than as proposed in the subscription costs established in the Master Agreement in 2.2 and the Subscription Cost in 2.4.

#3 – Is there another support model that you would suggest? If so, please describe it and outline the relevant costs.

No additional support models are recommended.

KOHA

6. There are two different support scenarios we are considering and we would like pricing information on each.

The proposed Koha installation would assume that all Koha installations are running the same version of Koha, upgrade in unison, and that there are no 'local customizations' beyond the localization allowed under the standard Koha administration functions.

#1 – your company will provide all support for set up and ongoing use of the system to all staff of all libraries in nhaisLOCAL. Please explain what support would be available and what it would cost on an annual basis for the entire group. If this is priced per library, please indicate that.

For scenario #1, Equinox could provide support for each partner library. The cost would be an additional \$500.00/partner library above the subscription costs presented in 3.4.

#2 – Staff here at the NH State Library would provide first level phone support for nhaisLOCAL libraries and your company would provide support to our staff (or to the staff participating libraries whom we refer to you) for issues we cannot resolve. Please explain what support would be available and what it would cost on an annual basis for the entire group. If this is priced, per library, please indicate that.

If nhaisLOCAL staff were to provide Tier 1 support for the nhaisLOCAL partner libraries, there would be no additional cost than as proposed in the subscription costs presented in 3.4.

#3 – Is there another support model that you would suggest? If so, please describe it and outline the relevant costs.

No additional support models are recommended.

Fantail

6. Support costs:

Level 1 and Level 2 support: \$ 900 per library per month

Level 2 support: \$ 400 per library per month

Support would be available 24*7. Response time SLAs will be available for each severity level (e.g. Severity 1 – response within 4 hours). As in everything else, larger participation would result in economies of scale.

LYRASIS

6. There are two different support scenarios we are considering and we would like pricing information on each.

#1 - Your company will provide all support for set up and ongoing use of the system to all staff of all libraries in nhaisLOCAL. Please explain what support would be available and what it would cost on an annual basis for the entire group. If this is priced per library, please indicate that.

#2 - Staff here at the NH State Library would provide first level phone support for nhaisLOCAL libraries and your company would provide support to our staff (or to the staff from participating libraries whom we refer to you) for issues we cannot resolve. Please explain what support would be available and what it would cost on an annual basis for the entire group. If this is priced per library, please indicate that.

#3 - Is there another support model that you would suggest? If so, please describe it and outline the relevant costs.

Our annual costs described above presume the first scenario: LYRASIS will provide support for staff at nhaisLOCAL libraries. LYRASIS hosting clients have self-service access to 24/7 documentation support, asynchronous support via e-mail and web-based trouble ticket portal, and telephone support from 7am to 8pm Eastern Time. On call emergency support is available 24/7.

To the extent that NH State Library staff provide these functions, we will be able to reduce our annual application support costs.

We don't envision a possible third support model.

7. Depending on which support scenario we decide to go with our training needs may be different as well. Please provide pricing on each of these options.

#1 – Your company will provide training for each individual library as it gets ready to implement the system. Please explain how this training would be done (online, in-person, etc.) and what it would cost.

#2 – Staff here at the NH State Library would train each library as it implements. Your company would train us on using the system and would help us to set up a training program to use with libraries. Please explain how this training would be done (online, in-person, etc.) and what it would cost.

#3 – Is there another training model that you would suggest? If so, please describe it and outline the relevant costs.

ByWater

7. Depending on which support scenario we decide to go with, our training needs may be different as well. Please provide pricing on each of these options.

- 1) ByWater would provide training for each individual library as it gets ready to implement the system. Please explain how this training would be done and what it would cost.

If ByWater were to train each individual library as the system came on, the price for onsite training would be \$3,600.00 for 3 days of onsite training per library. ByWater also offers webinar training for \$350.00 per module (there are 5 total). We tailor training schedules according to our library's needs in terms of what is covered on which day. Onsite training is done using a combination of hands on and lecture techniques. After a library has been trained onsite, webinar training refreshers are included as part of ByWater's support services. This would be the most expensive option for nhaisLOCAL, as each library would be charged \$3,600.00 for training.

- 2) Staff here at the NH State Library would train each library system as it implements. ByWater would train us on using the system and would help us set up a training program to use with libraries. Please explain how this training would be done and what it would cost.

If ByWater were to train the staff of nhaisLOCAL on the functionality of Koha, the cost would be \$3,600.00 for the initial 3 days of training. We would not suggest solely using webinar training in this scenario. We would use webinar training modules after the initial training free of charge so as to reinforce any training that was received. In addition, the NH State Library staff would most likely want to take advantage of multiple onsite training sessions spread out throughout the year. We tailor training schedules according to our library's needs in terms of what is covered on which day. Onsite training is done using a combination of hands on and lecture techniques. This would be the least expensive option for nhaisLOCAL as it would most likely require three 3 day training sessions for a total cost of \$10,800.00 over the course of one year.

Question 7, Page 2

- 3) Is there another training model that you would suggest? If so please describe and outline the relevant costs.

The training regimen as suggested by ByWater would be a combination of scenarios one and two. ByWater would train the nhaisLOCAL staff initially before the first go live's begin so that the first libraries on the system would be trained by nhaisLOCAL staff and also ByWater via webinar refreshers (at no cost). After the initial libraries go live, we would suggest another onsite training for the staff of nhaisLOCAL as listed in scenario two, however existing libraries as well as libraries scheduled to go live next would also attend this three day session. This would allow for a reinforcement to the nhaisLOCAL staff, as well as for the libraries who have gone live, and an introduction for the upcoming go live libraries so as to make their training needs less intensive. This regimen could continue every 3 months until all libraries are live on the nhaisLOCAL system. This scenario would cost the same as that listed in scenario two, however it would result in more participation by member libraries and would result in less training related support issues and more knowledge of the system as a whole.

Equinox

EVERGREEN

7. Depending on which support scenario we decide to go with our training needs may be different as well. Please provide pricing on each of these options.

#1 – your company will provide training for each individual library as it gets ready to implement the system. Please explain how this training would be done (online, in-person, etc.) and what it would cost.

Scenario #1 – Equinox would provide training for each partner library either onsite or online. The cost would be based on the number of days required based on the functions that would be used at each library. Costs for training are provided at \$1,500.00 per day. The recommended class length for each class is presented. Each class would allow for up to 25 participants.

- Evergreen Introduction and OPAC – ½ day
- Circulation – 1 day
- Cataloging – ½ to 1 day
- Acquisitions – ½ day
- Serials – ½ day
- Reports and Administration – ½ day

Question 7, Page 3

#2 – Staff here at the NH State Library would train each library as it implements. Your company would train us on using the system and would help us to set up a training program to use with libraries. Please explain how this training would be done (online, in-person, etc.) and what it would cost.

Scenario #2 – Equinox staff would provide 'train the trainer' training to nhaisLOCAL staff onsite covering all modules of Evergreen. The training would be provided onsite over two (2) days at a rate of \$2,000.00/day plus travel for up to 25 participants.

#3 – Is there another training model that you would suggest? If so, please describe it and outline the relevant costs.

Scenario #3 – Equinox would propose a combination of both on-site nhaisLOCAL staff central training, online partner library training, and ongoing online training for Evergreen updates at the rates already provided in 2.7.1. We view the ongoing relationship being a partnership to continue keeping the partner libraries staff trained and informed of new developments that may influence their local workflows.

KOHA

7. Depending on which support scenario we decide to go with our training needs may be different as well. Please provide pricing on each of these options.

#1 – your company will provide training for each individual library as it gets ready to implement the system. Please explain how this training would be done (online, in-person, etc.) and what it would cost.

Scenario #1 – Equinox would provide training for each partner library online. The cost would be based on a 'per class' rate. Each class is provided by topic and is approximately 2 hours in length. The rate is \$250.00 per class for up to 5 participants. Additional participants may be included in the training at a cost of \$75.00 per participant.

- OPAC
- Circulation
- Cataloging
- Acquisitions
- Serials
- Reports
- Koha Tools
- Koha Administration

#2 – Staff here at the NH State Library would train each library as it implements. Your company would train us on using the system and would help us to set up a training program to use with libraries. Please explain how this training would be done (online, in-person, etc.) and what it would cost.

Scenario #2 – Equinox staff would provide 'train the trainer' training to nhaisLOCAL staff onsite covering all modules of Koha. The training would be provided on-site over two (2) days at a rate of \$2,000.00/day plus travel for up to 25 participants.

#3 – Is there another training model that you would suggest? If so, please describe it and outline the relevant costs.

Scenario #3 – Equinox would propose a combination of both on-site nhaisLOCAL staff central training, online partner library training, and ongoing online training for Koha updates at the rates already provided. We view the ongoing relationship being a partnership to continue keeping the partner libraries staff trained and informed of new developments that may influence their local workflows.

Fantail

7. Training:

Option 1: We can do online training for each library as it goes live: \$ 35 per hr. You will need to allow two to three days for training.

Option 2: We can do a combination of onsite followed by online training for ongoing training. Onsite training will require a per diem allowance plus travel costs in addition to the hourly rate.

LYRASIS

Our installation and customization costs described above presume the first scenario. We find that training works best in an online, webinar fashion. Attendees can use the Evergreen staff client installed on their own PCs to follow along with the exercises; we have found that it is sometimes problematic to get the Evergreen staff client installed in a training classroom setup. The webinars are also recorded for refresher training of staff and to show new staff joining a library.

One way to reduce costs is to utilize NH State Library staff to train nhaisLOCAL libraries as proposed in the second option. In this case, LYRASIS would train NH State Library staff via webinar using a training database supplied by LYRASIS. It may be a copy of one of the nhaisLOCAL member databases, or it may be an entirely fictitious database. NH State Library staff would have a similar ability to consult recordings of the webinar, and LYRASIS will make copies of the training materials available to the NH State Library staff for their use in training member libraries.

We don't envision a third possible training model.

8. If this project is implemented, we want each library to have it's own online public catalog that integrates the various databases and downloadable book resources that are available to our state's citizens through their public libraries and allows the library to include their local information (blogs, social media links, etc.) on their site. What additional costs or services will be needed to get us there?

ByWater

8. If this project is implemented, we want each library to have it's own online public catalog that integrates the various databases and downloadable book resources that are available to our State's citizens through their public libraries that allows the library to include their local information (blogs, social media etc) on their site. What additional costs or services will be needed to get us there?

ByWater Solutions would be able to provide each member library that is part of nhaisLOCAL with a static IP address which would contain a customized OPAC containing all of the enhanced content listed above. Each OPAC would only show information as it pertains to the library website being accessed via that custom URL. The price per library for individual OPAC customization would be \$800.00 per library. This pricing is also listed on "Attachment A" of this document. Libraries would be presented with 4 basic templates to choose from, which would then be customized with the library's logo, colors and enhanced content.

Equinox

EVERGREEN

8. If this project is implemented, we want each library to have its own online public catalog that integrates the various databases and downloadable book resources that are available to our state's citizens through their public libraries and allows the library to include their local information (blogs, social media links, etc.) on their site. What additional costs or services will be needed to get us there?

There are no additional costs than as has been presented for libraries to localize their Evergreen OPAC when using the available Evergreen-community supported CSS and locally developed templates.

KOHA

8. If this project is implemented, we want each library to have its own online public catalog that integrates the various databases and downloadable book resources that are available to our state's citizens through their public libraries and allows the library to include their local information (blogs, social media links, etc.) on their site. What additional costs or services will be needed to get us there?

There are no additional costs than as has been presented for libraries to localize their Koha OPAC when using the available Koha-community supported CSS and locally developed templates.

Fantail

8. Catalog/website for each library:

Koha's content mgmt capabilities are not great, so we propose to use Drupal to provide a website for each library. Drupal has rich capabilities for content management, blogs and social media. It will include a catalog site for each library as well (single Koha, multi-opac)

Costs per library: \$ 500 per which will include the initial setup, and ongoing software maintenance. This includes just the basic styling of the website and OPAC. If you need a high end website rich in social media, presence, traffic and a multitude of features, the site could cost anywhere from \$5,000 to \$10,000 or even more. This might be warranted for one or two of your libraries

LYRASIS

8. If this project is implemented, we want each library to have it's own online public catalog that integrates the various databases and downloadable book resources that are available to our state's citizens through their public libraries and allows the library to include their local information (blogs, social media links, etc.) on their site. What additional costs or services will be needed to get us there?

There are several possibilities here, and the implementation details depend on a more defined set of criteria. For instance, LYRASIS offers a Discovery Service that integrates search results from commercial databases and free internet resources into a single search experience with the data from the Evergreen ILS. The LYRASIS Discovery Service pages are customizable by library, and can contain links to a library's existing blogs and social media services. Alternatively, an extension of this single search experience could be provided through Drupal, which would provide blogging and social media capabilities for the local library on the same screens that deliver search results from the Evergreen ILS and/or other various databases. Yet another option would replace the Evergreen OPAC interface with a WordPress installation that allow for both searching the Evergreen database and blogging capabilities for library staff.

We cannot provide specific pricing guidance because of the variability of options, and we would welcome the chance to meet with you to see what your needs are and what solutions can effectively match those needs.

9. What will the annual costs (separated out from implementation) be?

ByWater

9. What will the annual costs (separated our from implementation be?)

As listed on "Attachment B" of this document, the total cost for all 70 libraries to be hosted *and* supported by ByWater would be \$86,000.00 per year for scenario #1, and \$42,000.00 per year for scenario #2. Specific timelines for these charges to take effect would need to be determined once a migration plan was put in place. Hosting charges are a fixed cost as the server for the whole system will need to be allocated and created at the beginning of the project.

Equinox

EVERGREEN

9. What will the annual costs (separated out from implementation) be?

Equinox has proposed a subscription service where the annual costs will be based on the Master Agreement annual cost presented in 2.2 and the number of libraries participating according to the scale provided in 2.4.

KOHA

9. What will the annual costs (separated out from implementation) be?

Equinox has proposed a subscription service where the annual costs will be based on the Master Agreement annual cost presented in 3.2 and the number of libraries participating according to the scale provided in 3.4.

Fantail

9. All possible options have already been considered in the RFI, without compromising the quality of the end product. Open source software and hosting it in the cloud are two major cost factors. By choosing a team like Fantail-Nucsoft OSS Labs which brings you the benefits of local skilled presence as well as low cost resources for bulk work, you would be able to further lower your costs. Finally, engaging in a multi-year contract option has the potential to bring in some additional savings.

LYRISIS

9. What will the annual costs (separated out from implementation) be?

Annual costs are a combination of application support (question #2) and hosting (question #4). The total annual cost would be approximately \$3,500 to \$7,500 per library depending on the size of the library.

10. Are there options that we should consider that would bring down the costs of this project?

ByWater

10. Are there options we should consider that would bring the costs down on this project?

The best way to keep costs down on this project would be to bring in the first tier of support internally so as to lower annual support costs. In addition, using option #2 or #3 for training would result in substantial initial savings. By finding the development listed above, the nhaisLOCAL catalog would save a very large amount on annual hosting costs, as the system would be able to remain a single database instead of 70 separate servers. In addition, utilizing the item information on the bibliographic record as the local control variable will result in a much less expensive development cost for the catalog.

We truly believe that Koha is a perfect fit for the goals and needs of the nhaisLOCAL catalog project and we hope to have the chance to be a part of this fantastic service to New Hampshire libraries. Please consider me as a resource for your organization as your exploration into this possibility continues, and please understand that we are open to discussion on the specifics on any aspect of our pricing proposal. With our commitment to work with the New Hampshire State Library comes a great deal of flexibility on our end. Because of the valued relationships we have with our existing Koha libraries in your state, we hold the State of New Hampshire very close to our hearts and would be thrilled to have the opportunity to bring our services and acclaimed support to your libraries on a larger scale. Thank you again for the opportunity to submit our responses for your request for proposal and have a great day.

Equinox

EVERGREEN

10. Are there options that we should consider that would bring down the costs of this project?

The proposed subscription model has proven to be the most cost effective manner for deploying statewide systems according to Equinox's experience.

Training services may be a way to save costs over time if shared during implementation or over-time if nhaisLOCAL provides all or part of the training services.

KOHA

10. Are there options that we should consider that would bring down the costs of this project?

The proposed subscription model has proven to be the most cost effective manner for deploying statewide systems according to Equinox's experience.

Training services may be a way to save costs over time if shared during implementation or over-time if nhaisLOCAL provides all or part of the training services.

Fantail

NOTE: Fantail did not answer question 10

LYRASIS

10. Are there options that we should consider that would bring down the costs of this project?

We recommend the New Hampshire State Library and the NHAIS member libraries reconsider the decision to have separate installations for each library. Our costs increase dramatically when we consider the requirements to maintain separate systems for each library: copying report definitions, data backups, operating system patches, application upgrades, and general maintenance/monitoring activities. Even using virtualization technology (as we do) to reduce the number of physical servers, the number of virtualized servers is high as is the overhead associated with running this number of virtual servers. If we could change your architecture from 70 separate installations of Evergreen (and the resulting separate virtual servers) to one or a few shared instances, the economies of scale can dramatically drive down the annual hosting costs.

We recognize that New Hampshire librarians are strongly protective of their patrons' privacy, and there are technological means other than server isolation that we can use to meet this goal. In particular, the Georgia PINES consortium created Evergreen to solve the problem of independent libraries each running their own integrated library systems. Evergreen's system architecture provides for a flexible organizational hierarchy and a rich permissions system that can provide for local control of patron, circulation, and bibliographic records. We would welcome the opportunity to discuss this option with you to create the most economical system architecture that meets the desire for local autonomy and control.

nhaisLOCAL costs	Bywater - koha	Equinox - evergreen	Equinox - koha	Fantail - koha	LYRASIS - evergreen
Software & customization first year	\$22,000 (one-time server set up cost)	\$52,000 (one time set up cost)	43500 (one time set up cost)	\$63,000 (70 libraries @ \$900 each)	\$175,000 to \$245,000 (70 libraries @ \$2,500 to \$3,500 each)
Data extraction (if a clean data file can be provided this cost won't apply)	included	\$98,000 (70 data sources @ \$1,400 each)	\$98,000 (70 data sources @ \$1,400 each)	not addressed	will vary by library and will have to be custom quoted for each library
Data loading of 1,371,400 records (total # of bib holdings for 70 libraries)	\$109,712 (\$0.08 each)	\$123,426 (\$0.09 each)	\$123,426 (\$0.09 each)	\$54,856 (\$0.04 each)	range from \$34,285 to \$82,284 (custom pricing for each library)
BREAKOUT: Data loading of 19,590 records (avg # of bib holdings per library)	\$1,567.20 (\$0.08 each)	\$1,763.10 (\$0.09 each)	\$1,763.10 (\$0.09 each)	\$783.60 (\$0.04 each)	range from \$489.75 to \$1,175.40 (custom pricing for each library)
Additional loading costs	included	circulation loan records \$1,000 per data source; circulation fee records \$1,000 per data source; circulation hold records \$1,000 per data source; serials and acquisition data migration priced on request	circulation loan records \$1,000 per data source; circulation fee records \$1,000 per data source; circulation hold records \$1,000 per data source; serials and acquisition data migration priced on request		will vary by library and will have to be custom quoted for each library
bibliographic deduplication	included	\$96,600 (69 runs at \$1,400 each)	\$96,600 (69 runs at \$1,400 each)	included	
annual hosting (incl. 1st year)	\$21,000 (for up to 70 libraries)	approx. \$73,500 (base of \$3,500 + per library pricing based on bib record counts; assumed 70 libraries at 19,590 bibs each)	approx. \$73,500 (base of \$3,500 + per library pricing based on bib record counts; assumed 70 libraries at 19,590 bibs each)	\$70,000 (\$1,000 per library for 70 libraries)	range from \$210,000 to \$420,000 (for 70 libraries; prices vary \$3,000-\$6,000 per library based on size of each)
software development (initial)	approx. \$35,000 to accommodate request for independent control by each library over patron, circulation, and bibliographic functions	some additional development would be required to fully complete protected views of patron and circulation data, limiting them to a single library. Cost will be quoted upon further discussion of project	no additional development would be required	no needed development identified at this point, but recommend budgeting \$30,000 for development (in case)	might need developmetn depending on each libraries specific migration issues, would be priced based on developed specifications if need arose

nhaisLOCAL costs	Bywater - koha	Equinox - evergreen	Equinox - koha	Fantail - koha	LYRASIS - evergreen
annual ongoing support (all vendor)	\$65,000 (up to 70 libraries)	"would not be supported"	\$35,000 (70 libraries @ \$500 each)	\$756,000 (\$900/month for 70 libraries for 12 months)	included
annual ongoing support (NHSL staff doing 1st tier support)	\$21,000 (up to 70 libraries)	included	included	\$336,000 (\$400/month for 70 libraries for 12 months)	"would be able to reduce our annual application support costs" no \$ figures provided
user training (all vendor)	\$252,000 (onsite for 70 libraries at \$3,600 each)	\$72,000 (4 day sessions of training for 300 people -- 70 libraries with avg. 4 people each at \$3,600 per session)	\$120,000 (8 different classes for 5 people each @\$250 per class -- need training for 300 people -- 70 libraries with avg. 4 people each-- at \$2,000 per 5 people)	\$51,450 (70 libraries each get 3 7-hour days of training at \$735 per library)	training is included in first year set-up price
user training (NHSL does)	\$10,800 (2 different options for training the trainer model were offered at this price)	\$4,000 +TRAVEL (2-day train-the-trainer session for up to 25 people)	\$4,000 +TRAVEL (2 day train-the-trainer session for up to 25 people)	\$735 +TRAVEL (3-day training session with NHSL staff)	
individual web site setup to integrate opac w/online resources	\$56,000 (70 libraries at \$800 each)	available or local created templates included	available or local created templates included	\$35,000 (70 libraries at \$500 each to set up and integrate basic Drupal site)	various options suggested, pricing would be quoted per library based on criteria defined
TOTAL ongoing annual costs (all vendor supported)	\$1,228.57 per library (\$86,000 per year for 70 libraries)	"would not be supported"	approx. \$1,550 per library (approx. \$108,500 which is base + per library pricing; assumed 70 libraries at 19,590 bibs each + per library support)	\$11,800 per library (\$826,000 for 70 libraries)	range from \$3,000-\$6,000 per library depending on bib counts (\$210,000 to \$420,000 for 70 libraries)
TOTAL ongoing annual costs (NHSL staff supported)	\$600 per library (\$42,000 per year for 70 libraries)	approx. \$1,050 per library (approx. \$73,500 which is base + per library pricing; assumed 70 libraries at 19,590 bibs each)	approx. \$1,050 per library (approx. \$73,500 which is base + per library pricing; assumed 70 libraries at 19,590 bibs each)	\$5,800 per library (\$406,000 for 70 libraries)	would be "reduced" how much was not specified

Examples of Potential First Year Costs

Imaginary example libraries have been created based on composites of actual NH libraries that expressed interest in nhaisLOCAL and potential costs for first year implementation of a nhaisLOCAL system with the various vendors who responded to our RFI have been sketched out here based on the responses from the vendors. ***In each case it has been assumed that there are 70 libraries in the nhaisLOCAL co-operative and system infrastructure costs have been divided accordingly for these examples. If the actual number of participating libraries over the first few years of the project is fewer than that, then the distributed costs will be higher.***

BIRCH PUBLIC LIBRARY

This library has 682 registered borrowers and circulates 10,429 items per year. It has no local system or web site and has 19,840 items in its collection including 1,449 ebooks and 7,074 downloadable audios through the NH Downloadable consortium. NHU-PAC includes 15,160 records for this library including 6,627 holdings for it specifically and 8,523 records for downloadable consortium items. This leaves 4,680 items in Birch's collection apparently uncataloged. This difference may be accounted for, at least in part, by things the library holds multiple copies of.

Estimated potential first year costs with Bywater/koha (Birch Public)

\$ 800.00	server setup and software development (Birch's portion of overall cost)
\$ 300.00	first year hosting (Birch's portion of overall cost)
\$1,212.80	loading of 15,160 records from NHU-PAC
\$ 800.00	setup of a customized website integrated with the catalog and including database links
\$ 929.00	annual support cost for full vendor support (Birch's portion of overall cost)
<u>\$3,600.00</u>	training cost - done onsite by vendor
\$7,641.80	TOTAL

Estimated potential first year costs with Equinox/koha (Birch Public)

\$ 621.50	server setup and software development (Birch's portion of overall cost)
\$ 50.00	portion of base subscription price (Birch's portion of overall cost)
\$ 1,000.00	annual subscription rate for library with 10K-25K bibs
\$ 1,364.40	loading of 15,160 records from NHU-PAC
\$ 0.00	extraction fee should not apply to file of NHU-PAC records extracted by NHSL
\$ 500.00	annual support cost for full vendor support
<u>\$1,714.28</u>	training cost -- all classes taught by vendor
\$5,250.18	TOTAL

Estimated potential first year costs with Equinox/evergreen (Birch Public)

\$ 742.85	server setup and software development (Birch's portion of overall cost)
\$ 50.00	portion of base subscription price (Birch's portion of overall cost)
\$ 1,000.00	annual subscription rate for library with 10K-25K bibs
\$ 1,364.40	loading of 15,160 records from NHU-PAC
\$ 0.00	extraction fee should not apply to file of NHU-PAC records extracted by NHSL
\$??	full vendor support of system is not an available option, NHSL would have to find staff to provide 1 st tier support
<u>\$1,028.57</u>	training cost -- all classes taught by vendor
\$4,185.82	TOTAL

Estimated potential first year costs with Fantail/koha (Birch Public)

\$ 1,330.00	server setup and software development (Birch's portion of overall cost)
\$ 1,000.00	first year hosting
\$ 606.40	loading of 15,160 records from NHU-PAC
\$ 500.00	setup of a Drupal website integrated with the catalog and including database links
\$10,800.00	annual support cost for full vendor support
<u>\$ 735.00</u>	training cost-- done onsite at each library by vendor
\$14,971.40	TOTAL

Estimated potential first year costs with LYRASIS/evergreen (Birch Public)

These are very rough estimates as LYRASIS provided price ranges instead of firm figures for some questions.

\$ 2,500.00	server setup
\$ 3,000.00	first year hosting (training and support are included in hosting/set-up costs)
\$ ---	data extraction & loading costs will apply, but would be custom quoted for each library
\$ 379.00	loading of 15,160 records from NHU-PAC (assumes lowest load cost for OCLC records)
<u>\$ ---</u>	web site set-up cost would be custom quoted for each library
\$ 5,879.00+	TOTAL

LILAC PUBLIC LIBRARY

This library has 2,217 registered borrowers and circulates 42,143 items per year. It has an InfoCenter system currently in place with existing circulation records (patrons, holds, and fees) and no current serial or acquisitions data. Lilac Public has 37,419 items in its collection including 1,449 ebooks and 7,074 downloadable audios through the NH Downloadable consortium. NHU-PAC includes 28,141 records for this library including 19,618 holdings for it specifically and 8,523 records for downloadable consortium items. This leaves 9,278 items in Lilac's collection which are not in NHU-PAC, but for which there may be some sort of record in their InfoCenter system. This difference may be accounted for, at least in part, by things the library holds multiple copies of.

Estimated potential first year costs with Bywater/koha (Lilac Public)

\$ 800.00	server setup and software development (Lilac's portion of overall cost)
\$ 300.00	first year hosting (Lilac's portion of overall cost)
\$2,251.28	loading of 28,141 records from NHU-PAC
\$ 800.00	setup of a customized website integrated with the catalog and including database links
\$ 929.00	annual support cost for full vendor support (Lilac's portion of overall cost)
<u>\$3,600.00</u>	training cost - done onsite by vendor
\$8,680.28	TOTAL

Estimated potential first year costs with Equinox/koha (Lilac Public)

\$ 621.50	server setup and software development (Lilac's portion of overall cost)
\$ 50.00	portion of base subscription price (Lilac's portion of overall cost)
\$ 1,500.00	annual subscription rate for library with 25K-50K bibs
\$ 2,532.69	loading of 28,141 bib records from NHU-PAC
\$ 1,000.00	loading of circulation loan records from InfoCenter

\$ 1,000.00	loading of circulation fee records from InfoCenter
\$ 1,000.00	loading of circulation hold records from InfoCenter
\$ 0.00	extraction fee should not apply to file of NHU-PAC records extracted by NHSL
\$ 500.00	annual support cost for full vendor support
<u>\$1,714.28</u>	training cost -- all classes taught by vendor
\$9,918.47	TOTAL

Estimated potential first year costs with Equinox/evergreen (Lilac Public)

\$ 742.85	server setup and software development (Birch's portion of overall cost)
\$ 50.00	portion of base subscription price (Birch's portion of overall cost)
\$ 1,000.00	annual subscription rate for library with 10K-25K bibs
\$ 2,532.69	loading of 28,141 bib records from NHU-PAC
\$ 1,000.00	loading of circulation loan records from InfoCenter
\$ 1,000.00	loading of circulation fee records from InfoCenter
\$ 1,000.00	loading of circulation hold records from InfoCenter
\$ 0.00	extraction fee should not apply to file of NHU-PAC records extracted by NHSL
\$??	full vendor support of system is not an available option, NHSL would have to find staff to provide 1 st tier support
<u>\$1,028.57</u>	training cost -- all classes taught by vendor
\$8,354.11	TOTAL

Estimated potential first year costs with Fantail/koha (Lilac Public)

\$ 1,330.00	server setup and software development (Lilac's portion of overall cost)
\$ 1,000.00	first year hosting
\$ 1,125.64	loading of 28,141 bib records from NHU-PAC
\$ 500.00	setup of a Drupal website integrated with the catalog and including database links
\$10,800.00	annual support cost for full vendor support
<u>\$ 735.00</u>	training cost-- done onsite at each library by vendor
\$15,490.64	TOTAL

Estimated potential first year costs with LYRASIS/evergreen (Lilac Public)

These are very rough estimates as LYRASIS provided price ranges instead of firm figures for some questions.

\$ 3,000.00	server setup
\$ 4,000.00	first year hosting (training and support are included in hosting/set-up costs)
\$ ---	data extraction & loading costs will apply, but would be custom quoted for each library
\$ 703.53	loading of 28,141 bib records (assumes lowest load cost for OCLC records)
<u>\$ ---</u>	web site set-up cost would be custom quoted for each library
\$ 7,703.53+	TOTAL



ByWater
SOLUTIONS

Koha Implementation and Support

NEW HAMPSHIRE
STATE LIBRARY

nhaisLOCAL Catalog

 **koha**

FREE LIBRARY SYSTEM

<http://bywatersolutions.com>

Headquarters:

Santa Barbara, CA 93105

East Coast Offices:

West Haven, CT 06516

Phone-888-900-8944

sales@bywatersolutions.com

Introduction:

Today's ILS market is drastically changing; libraries worldwide are quickly learning that traditional software models that command large price tags and offer little in terms of support and flexibility are becoming things of the past. Adopting an open source ILS system not only lowers the price you pay for your software but more importantly it empowers your organization to take control of your technology and drive the direction of the ILS rather than merely act as a passenger. Finally you can have a voice regarding what features are added to your system and when you can take advantage of them. With absolutely no need for a tech savvy staff, you can take full advantage of the open source community's forward thinking and vibrant international member base who collaborate on developments for the good of all libraries using the system regardless of who their ILS vendor may be. ByWater Solutions believes in empowering libraries with the ability to control their own technology by making their experience user-friendly and professionally supported.

Koha is a full featured ILS developed by librarians for librarians. It is fully scalable and has been adopted by both small libraries and large consortia with library types ranging from school to academic to public to special. The Koha OPAC look and feel is extremely attractive and customizable, bringing the look of the e-commerce interface that the customer of today is used to navigating. Koha's OPAC also features functionality such as the text messaging over-dues, a virtual shelf browser and links to social media sites among many other things.

Koha is the ideal solution for the nhaisLOCAL catalog project. When looking at scalability of an ILS one must take into account the systems adaptability for smaller installations as well as the functional capabilities for larger systems. Koha, unlike many other systems, scales well for small as well as large libraries, giving it the capacity to manage consortia containing hundreds of member libraries while still being manageable and user friendly for libraries with fewer staff within that system. In addition, the development proposed in this RFI to accomplish the end goals of the nhaisLOCAL catalog will be extremely beneficial to the Koha project and the thousands of libraries worldwide who currently use it.

In summary, adopting an open source ILS such as Koha will not only be an enormous benefit financially and functionally, but will put you in the position to be a forerunner for libraries worldwide.

ByWater Solutions is thrilled to have the opportunity to reply to the RFI for the New Hampshire State Library's possible nhaisLOCAL catalog and we appreciate the opportunity to be involved in your exploration of possible ILS systems. We hope to have the chance to partner with the New Hampshire State Library and look forward to coming developments. Thank you very much for your consideration.

Very Best Regards,

Nathan Curulla
Owner, EVP

Questions:

1. Which software would you set us up on?

ByWater Solutions proposes the implementation of the open source community version of the Koha ILS as found on www.koha-community.org

2. Cost of software installation and customization for the first year: \$ 22,000.00

Please indicate the turnaround time for this and what this pricing is based on:

Costs associated with the implementation and customization of Koha for the nhaisLOCAL catalog are listed on "Attachment A" of this RFI. ByWater Solutions has experience in the gradual addition of libraries over a multi-year time period through our partnership with the Vermont Organization of Koha Automated Libraries (VOKAL). If we were given a batch of initial libraries to migrate into the nhaisLOCAL catalog, turnaround time would be roughly six months.

The pricing listed on "Attachment A" is based on the total number of libraries given in the anticipated parameters section of the RFI. ByWater Solutions would need to build the initial system architecture and customize the Koha database so as to enable the smooth addition of future libraries. Because of the preparation work needed, the Installation and Customization fee would be due at the beginning of the project.

3. Cost (per record) for data loading: \$.08 .

Please explain what is included in this cost:

The cost per bibliographic record for data loading can also be found on "Attachment A" of this document. This cost covers all data that would need to be loaded into the new catalog including but not limited to: patron, circulation, holds, financial, serials, and acquisitions data. ByWater would price the cost per library based on the number of records held prior to migration into the system. We believe that every library will want and need all legacy data migrated into any new system and as a result we include all data in our "per record" cost.

4. Cost of hosting our system: (TOTAL) \$ 21,000.00

If this cost will vary between the first and subsequent years, or change based on participation levels please explain how that breakdown will work. Also what specific services are included in hosting?

The price listed above can also be found listed on "Attachment B" of this document. Pricing is based on the maximum number of member libraries as listed in the RFI. Because ByWater would be building a clustered system that will have the ability to take multiple additions rather quickly without effecting performance, much of this fee would be required at the beginning of our agreement. That said, ByWater is open to discussion regarding this topic.

ByWater Solutions hosts with the third party hosting provider Rackspace (www.rackspace.com).

ByWater would propose a cluster environment, with a separate load balancer routing traffic to one or more Koha servers, which in turn access one or more separate database servers. This provides a high degree of resource distribution and redundancy to handle spikes in system use. With a cluster design, batch operations can be distributed amongst multiple servers, ensuring that no one server becomes unable to process the operation. If needed, multiple synchronized database servers can be used to distribute the database transaction load. This has the added advantage of allowing large reports to be run against a mirror database where they will not interfere with normal operations. Another advantage to the cluster design is that it is relatively easy to add additional servers to carry the load if the system is not performing at acceptable levels.

ByWater Solutions plans and prepares for the worst by taking the following precautions and installing the following safeguards to protect your data.

We perform a daily backup of all system data stored on the cloud. This information is saved both on-site and off-site, and is comprised of the all of the system data, and all other information found on the main server.

In addition to the daily backups listed above, we create a mirrored image of the system data and code-base on our servers located at the ByWater main office in California. In the event that the entire cloud fails, we can have your system up and running within a matter of hours.

If you so choose, we can also set up an additional system backup onsite at your library's location and populate that daily. Your library will be responsible for the procurement of all necessary hardware, but we are happy to make recommendations regarding your needs. We will also monitor both ends of the process to assure that we are meeting the backup requirements. – Providing full resources for the Client to rebuild as necessary

Updates and upgrades to your Koha system are covered under our annual support fees.

5. Will any development be needed to implement our system? If so, please explain what will be needed and how much it will cost. Please indicate if this work is something your company would do or if it would be contracted to someone else?

In order to accommodate the NH State Library's request for independent control over patron, circulation, and bibliographic functions, ByWater Solutions will take part in and fully manage a custom development project. The functionality will mask all information not local to the given library accessing the catalog from a given location. The proposed development will also allow for "Administrative" login credentials which will allow the catalog's staff side to be viewed as a single catalog for support and management functions if desired. ByWater Solutions partners with Catalyst IT of Wellington NZ on development projects. Although ByWater will be partnering with Catalyst for aspects of this development, ByWater will manage and be accountable for the

entire development as well as be the contact with the NH State Library during the development process. Catalyst's Koha development staff credentials are listed below.

The functionality of the proposed development would allow for local control of patron, circulation, and item information in the catalog. ByWater proposes that the bibliographic information remain in the catalog as a shared record, and for the individual item records to be the controllable element in the catalog. Koha's item information may contain notes and tags so as to allow for customization of the record without compromising the bibliographic record itself. Not utilizing the item record for this purpose would result in multiple duplicate bibliographic records as well as a much higher (double) cost to the development itself, as the searching functionality of Koha would need to be altered as well. The cost for the proposed development listed above would be roughly \$35,000.00.

Catalyst IT:

Chris Cormack, Lead Developer, one of the first Koha developers and continues to be actively engaged with the worldwide Koha community. He received his BA in MāStudies and Mathematics as well as his B.Sc. in Computer Science from Massey University in New Zealand, is a strong and effective advocate for Koha and takes part in the regular KohaCon conferences, as well as providing ongoing support for a number of Koha clients. Chris has been named Koha Author of the Year three times and Koha Author of the Month twenty-seven times since October 1999. Chris was chosen as Release Manager for the Koha 3.4 development which was released in April 2011. Chris was named Open Source Contributor of 2007 at the New Zealand Open Source Awards. He was an honorary speaker at Linux Conference Australia in 2006. He received the Computerworld Excellence Awards in 2004 for excellence in the field of Information Technology. He received the TUANZ Interactive Award in the Community/Not for Profit category in 2000. He also received the 3M Award for Innovation in Libraries in 2000.

Robin Sheat, Developer, earned his MS in Computer Science from the University of Otago. Robin joined Catalyst as Perl, Javascript, and Java developer in 2009 and has since then worked on Stuff.co.nz, New Zealand's biggest and most prominent online news web site, and Koha. He is a developer for Koha as well as package maintainer for Koha, including Catalyst's MyKoha service (<http://mykoha.co.nz>). In his spare time, Robin is the primary developer for an open source Java-based desktop application.

Srdjan Jankovic, Senior Developer, holds a Bachelor in Electrical Engineering (Honors) from the University of Belgrade, Yugoslavia, and is an experienced developer in Perl, the programming language of Koha and has contributed code to Koha since early 2010. Srdjan has worked as Senior Developer with McCarthy & Associates (1995-1996) and CPS Systems (1996-2000) prior to joining Catalyst IT.

6. There are two different support scenarios we are considering and we would like pricing information for both:

- (1) Your company will provide all support for setup and ongoing use of the system to all staff of all libraries in nhaisLOCAL. Please explain what support would be available and what it would cost on an annual basis for the entire group. If priced per library please indicate that.

If the nhaisLOCAL opted to utilize ByWater's support system for all libraries and library staff within the system, ByWater would make available all methods of support including 24/7 phone support, the ByWater ticketing system, live chat, training refreshers, and updates and upgrades to the Koha database on a monthly basis. ByWater's full support offering can be viewed on "Attachment C" of this document. This scenario would be much more costly for nhaisLOCAL because of the amount of time which would be needed to support each individual library separately. The cost for this scenario would be *\$65,000.00 per year for up to 70 libraries*. This translates to roughly *\$928.00 per site* which is a substantial discount from our price of \$2,200.00 per site for libraries with 50,000 bib records or less. In this scenario each member library would have their own login information for the ByWater support portal. The price listed above can also be found listed on "Attachment B" of this document.

- (2) Staff at the NH State library would provide first level phone support for nhaisLOCAL libraries and ByWater would provide support to our staff (or the staff from participating libraries we would refer to you) for issues we cannot resolve. Please explain what support would be available and what it would cost on an annual basis for the entire group. If priced per library please indicate that.

If the nhaisLOCAL opted to utilize ByWater's support system as a second tier support interface to be accessed after the issue is channeled through nhaisLOCAL staff, ByWater would make available all methods of support, including 24/7 phone support, the ByWater ticketing system, live chat, training refreshers, and updates and upgrades to the Koha database on a monthly basis. This scenario would allow for up to 5 users within the ticketing system and would be much less expensive than ByWater fielding all member support issues directly. The cost for this scenario would be *\$21,000.00 per year for up to 70 libraries*. This translates to roughly *\$300.00 per site* which is a substantial discount from our price of \$2,200.00 per site for libraries with 50,000 bib records or less. The price listed above can also be found listed on "Attachment B" of this document.

Support is the most important aspect of the services we provide to our partner libraries. We strongly believe that the proper support relationship can make all the difference when utilizing an open source solution, and allows you to take full advantage of all that Koha has to offer. The support you receive for your money is far more than a proprietary solution offers, and you get it for a fraction of the cost. Because of the lack of vendor lock in, support is what open source vendors like ByWater are judged based on. That said, ByWater Solutions has been ranked in the top 3 support companies in the country for satisfaction in support for public libraries for the last two years on Marshall Breedings annual Perceptions Survey on Automation.

7. Depending on which support scenario we decide to go with, our training needs may be different as well. Please provide pricing on each of these options.

- 1) ByWater would provide training for each individual library as it gets ready to implement the system. Please explain how this training would be done and what it would cost.

If ByWater were to train each individual library as the system came on, the price for onsite training would be \$3,600.00 for 3 days of onsite training per library. ByWater also offers webinar training for \$350.00 per module (there are 5 total). We tailor training schedules according to our library's needs in terms of what is covered on which day. Onsite training is done using a combination of hands on and lecture techniques. After a library has been trained onsite, webinar training refreshers are included as part of ByWater's support services. This would be the most expensive option for nhaisLOCAL, as each library would be charged \$3,600.00 for training.

- 2) Staff here at the NH State Library would train each library system as it implements. ByWater would train us on using the system and would help us set up a training program to use with libraries. Please explain how this training would be done and what it would cost.

If ByWater were to train the staff of nhaisLOCAL on the functionality of Koha, the cost would be \$3,600.00 for the initial 3 days of training. We would not suggest solely using webinar training in this scenario. We would use webinar training modules after the initial training free of charge so as to reinforce any training that was received. In addition, the NH State Library staff would most likely want to take advantage of multiple onsite training sessions spread out throughout the year. We tailor training schedules according to our library's needs in terms of what is covered on which day. Onsite training is done using a combination of hands on and lecture techniques. This would be the least expensive option for nhaisLOCAL as it would most likely require three 3 day training sessions for a total cost of \$10,800.00 over the course of one year.

- 3) Is there another training model that you would suggest? If so please describe and outline the relevant costs.

The training regimen as suggested by ByWater would be a combination of scenarios one and two. ByWater would train the nhaisLOCAL staff initially before the first go live's begin so that the first libraries on the system would be trained by nhaisLOCAL staff and also ByWater via webinar refreshers (at no cost). After the initial libraries go live, we would suggest another onsite training for the staff of nhaisLOCAL as listed in scenario two, however existing libraries as well as libraries scheduled to go live next would also attend this three day session. This would allow for a reinforcement to the nhaisLOCAL staff, as well as for the libraries who have gone live, and an introduction for the upcoming go live libraries so as to make their training needs less intensive. This regimen could continue every 3 months until all libraries are live on the nhaisLOCAL system. This scenario would cost the same as that listed in scenario two, however it would result in more participation by member libraries and would result in less training related support issues and more knowledge of the system as a whole.

8. If this project is implemented, we want each library to have it's own online public catalog that integrates the various databases and downloadable book resources that are available to our State's citizens through their public libraries that allows the library to include their local information (blogs, social media etc) on their site. What additional costs or services will be needed to get us there?

ByWater Solutions would be able to provide each member library that is part of nhaisLOCAL with a static IP address which would contain a customized OPAC containing all of the enhanced content listed above. Each OPAC would only show information as it pertains to the library website being accessed via that custom URL. The price per library for individual OPAC customization would be *\$800.00 per library*. This pricing is also listed on "Attachment A" of this document. Libraries would be presented with 4 basic templates to choose from, which would then be customized with the library's logo, colors and enhanced content.

9. What will the annual costs (separated our from implementation be?)

As listed on "Attachment B" of this document, the total cost for all 70 libraries to be hosted *and* supported by ByWater would be *\$86,000.00 per year for scenario #1*, and *\$42,000.00 per year for scenario #2*. Specific timelines for these charges to take effect would need to be determined once a migration plan was put in place. Hosting charges are a fixed cost as the server for the whole system will need to be allocated and created at the beginning of the project.

10. Are there options we should consider that would bring the costs down on this project?

The best way to keep costs down on this project would be to bring in the first tier of support internally so as to lower annual support costs. In addition, using option #2 or #3 for training would result in substantial initial savings. By finding the development listed above, the nhaisLOCAL catalog would save a very large amount on annual hosting costs, as the system would be able to remain a single database instead of 70 separate servers. In addition, utilizing the item information on the bibliographic record as the local control variable will result in a much less expensive development cost for the catalog.

We truly believe that Koha is a perfect fit for the goals and needs of the nhaisLOCAL catalog project and we hope to have the chance to be a part of this fantastic service to New Hampshire libraries. Please consider me as a resource for your organization as your exploration into this possibility continues, and please understand that we are open to discussion on the specifics on any aspect of our pricing proposal. With our commitment to work with the New Hampshire State Library comes a great deal of flexibility on our end. Because of the valued relationships we have with our existing Koha libraries in your state, we hold the State of New Hampshire very close to our hearts and would be thrilled to have the opportunity to bring our services and acclaimed support to your libraries on a larger scale. Thank you again for the opportunity to submit our responses for your request for proposal and have a great day.

Attachment A

IMPLEMENTATION COSTS

Item	Cost	Timeline
Complete Koha Install and Customization	\$22,000.00	Six Months For Completion
Data Migration	\$.08 Per Record	Six Months For Completion
OPAC Customization	\$800.00 Per Library	TBD
Suggested Required Development	\$35,000.00	Development will be available prior to go-live
Training	\$3,600.00 \$350.00 per Webinar	Per 3 Days of Onsite Training



Attachment B

ANNUAL SUPPORT AND HOSTING COSTS

Item	Cost	Timeline
Unlimited Support Scenario One	\$65,000.00 Per Year Up to 70 Libraries	24/7 Support
Unlimited Support Scenario Two	\$21,000.00 Per Year Up to 70 Libraries	24/7 Support
Hosting	\$21,000.00 Per Year Up to 70 Libraries	Triple Redundancy Nightly Backups



FREE LIBRARY SYSTEM

www.bywatersolutions.com



ByWater Solutions Support Package and Interfaces

Quality of support is the most important focus of our company and we pride ourselves on the implementation of this key feature. ByWater Solutions has the lowest customer to support personnel ratio in the business.

Our support package includes, but is not limited to:

- Technical consulting and problem solving
- Training questions
- Consultation with network configuration
- Customizations and "tweaking" to the OPAC and staff side interfaces
- Report generation
- Bug-fixes and the application of community released bug fix enhancements as they become available
- Management and updating of community or customer sponsored enhancements.
- Training for all major updates to Koha's functionality via webinar to your team at no additional cost.
- 24/7 monitoring of your hosted server
- Regular updates to your Koha system as new functionality becomes available to you, as well as the application of new releases to your system as they are made available (usually every 4-6 months)

If you are having an issue with your system, our support team will help to solve the problem. Our support package is completely comprehensive and ensures the best possible Koha experience for our customers.

Methods of interface for our support include:

- 24/7 toll free calling
- Ticketing system with report generation
- Staff email
- Live chat during business hours via Koha Community IRC
- Access to administrative contact information for escalation of support issues

We also ensure all of our customers have the tools to be plugged into the wealth of knowledge and expertise available within the Koha community.

Request for Information – nhaisLOCAL Cooperative Library Project

April 19, 2012 – Prepared by Equinox Software, Inc.

Contact Information

Please forward all questions to:

Robert Herrmann, Director of Sales

Equinox Software, Inc.

Office: (877) 673-6457

Email: rherrmann@esilibrary.com or sales@esilibrary.com

Upon acceptance, the signed Statement of Work may be returned to Equinox electronically to sales@esilibrary.com, by fax to (866) 497-6390, or by mail to:

Equinox Software, Inc.

P.O. Box 69

Norcross, GA 30091

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Summary

Equinox Software, Inc. (ESI) appreciates the opportunity to present a response to the New Hampshire State Library for the nhaisLOCAL project.

Equinox is presenting a proposal for both Evergreen and Koha in our response. Both ILSs present some unique qualities that could be leveraged to meet the goals of the nhaisLOCAL project. Our response will be provided in three sections:

- Section 1 is devoted to describing a 'Payment Schedule' that is applicable for both our Evergreen and Koha proposal.
- Section 2 is devoted to describing our proposal for Evergreen including responses to the specific questions posed by the New Hampshire State Library request for information.
- Section 3 is devoted to describing our proposal for Koha including responses to the specific questions posed by the New Hampshire State Library request for information.

In the case for both Evergreen and Koha, Equinox will extend our hosting services for the cooperative and support nhaisLOCAL as a group. Equinox will also provide a project manager dedicated to the ongoing implementation of the member libraries as they continue to join the cooperative.

We appreciate the opportunity to discuss strategies that we have successfully deployed with other statewide initiatives and be considered as a partner for the nhaisLOCAL project.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Robert Herrmann', with a large, stylized initial 'R'.

Robert Herrmann, Director of Sales

Equinox Software, Inc.

1. Payment Schedule

Equinox has significant experience working with large regional, provincial, and state libraries with implementing statewide ILS solutions. Due to the progressive nature of the nhaisLOCAL project, in which libraries will continue to join the cooperative, Equinox is recommending a model that is similar to the project plans utilized in both the North and South Carolina State Library automation projects.

Equinox is proposing a 'subscription' based payment schedule that may be applied to both the proposed Evergreen or Koha projects as described, herein. With this model, there is a one-time cost for the provisioning of the hosting environment that will be shared by the nhaisLOCAL cooperative libraries. As libraries become members, they will sign 'partnering' agreements that triggers their project and the associated costs. The associated costs are based on a fixed schedule for services.

Equinox will assume the responsibility to:

- Provisioning of hardware
- Power, bandwidth, and data center charges
- Operating System and Database upgrades
- Evergreen software updates (patches and major releases)
- Backup of your database including storage
- 'Warm' standby of your database
- 24x7x365 system level support including Real-time system monitoring for hardware, network and Evergreen system critical events
- Reactive support for 'local software administration functions' provided during normal business hours (9am-6pm Eastern) provided to nhaisLOCAL technical staff.

The proposed 'Master Service Agreement' will be provided to the State Library of New Hampshire that details the hosting and support relationship. It is within this agreement that we also establish the 'Payment Schedule' of the services that Equinox provides and would be made available to the libraries partnering in the cooperative. We would also expect to work with the State Library to establish a 'Partner Library Agreement' template to expedite the process for allowing libraries to join the cooperative.

The 'Partner Library Agreement' is based on the established 'Payment Schedule', and would serve as a statement of work for the services selected by the library to join the



cooperative. Included would be a 'subscription' cost that will then comprise the cooperative annual costs.

We feel that the subscription model works for the proposed nhaisLOCAL. Costs will be based on participation and will be applied as libraries join the cooperative. The costs should be predictable allowing for planning based on available budgets.

Equinox has experience working with other project plans and remains open to discuss these options if the proposed Subscription Model is unsatisfactory.

2. Evergreen

1. Evergreen installation

Equinox is proposing an Evergreen installation for the nhaisLOCAL cooperative based on some of the inherent strengths of the design and architecture of the software that may be leveraged to encourage greater sharing among the partnering libraries.

Evergreen was initially designed for a statewide, shared library consortium in the state of Georgia. From concept to design, Evergreen was constructed for scaling the system as necessary to account for growth and granular to allow local library policies to be established in a shared system. Since the initial implementation, Evergreen has been implemented at a number of other statewide and multi-type library consortia based on its inherent flexibility.

The New Hampshire State Library has specifically requested a proposal that is not a union catalog solution. Equinox acknowledges and understands this request. The Evergreen solution is a shared catalog but does not need to serve as a replacement of the existing statewide ILL system. Evergreen policies allow for the shared system to be implemented without including circulation resource sharing.

The strengths that we see with the Evergreen approach to this project are listed:

- Even in a shared system, Evergreen can allow for each member library to have their own OPAC branding.
- There is a single, centralized administrative interface for local administrators to maintain the cooperative policies.
- Equinox policies are created in a hierarchical structure, allowing for shared policies to be inherited down across the cooperative.
- Evergreen would be able to support inter-local lending agreements, if required, through Evergreen policies.
- A shared bibliographic database may improve the overall quality of records.
- Evergreen allows for segmented views, edits, creation, and deletes for all functional areas of the application.
- Evergreen would allow an easy mechanism for sharing report templates among member libraries.

- The New Hampshire State Library would be able to run centralized reports for the partner libraries.
- Evergreen could support local or centralized subscriptions to 3rd party vendors.

The negatives of the shared Evergreen installation are listed

- The request stipulates that the solution not be a union catalog
- Some development would be required to fully segment views for patron records between partner libraries.
- The data migration would include strongly recommended bibliographic de-duplication services following each partner library implementation wave.

2. *Cost of software install and customization for the first year?*

Please indicate the turnaround time for this and if it is based on a per-library, or a minimum number of libraries at once, or a flat-rate for the group.

Equinox will install the latest stable, community-supported version of the Open-ILS at the Equinox data center located at Quality Technology Services (QTS) in Suwanee, GA. Equinox will provision the hardware and network capacity to meet the needs for your library throughout the relationship between Equinox and the library.

There would be an initial installation cost for the Koha 'cluster' that would be applied as a one-time cost for the consortium. The proposed cost for the Cluster is based on the projected size of nhaisLOCAL (70 libraries and <600,000 bibliographic records.

- Master Agreement Cost (one-time cost) – \$52,000.00 and an annual base cost of \$3,500.00.

The installation cost for each member library would be applied as part of the proposed subscription cost as the libraries join the nhaisLOCAL project. The subscription cost is presented in our response to question 2.4.

3. *Cost (per record) for data loading:*

Please explain what is (or is not) included in the cost

Data migration includes two parts: data extraction from the legacy ILS of the member library and the migration of that data to their Koha database. The data extraction service is optional and will not be applied in the event that the member

library is able to provide Equinox with data from their legacy ILS. The data extraction is also only eligible for libraries that can grant Equinox Implementation Staff access to the legacy ILS server.

- Data Extraction Service Flat Rate (one-time cost)- \$1,400.00/data source

All data migration projects include an Equinox project manager, a minimum of one (1) test data load, and a production data load. Equinox proposes the following costs for data migrations, by data type, for the data migration. All data migration costs will be applied as a one-time cost.

- Bibliographic/Item/Authority Records = \$.09/bibliographic record (minimum of \$1,000 per load)
- Patron Records = provided at no additional cost
- Circulation Loan Records = \$1,000.00/data source
- Circulation Fee Records = \$1,000.00/data source
- Circulation Hold Records = \$1,000.00/data source

Equinox is able to provide additional data migration services for Acquisitions and Serials data. Pricing for this data type will be presented upon request.

In a shared system, Bibliographic Deduplication would be required following each member migration group joins the union catalog.

- Bibliographic Deduplication = \$1,400.00/run

4. Annual cost of hosting our system:

If this cost will vary between the first and subsequent years, or change based on participation levels, please explain how that breakdown will work. Also, what specific services are included in hosting.

The Equinox subscription service includes:

- Extending the hosting environment to support the nhaisLOCAL cooperative.
- Configuration of the Evergreen environment for the partner library
- Local policy configuration and OPAC branding
- Extending support for the partner library
- Project management for the partner product

The subscription costs will be added as libraries join the system. The base subscription rate will be applied on a scale based on the size of the partner library. The first year cost will be prorated to the annual renewal date as established in the Master Agreement then applied fully at the renewal date for subsequent subscription years.

Subscription Rate Scale for joining libraries:

- 0-10K Bibliographic Records = \$500.00 annually
- 10K-25K Bibliographic Records = \$1,000.00 annually
- 25K-50K Bibliographic Records = \$1,500.00 annually
- 50K-75K Bibliographic Records = \$2,000.00 annually
- 75K-100K Bibliographic Records = \$2,500.00 annually
- 100K-125K Bibliographic Records = \$3,000.00 annually
- \$125K-150K Bibliographic Records = \$3,500.00 annually

5. Will any development be needed to implement our system? If so, please explain what will be needed and how much it will cost. Please indicate if this work is something your company would do, or if it would be contracted to someone else?

Evergreen was designed for consortia allowing for libraries to share a union catalog but to allow for local policy control, and controlled access to member libraries locally-owned records. However, some additional development would be required to fully complete protected views of patron and circulation data limiting them to a single library.

Equinox would propose to provide the development of this enhanced scoping using Equinox staff. Costs will be presented upon a further discussion of the scope of the development project.

6. There are two different support scenarios we are considering and we would like pricing information on each.

#1 – your company will provide all support for set up and ongoing use of the system to all staff of all libraries in nhaisLOCAL. Please explain what support would be available and what it would cost on an annual basis for the entire group. If this is priced per library, please indicate that.

In a shared Evergreen installation, option #1 would not be supported.

#2 – Staff here at the NH State Library would provide first level phone support for nhaisLOCAL libraries and your company would provide support to our staff (or to the staff participating libraries whom we refer to you) for issues we cannot resolve. Please explain what support would be available and what it would cost on an annual basis for the entire group. If this is priced per library, please indicate that.

If nhaisLOCAL staff were to provide Tier 1 support for the nhaisLOCAL partner libraries, there would be no additional cost than as proposed in the subscription costs established in the Master Agreement in 2.2 and the Subscription Cost in 2.4.

#3 – Is there another support model that you would suggest? If so, please describe it and outline the relevant costs.

No additional support models are recommended.

7. Depending on which support scenario we decide to go with our training needs may be different as well. Please provide pricing on each of these options.

#1 – your company will provide training for each individual library as it gets ready to implement the system. Please explain how this training would be done (online, in-person, etc.) and what it would cost.

Scenario #1 – Equinox would provide training for each partner library either onsite or online. The cost would be based on the number of days required based on the functions that would be used at each library. Costs for training are provided at \$1,500.00 per day. The recommended class length for each class is presented. Each class would allow for up to 25 participants.

- Evergreen Introduction and OPAC – ½ day
- Circulation – 1 day
- Cataloging – ½ to 1 day
- Acquisitions – ½ day
- Serials – ½ day
- Reports and Administration – ½ day

#2 – Staff here at the NH State Library would train each library as it implements. Your company would train us on using the system and would help us to set up a training program to use with libraries. Please explain how this training would be done (online, in-person, etc.) and what it would cost.

Scenario #2 – Equinox staff would provide ‘train the trainer’ training to nhaisLOCAL staff onsite covering all modules of Evergreen. The training would be provided on-site over two (2) days at a rate of \$2,000.00/day plus travel for up to 25 participants.

#3 – Is there another training model that you would suggest? If so, please describe it and outline the relevant costs.

Scenario #3 – Equinox would propose a combination of both on-site nhaisLOCAL staff central training, online partner library training, and ongoing online training for Evergreen updates at the rates already provided in 2.7.1. We view the ongoing relationship being a partnership to continue keeping the partner libraries staff trained and informed of new developments that may influence their local workflows.

8. If this project is implemented, we want each library to have its own online public catalog that integrates the various databases and downloadable book resources that are available to our state’s citizens through their public libraries and allows the library to include their local information (blogs, social media links, etc.) on their site. What additional costs or services will be needed to get us there?

There are no additional costs than as has been presented for libraries to localize their Evergreen OPAC when using the available Evergreen-community supported CSS and locally developed templates.

9. What will the annual costs (separated out from implementation) be?

Equinox has proposed a subscription service where the annual costs will be based on the Master Agreement annual cost presented in 2.2 and the number of libraries participating according to the scale provided in 2.4.

10. Are there options that we should consider that would bring down the costs of this project?

The proposed subscription model has proven to be the most cost effective manner for deploying statewide systems according to Equinox’s experience.

Training services may be a way to save costs over time if shared during implementation or over-time if nhaisLOCAL provides all or part of the training services.

3. Koha

1. Koha Installation

Equinox is proposing a Koha installation in which each partner library will have their own Koha installation and database. Equinox will install the libraries with a 'standard' set of configuration options that are determined for the cooperative and may be based on the library type (i.e. public, academic, school, special). The proposed pricing will mandate that partner libraries are all running the same version of Koha. The nhaisLOCAL partner libraries will be upgraded in unison or on the same time schedule. For the proposed costs, customizations (or localizations) will be limited to those that are applicable from the standard Koha policies and tools.

The strengths that we see with the Koha approach to this project are listed:

- Partnering libraries will control a unique Koha database
- Policies will be controlled from a local library level
- The New Hampshire State Library and partner libraries will be able to continue interfacing with the state supported union catalog as is currently established
- No additional development is required to implement the ILS as proposed

The negatives that we see with the Koha approach to this project are listed:

- Local policy maintenance will be de-centralized
- Reports will be de-centralized
- Inter-local agreement for resource sharing will be controlled through a separate system

2. Cost of software install and customization for the first year?

Please indicate the turnaround time for this and if it is based on a per-library, or a minimum number of libraries at once, or a flat-rate for the group.

Equinox will install the latest stable, community-supported version of the Open-ILS at the Equinox data center located at Quality Technology Services (QTS) in Suwanee, GA. Equinox will provision the hardware and network capacity to meet the needs for your library throughout the relationship between Equinox and the library.

There would be an initial installation cost for the Koha 'cluster' that would be applied as a one-time cost for the consortium. The proposed cost for the Cluster is

based on the projected size of nhaisLOCAL (70 libraries and <600,000 bibliographic records.

- Master Agreement Cost (one-time cost) – \$40,000.00 and an annual base cost of \$3,500.00.

The installation cost for each member library would be applied as part of the proposed subscription cost as the libraries join the nhaisLOCAL cooperative. The subscription cost is presented in 3.4.

3. Cost (per record) for data loading:

Please explain what is (or is not) included in the cost

Data migration includes two parts: data extraction from the legacy ILS of the member library and the migration of that data to their Koha database. The data extraction service is optional and will not be applied in the event that the member library is able to provide Equinox with data from their legacy ILS. The data extraction is also only eligible for libraries that can grant Equinox Implementation Staff access to the legacy ILS server.

- Data Extraction Service Flat Rate (one-time cost)- \$1,400.00/data source

All data migration projects include an Equinox project manager, a minimum of one (1) test data load, and a production data load. Equinox proposes the following costs for data migrations, by data type, for the data migration. All data migration costs will be applied as a one-time cost.

- Bibliographic/Item/Authority Records = \$.09/bibliographic record (minimum of \$1,000 per load)
- Patron Records = provided at no additional cost
- Circulation Loan Records = \$1,000.00/data source
- Circulation Fee Records = \$1,000.00/data source
- Circulation Hold Records = \$1,000.00/data source

Equinox is able to provide additional data migration services for Acquisitions and Serials data. Pricing for this data type will be presented upon request.

In addition, Equinox may provide data cleanup services (i.e. bibliographic deduplication). Pricing for data cleanup services will be presented upon request.

4. Annual cost of hosting our system:

If this cost will vary between the first and subsequent years, or change based on participation levels, please explain how that breakdown will work. Also, what specific services are included in hosting?

The Equinox subscription service includes:

- Extending the hosting environment to support the nhaisLOCAL cooperative.
- Configuration of the Koha environment for the partner library
- Local policy configuration and OPAC branding
- Extending support for the partner library
- Project management for the partner product

The subscription costs will be added as libraries join the system. The base subscription rate will be applied on a scale based on the size of the partner library. The first year cost will be prorated to the annual renewal date as established in the Master Agreement then applied fully at the renewal date for subsequent subscription years.

The subscription costs will be added as libraries join the system. The base subscription rate will be applied on a scale based on the size of the partner library. The first year cost will be prorated to the annual renewal date as established in the Master Agreement, and then applied fully at the renewal date for subsequent subscription years.

Subscription Rate Scale:

- 0-10K Bibliographic Records = \$500.00 annually
- 10K-25K Bibliographic Records = \$1,000.00 annually
- 25K-50K Bibliographic Records = \$1,500.00 annually
- 50K-75K Bibliographic Records = \$2,000.00 annually
- 75K-100K Bibliographic Records = \$2,500.00 annually
- 100K-125K Bibliographic Records = \$3,000.00 annually
- \$125K-150K Bibliographic Records = \$3,500.00 annually

5. Will any development be needed to implement our system? If so, please explain what will be needed and how much it will cost. Please indicate if this work is something your company would do, or if it would be contracted to someone else?

For the proposed Koha implementation, no additional development would be required.

6. *There are two different support scenarios we are considering and we would like pricing information on each.*

The proposed Koha installation would assume that all Koha installations are running the same version of Koha, upgrade in unison, and that there are no 'local customizations' beyond the localization allowed under the standard Koha administration functions.

#1 – your company will provide all support for set up and ongoing use of the system to all staff of all libraries in nhaisLOCAL. Please explain what support would be available and what it would cost on an annual basis for the entire group. If this is priced per library, please indicate that.

For scenario #1, Equinox could provide support for each partner library. The cost would be an additional \$500.00/partner library above the subscription costs presented in 3.4.

#2 – Staff here at the NH State Library would provide first level phone support for nhaisLOCAL libraries and your company would provide support to our staff (or to the staff participating libraries whom we refer to you) for issues we cannot resolve. Please explain what support would be available and what it would cost on an annual basis for the entire group. If this is priced per library, please indicate that.

If nhaisLOCAL staff were to provide Tier 1 support for the nhaisLOCAL partner libraries, there would be no additional cost than as proposed in the subscription costs presented in 3.4.

#3 – Is there another support model that you would suggest? If so, please describe it and outline the relevant costs.

No additional support models are recommended.

7. *Depending on which support scenario we decide to go with our training needs may be different as well. Please provide pricing on each of these options.*

#1 – your company will provide training for each individual library as it gets ready to implement the system. Please explain how this training would be done (online, in-person, etc.) and what it would cost.

Scenario #1 – Equinox would provide training for each partner library online. The cost would be based on a ‘per class’ rate. Each class is provided by topic and is approximately 2 hours in length. The rate is \$250.00 per class for up to 5 participants. Additional participants may be included in the training at a cost of \$75.00 per participant.

- OPAC
- Circulation
- Cataloging
- Acquisitions
- Serials
- Reports
- Koha Tools
- Koha Administration

#2 – Staff here at the NH State Library would train each library as it implements. Your company would train us on using the system and would help us to set up a training program to use with libraries. Please explain how this training would be done (online, in-person, etc.) and what it would cost.

Scenario #2 – Equinox staff would provide ‘train the trainer’ training to nhaisLOCAL staff onsite covering all modules of Koha. The training would be provided on-site over two (2) days at a rate of \$2,000.00/day plus travel for up to 25 participants.

#3 – Is there another training model that you would suggest? If so, please describe it and outline the relevant costs.

Scenario #3 – Equinox would propose a combination of both on-site nhaisLOCAL staff central training, online partner library training, and ongoing online training for Koha updates at the rates already provided. We view the ongoing relationship being a partnership to continue keeping the partner libraries staff trained and informed of new developments that may influence their local workflows.

8. If this project is implemented, we want each library to have its own online public catalog that integrates the various databases and downloadable book resources that are available to our state’s citizens through their public libraries and allows the library to include their local information (blogs, social media links, etc.) on their site. What additional costs or services will be needed to get us there?

There are no additional costs than as has been presented for libraries to localize their Koha OPAC when using the available Koha-community supported CSS and locally developed templates.

9. *What will the annual costs (separated out from implementation) be?*

Equinox has proposed a subscription service where the annual costs will be based on the Master Agreement annual cost presented in 3.2 and the number of libraries participating according to the scale provided in 3.4.

10. *Are there options that we should consider that would bring down the costs of this project?*

The proposed subscription model has proven to be the most cost effective manner for deploying statewide systems according to Equinox's experience.

Training services may be a way to save costs over time if shared during implementation or over-time if nhaisLOCAL provides all or part of the training services.

Conclusion

Equinox has unequalled experience in implementing open source Integrated Library Systems for statewide, multi-type library systems. We are able to boast in being the only known organization that employs recognized committers to both the Evergreen and Koha communities. We have in-house staff that is able to provide services devoted to the development, implementation, and support of partner with the New Hampshire State Library to successfully implement the nhaisLOCAL cooperative project.

We have presented options describing the method we'd approach for using the inherent strengths of both the Evergreen and Koha Integrated Library Systems. We appreciate the opportunity to answer any additional questions and further form the project to meet the needs of the project in the most efficient and cost effective manner.

New Hampshire State Library
nhaisLOCAL

REQUEST FOR INFORMATION



8480 Baltimore National Pike 221
Ellicott City, MD 21043
Ph: 443 690 8488



April 20, 2012



April 20, 2012

Michael York
New Hampshire State Librarian
20 Park Street
Concord NH 03301

Sub: RFI - nhaisLOCAL

Thank you for the opportunity to participate in your Request for Information for setting up a library cooperative named **nhaisLOCAL** for public, school, and special libraries in the state of New Hampshire.

The Fantail – Nucsoft OSS Labs team is pleased submit this detailed response. Please do not hesitate to call on us if you have any questions or wish to explore any aspects in more detail. We shall only be too pleased to provide more information and help you in your endeavor.

Sincerely,

Pat Pathade

Pat Pathade
CEO
Fantail Consulting & Technologies LLC
www.fantailtech.com
443 690 8488

1. Executive Summary

The Fantail Team is pleased to submit this document of information to New Hampshire State Library in response to your RFI for a setting up a library cooperative for public, School, and special libraries in the state of New Hampshire.

The Fantail Team consists of Fantail Consulting & Technologies LLC and Nucsoft OSS Labs, a division of Nucsoft Inc. The principals of Fantail and Nucsoft have a strong working relationship that has existed for almost a decade.

- Fantail specializes in providing modern cloud computing and secure open-source software solutions. The company provides high quality information technology (IT) products and services, including web content management solutions and systems, data management solutions and systems, systems integration, custom application development, and project management.
- Nucsoft OSS Labs specializes in providing Koha library management solutions. Nucsoft is an **ISO 9001 Certified** company, the only one among Koha vendors worldwide, with a 15 year track record of IT services to large customers. The OSS Labs unit provides solutions for Open Source Software (OSS) with a major focus on Koha, the open source software for library systems. The OSS Labs unit has deep Koha experience, highly qualified staff, and a strong commitment to Koha support and development. The OSS Labs' mission is to bring to the library world, the same superior standard of IT services for Koha, that have been honed over 15 years by Nucsoft in doing mission critical work for large financial institutions and corporations.

Our approach in implementing this project would be to bring you literally the best of two worlds in maximizing economic benefits but without compromising quality – we would manage the project locally with a client facing project management team, and execute most of the technical work overseas in the OSS Labs offices in India. We host all our solutions on Amazon Web Services cloud infrastructure located at several places in the United States.

We have for reference at the end of this document, a presentation of a project implemented for British Library that is similar in complexity and size

2. Responses to the RFI

1. Which software: We will use Koha to build the solution.
2. Install and customization (app configuration): \$ 900 per library.
3. Cost per record for data loading: \$0.04 per item record. This will include massaging/transforming items data to fit Koha, deduplication, merging of records will be included. Nothing excluded. However, manual correction of data is not included.
4. Annual hosting cost: \$ 1,000 per library. This will come with 24*7 support. We have the strongest SLA's in the industry. We do not make a distinction between first and subsequent years of hosting. With more participation will most certainly bring in some economies of scale. Hosting includes software patches, security patches, and everything required to provide you with a usable system.
5. Development: At this time we do not know if you would require any custom development. In our experience, you may not require any development, but it would be prudent to allow a budget of about \$30,000. We do all development in house at a competitive rate of \$20 per hour for developers and \$100 per hour for project management done from here. Project management effort is typically around 10% of the developer effort.
6. Support costs:

Level 1 and Level 2 support: \$ 900 per library per month
Level 2 support: \$ 400 per library per month

Support would be available 24*7. Response time SLAs will be available for each severity level (e.g. Severity 1 – response within 4 hours). As in everything else, larger participation would result in economies of scale.

7. Training:

Option 1: We can do online training for each library as it goes live: \$ 35 per hr. You will need to allow two to three days for training.

Option 2: We can do a combination of onsite followed by online training for ongoing training. Onsite training will require a per diem allowance plus travel costs in addition to the hourly rate.

8. Catalog/website for each library:

Koha's content mgmt capabilities are not great, so we propose to use Drupal to provide a website for each library. Drupal has rich capabilities for content management, blogs and social media. It will include a catalog site for each library as well (single Koha, multi-opac)

Costs per library: \$ 500 per which will include the initial setup, and ongoing software maintenance. This includes just the basic styling of the website and OPAC. If you need a high end website rich in social media, presence, traffic and a multitude of features, the site could cost anywhere from \$5,000 to \$10,000 or even more. This might be warranted for one or two of your libraries

9. All possible options have already been considered in the RFI, without compromising the quality of the end product. Open source software and hosting it in the cloud are two major cost factors. By choosing a team like Fantail-Nucsoft OSS Labs which brings you the benefits of local skilled presence as well as low cost resources for bulk work, you would be able to further lower your costs. Finally, engaging in a multi-year contract option has the potential to bring in some additional savings.

Koha at British Council (BC) Libraries

By Savitra Sirohi
Nucsoft OSS Labs

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BRITISH COUNCIL

Online Catalog

Welcome to the British Council Libraries!
Our online catalog search will help you find what you are looking for.

Search

Advanced Search

There is more to the British Council than just the libraries. Check out our other offerings.

- Events** ☌ Stay informed about what's happening at the British Council
- English** ☌ Sample the best English language resources from the UK
- Join British Council** ☌ Pay online and take a:
 - New membership
 - Online membership
 - Renew your membership
- Exams India | Exams Sri Lanka** ☌ Take an exam for UK qualifications in India & Sri Lanka
- Education** ☌ Explore a range of options for studying in the UK
- Books Online** ☌ 24x7 access to more than 70,000 online books

Log in to Your Account:

LogIn:
Password:
 [Forgot Password?](#)

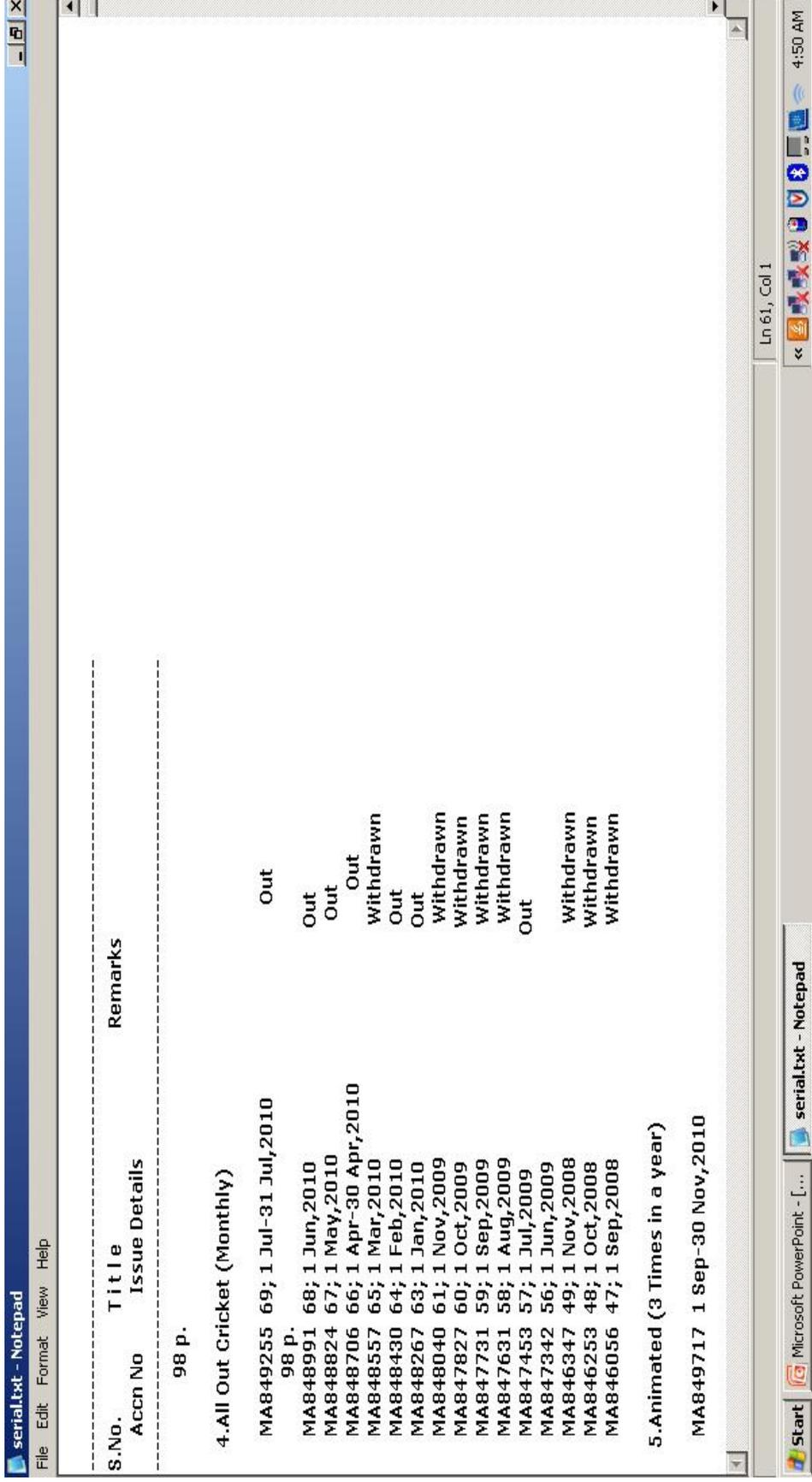
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A People's Republic of India (England and Wales) SC037133 (Scotland).

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get textHELP
BrowseAloud

- Library network, 9 libraries in India, 2 in Sri Lanka
- Attracts professionals, college students, corporate members
- Stats: 2 Million loans per year, over 100,000 members

Data Conversion



- Conversion from Libsys
- RegEx used to convert text files
- Data migrated: Catalog, patrons, holds, checkouts, fines, serial subscriptions

Hosting



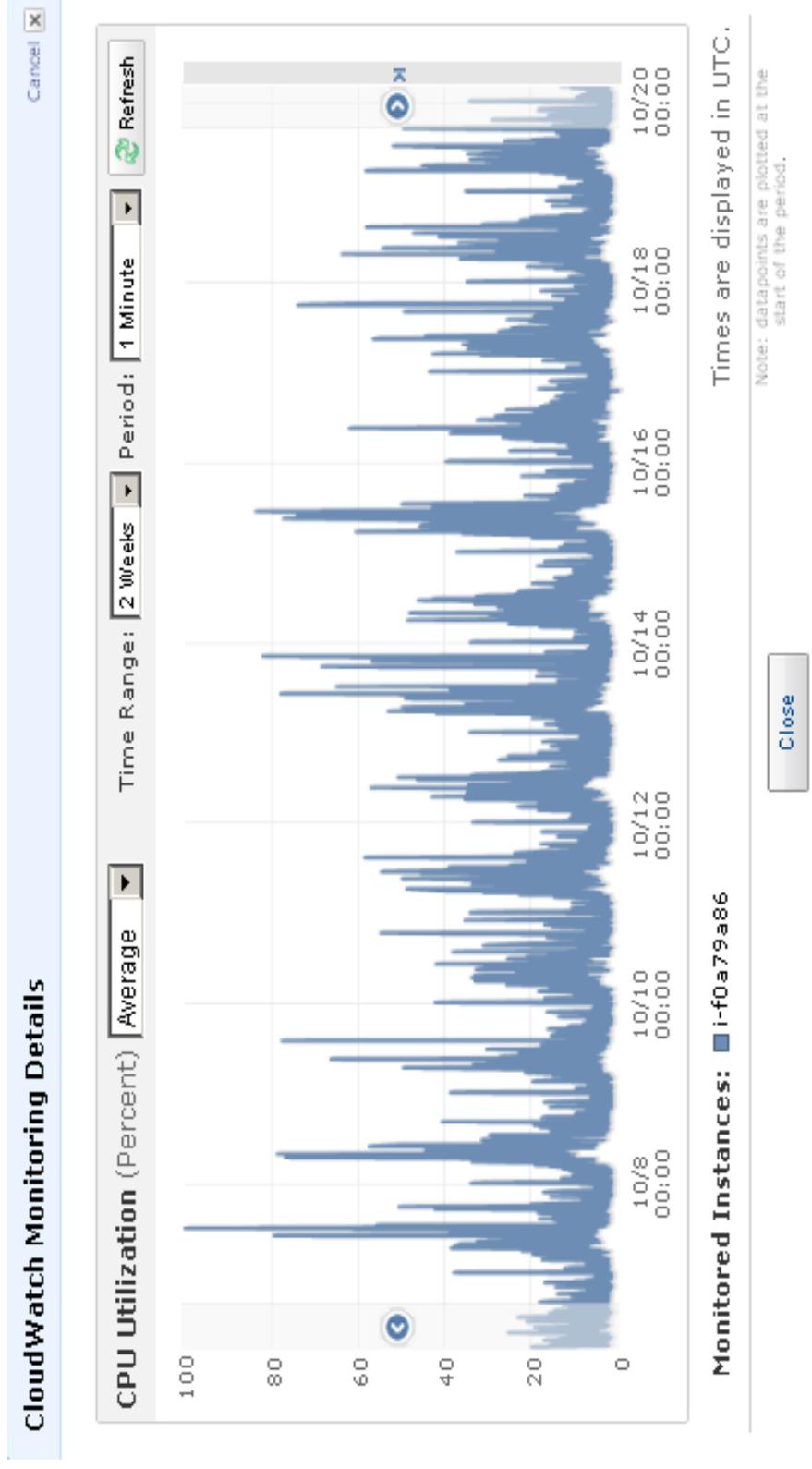
- Koha Servers
- NCIP Servers
- EU datacenters



Ahmedabad, Bangalore, Chennai,
Colombo etc. (10 locations)

- Cost Savings: 10 server locations to one
- Data Privacy: hosting in EU including backup
- Web Access for members

Auto-scaling

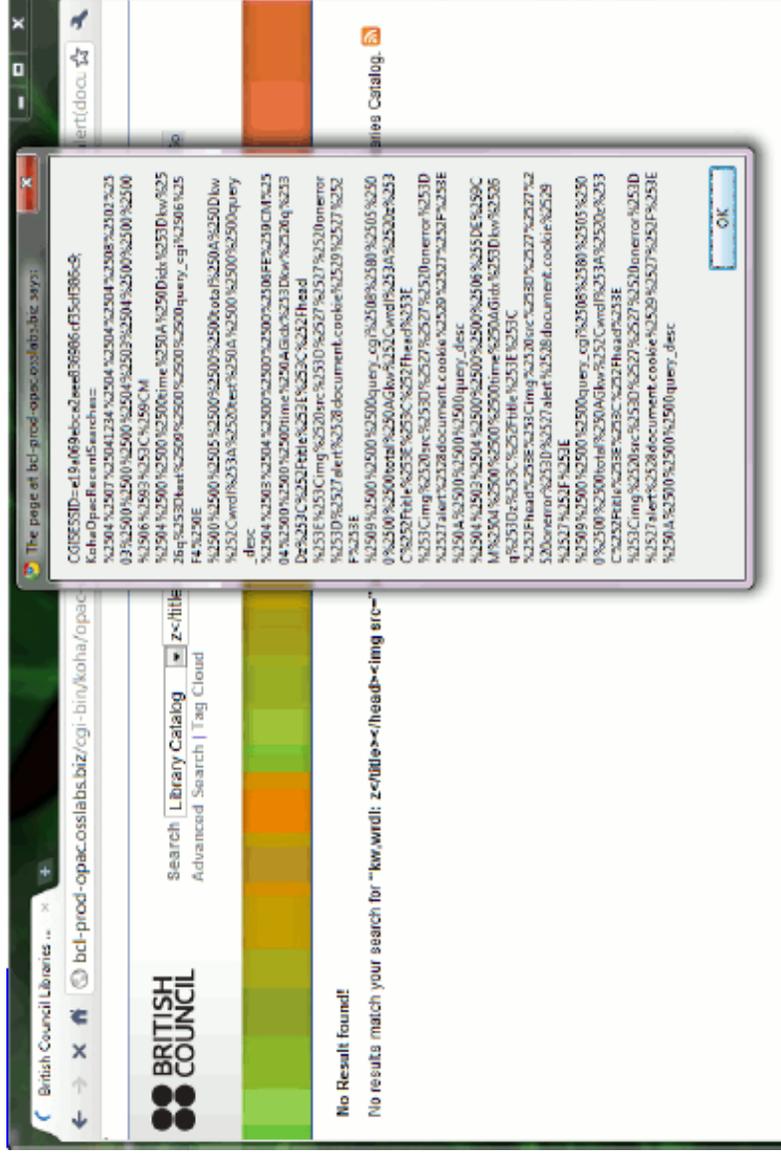


- More servers at peak load, better performance
- Fewer servers at night, lower costs
- Autostarting of new servers if a server fails, high availability

Penetration Testing/Security



Weak Passwords



Cross Site Scripting (XSS)

- Set a high minimum password length
- Set a low timeout period
- SSL Encryption on staff and OPAC
- XSS: Escape HTML globally
- Don't allow names in passwords
- Enforce more complex passwords
- Standard firewall practices
- WIP: password expiry, permissions

Analysis/Reporting

Home > Reports > Borrowers Registration

Borrowers Registration

Patron Category: Gold

Library: Chandigarh

Transaction Date (Range): 20/10/2011

Transaction Date (Range):

Output

To screen into the browser: for a spreadsheet application

To a file:

- Guided Reports
 - [Guided Reports](#)
- Daily Financial Reports - Registrations related
 - [Borrower Registrations Registration Summary](#)
 - [Payment Details by MOP \(Registration\)](#)
- Daily Financial Reports - Fines and Misc transactions
 - [Misc Revenue Details](#)
 - [Payment Details by MOP](#)
- Daily Operational Reports - Members
 - [Borrower Details](#)
 - [A, 10 and 20 - contact information by level and branch](#)
 - [Contact details of Birthday members](#)
- Circulation
 - [Daily Item Renewals](#)
 - [Checkout By Member](#)
 - [Checkout By Accession Number](#)
 - [Checkin By Member](#)
 - [Checkin By Accession Number](#)
 - [Circulation log by date range](#)
 - [List of checkin which has reservations](#)
 - [List of reserved books](#)

Catalog

- Guided reports are not flexible
- Filtering in SQL reports not flexible
- SQL reports choke on complex queries

- Favored strategy was to use above template
- Downside, a patch for each report

Photo & Signature



- Webcam photo capture
- Signature pad capture
- Photo identification card issued immediately

Multi-Library Features

[Home](#) > [Administration](#) > [Circulation and Fine Rules](#)

System Preferences

- [System Preferences](#)

Basic parameters

- [Libraries, branches, groups](#)
- [Item types](#)
- [Authorized values](#)

Patrons and circulation

- [Patron types and categories](#)
- [Cities and towns](#)
- [Road types](#)
- [Patron attribute types](#)
- [Circulation and fines rules](#)

- [Library transfer limits](#)
- [Item circulation alerts](#)

Catalog

- [MARC Bibliographic framework](#)
- [Koha to MARC mapping](#)
- [Keywords to MARC mapping](#)
- [MARC Bibliographic framework test](#)
- [Authority types](#)
- [Classification sources](#)
- [Record matching rules](#)

Acquisition parameters

- [Currencies and exchange rates](#)
- [Budgets](#)
- [Funds](#)

Defining default Enrolment, Renew, Duplicate fees and Grace period

The rules are applied from most specific to less specific, using the first found in this order:

- same library, same patron type, same categories type
- same library, same patron type, default categories type
- same library, default patron type, same categories type
- same library, default patron type, default categories type
- default library, same patron type, same categories type
- default library, same patron type, default categories type
- default library, default patron type, same categories type
- default library, default patron type, default categories type

To modify a rule, create a new one with the same patron type and item type.

Select a library :

Patron Category	Enrolment Fees(Rs)	Renew Fees(Rs)	Duplicate Fees(Rs)	Grace period(in days)	Reserve Fees
Online Members	750.00	750.00	0.00	0	0.000000 Delete
Student Gold	1200.00	1200.00	150.00	30	0.000000 Delete
<input type="text" value="Default"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> Add

- Membership Fees at branch level
- Centralized acquisitions
- Centralized Serials budgeting

- Messaging templates at branch level
- Centralized planning, analysis & monitoring

Third Party E-content

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get textHELP
BrowseAid

- Ebrary integration
- Infotrac integration
- English Courses content

Ongoing Development

- Online Payment Gateway Integration
- Home Delivery/Logistics
- EDI
- SAP integration
- OPAC on mobile phones

April 20, 2012

Mary Russell
New Hampshire State Library
via Email: Mary.Russell@dcr.nh.gov

Dear Mary,

Thank you for giving LYRASIS the opportunity to respond to the NHAIS request for information on Evergreen services. We're pleased to be able to offer these answers to your recent inquiry, and look forward to discussing the needs and desires of New Hampshire's libraries further.

1. Which software would you set us up on? Koha Evergreen Other: _____

LYRASIS proposes the Evergreen ILS. Prices stated in this reply to the request-for-information are approximate and non-binding. Specific pricing will require knowledge of the nature of the libraries to be migrated, the services – particularly database migration activities – needed in the course of the migration, and operational efficiencies that can be gained by shared setup, training, and hosting.

As an organization similar to NHAIS, we are quite conscious of the sensitivity of libraries to price increases, and we walk that fine line in balancing that sensitivity with actual cost increases. We have priced this service in the context of our overall pricing expectations and needs and expect that prices if increased annually will increase annually modestly. Being precise is difficult since some of our costs are not internally controlled.

There is always the possibility that somehow our mutual expectations of your needs and our price to meet those are inaccurate or change. In that case should any major adjustment be needed to maintain our partnership, we would first talk with NHAIS and its members, and agree on a mutually acceptable approach.

2. Cost of software install and customization for the first year: \$_____

Please indicate the turnaround time for this and if it is based on a per-library amount, or a minimum number of libraries at once, or a flat-rate for the group (or whatever it is based on).

For independent, per-library instances of Evergreen, the cost for the software install and customization varies by the size of the library, and ranges from \$2,500 to \$3,500. To the extent that templates can be created for types of libraries, this per-library installation and customization cost can be reduced slightly. In general, libraries can be running an Evergreen instance in production in as little as 12 weeks, but timing is dependent on factors such as the number of simultaneous libraries being installed, the effort required to extract-transform-load records from the old ILS to the Evergreen system, and the scheduling requirements of local libraries.

Yearly application support costs (year two and beyond) are approximately \$500 to \$1,500 per library and do not vary by the number of libraries in the program.



3. Cost (per record) for data loading: \$_____

Please explain what is (or is not) included in this cost.

To determine precise migration costs we would need to work with each library to understand the system where the records are coming from and the requirements to put the records in a form for loading into Evergreen. The migration of data is broadly a three-step process – extraction, transformation, and loading – and costs vary at each of these stages. The costs for extracting information from an existing ILS installation vary depending on the capabilities and data structures of that library's existing automation system. Transformation includes manipulation of the records into the format required for Evergreen. Loading, the most minimal aspect of pricing the migration of data, involves inserting records to the library's new Evergreen installation. We would work with each of the member libraries to tailor these three steps to the library's need and price it based on the actual costs of performing the work. Migration of bibliographic, holdings, and patron records could range from \$2.50 to \$6 per 100 records. This cost does not include authority control or other manipulation of the records beyond what is required to load the records into Evergreen.

4. Annual cost of hosting our system: \$_____

If this cost will vary between the first and subsequent years, or change based on participation levels, please explain how that breakdown will work. Also, what specific services are included in hosting?

Annual hosting cost is ranges from \$3,000 to \$6,000 per year for the sizes of libraries described in your memo.

5. *Will any development be needed to implement our system? If so, please explain what will be needed and how much it will cost. Please indicate if this work is something your company would do, or if it would be contracted to someone else?*

Evergreen can often be implemented without additional software development; this can be impacted, however, by circumstances specific to the library(ies) being migrated. The migration of each library is based on its needs and timeline. Data migration, cleanup and training may be necessary before full implementation. Within the first few weeks of your decision to migrate to LYRASIS' hosted Evergreen service, we will meet to assess and propose specific migration timelines with goals and needs. If, in the course of determining the goals and needs we find that software development is required, we will work with you and your member libraries to draw up specifications for that development. Our staff will do software development.

6. *There are two different support scenarios we are considering and we would like pricing information on each.*

#1 - Your company will provide all support for set up and ongoing use of the system to all staff of all libraries in nhaisLOCAL. Please explain what support would be available and what it would cost on an annual basis for the entire group. If this is priced per library, please indicate that.

#2 - Staff here at the NH State Library would provide first level phone support for nhaisLOCAL libraries and your company would provide support to our staff (or to the staff from participating libraries whom we refer to you) for issues we cannot resolve. Please explain what support would be available and what it would cost on an annual basis for the entire group. If this is priced per library, please indicate that.

#3 - Is there another support model that you would suggest? If so, please describe it and outline the relevant costs.

Our annual costs described above presume the first scenario: LYRASIS will provide support for staff at nhaisLOCAL libraries. LYRASIS hosting clients have self-service access to 24/7 documentation support, asynchronous support via e-mail and web-based trouble ticket portal, and telephone support from 7am to 8pm Eastern Time. On call emergency support is available 24/7.

To the extent that NH State Library staff provide these functions, we will be able to reduce our annual application support costs.

We don't envision a possible third support model.

7. Depending on which support scenario we decide to go with our training needs may be different as well. Please provide pricing on each of these options.

#1 - Your company will provide training for each individual library as it gets ready to implement the system. Please explain how this training would be done (online, in-person, etc.) and what it would cost.

#2 - Staff here at the NH State Library would train each library as it implements. Your company would train us on using the system and would help us to set up a training program to use with libraries. Please explain how this training would be done (online, in-person, etc.) and what it would cost.

#3 - Is there another training model that you would suggest? If so, please describe it and outline the relevant costs.

Our installation and customization costs described above presume the first scenario. We find that training works best in an online, webinar fashion. Attendees can use the Evergreen staff client installed on their own PCs to follow along with the exercises; we have found that it is sometimes problematic to get the Evergreen staff client installed in a training classroom setup. The webinars are also recorded for refresher training of staff and to show new staff joining a library.

One way to reduce costs is to utilize NH State Library staff to train nhaisLOCAL libraries as proposed in the second option. In this case, LYRASIS would train NH State Library staff via webinar using a training database supplied by LYRASIS. It may be a copy of one of the nhaisLOCAL member databases, or it may be an entirely fictitious database. NH State Library staff would have a similar ability to consult recordings of the webinar, and LYRASIS will make copies of the training materials available to the NH State Library staff for their use in training member libraries.

We don't envision a third possible training model.

8. If this project is implemented, we want each library to have it's own online public catalog that integrates the various databases and downloadable book resources that are available to our state's citizens through their public libraries and allows the library to include their local information (blogs, social media links, etc.) on their site. What additional costs or services will be needed to get us there?

There are several possibilities here, and the implementation details depend on a more defined set of criteria. For instance, LYRASIS offers a Discovery Service that integrates search results from commercial databases and free internet resources into a single search experience with the data from the Evergreen ILS. The LYRASIS Discovery Service pages are customizable by library, and can contain links to a library's existing blogs and social media services. Alternatively, an extension of this single search experience

could be provided through Drupal, which would provide blogging and social media capabilities for the local library on the same screens that deliver search results from the Evergreen ILS and/or other various databases. Yet another option would replace the Evergreen OPAC interface with a WordPress installation that allow for both searching the Evergreen database and blogging capabilities for library staff.

We cannot provide specific pricing guidance because of the variability of options, and we would welcome the chance to meet with you to see what your needs are and what solutions can effectively match those needs.

9. What will the annual costs (separated out from implementation) be?

Annual costs are a combination of application support (question #2) and hosting (question #4). The total annual cost would be approximately \$3,500 to \$7,500 per library depending on the size of the library.

10. Are there options that we should consider that would bring down the costs of this project?

We recommend the New Hampshire State Library and the NHAIS member libraries reconsider the decision to have separate installations for each library. Our costs increase dramatically when we consider the requirements to maintain separate systems for each library: copying report definitions, data backups, operating system patches, application upgrades, and general maintenance/monitoring activities. Even using virtualization technology (as we do) to reduce the number of physical servers, the number of virtualized servers is high as is the overhead associated with running this number of virtual servers. If we could change your architecture from 70 separate installations of Evergreen (and the resulting separate virtual servers) to one or a few shared instances, the economies of scale can dramatically drive down the annual hosting costs.

We recognize that New Hampshire librarians are strongly protective of their patrons' privacy, and there are technological means other than server isolation that we can use to meet this goal. In particular, the Georgia PINES consortium created Evergreen to solve the problem of independent libraries each running their own integrated library systems. Evergreen's system architecture provides for a flexible organizational hierarchy and a rich permissions system that can provide for local control of patron, circulation, and bibliographic records. We would welcome the opportunity to discuss this option with you to create the most economical system architecture that meets the desire for local autonomy and control.

If you have any other questions regarding how Evergreen and/or LYRASIS can help New Hampshire libraries, please feel to contact me or Jennifer Bielewski (Jennifer.Bielewski@LYRASIS.org).



PETER E. MURRAY

Assistant Director, Technology Services Development