

PLS Mobile Application and Implementation RFP Questions and Answers

The following list of questions and answers have been submitted as of **5:00 P.M. on March 6, 2024** to the Peninsula Library System via the approved email procedure specified in the RFP during the question submission period. This document will be updated accordingly so that all questions and answers are contained in a single document. THE CONTRACTOR BEARS ALL RESPONSIBILITY TO BE FAMILIAR WITH ALL QUESTIONS AND ANSWERS RECEIVED UP UNTIL THE END OF THE QUESTION PERIOD.

1. *Is the deadline to submit a proposal 4 pm or 5 pm on March 18, 2024?*

Answer: The deadline is 5:00 PM PST on March 18, 2024.

2. *Is there a budget you are willing to share?*

Answer: PLS does not have set budget parameters for this project. We are interested in reviewing the proposals and their solutions, and will use the rating rubric to determine the best project that suits the needs of PLS.

3. *On BidNet, Buyer Preferences, Guidelines and Requirements states "Local Service Required". Could you elaborate on this? Will the award go to a local company?*

Answer: This was selected to indicate that services will be needed to implement the mobile app for our PLS consortia libraries. It has been removed from BidNet to minimize confusion.

4. *Hello, is this RFP specifically looking for a pre-built mobile application? Or, are you also entertaining using a custom software development company that can build it from scratch?*

Answer: PLS will consider any mobile application that could be fully functional on or around June 30, 2024, as specified in **"Section 7. Implementation and Training."** All scheduling elements should aim to have the mobile app be fully functional by June 30, 2024. Please provide a detailed explanation if this timeframe is not possible."

5. *You currently have a San Mateo County Library app maintained by "Peninsula Library System". Is there an incumbent? Is this written by the IT team? Would it be acceptable to build upon the source code of that app?*

Answer: The San Mateo County Libraries is a member of PLS, as described in the **"Peninsula Library System Profile"** section of the RFP. They currently have a mobile app provided through a contract between PLS and Innovative Interfaces, Inc. The app is a product developed by Solus, a software company, specifically for libraries. This instance

is published under the PLS developer licenses on the Apple and Android platforms. The source code of that mobile app product is proprietary software and cannot be used by another company. The seven other PLS public library member libraries do not currently have a mobile application published on any platforms.

6. *Will we write the backend for the mobile app or will your IT team give us access to your web's existing backend services?*

Answer: The backend of the mobile app will be designed and developed by the vendor. They will be given access to the library service platform (LSP) database and other PLS digital services using APIs, SIP2 and other protocols as needed. Vendors who have existing mobile app products designed for libraries are also eligible to submit proposals.

7. *Do you have an existing subscription to a single sign on service that can host account information?*

Answer: This is a public-facing mobile app and PLS does not have a single sign-on service that hosts patron account information. Patron account authentication is managed through the LSP.

8. *Are there any preferences for local businesses?*

Answer: Preference will not be given based on the location of the business providing the mobile app.

9. *Were PLS libraries using a previous mobile app?*

Answer: Yes. The PLS public libraries have used mobile apps from Boopsie, Communico and Innovative Interfaces, Inc.

10. *Is PLS open to a proposal for a package that includes a new discovery platform to replace BiblioCore and a companion mobile app?*

Answer: This RFP is solely for a mobile app. PLS has no intention at this time to replace its discovery later. Should a vendor wish to provide further information about other products as part of a response to this RFP, they may do so, but availability of any additional modules will not be considered as part of the RFP ratings.

11. *Are proposals submitted through BidNet considered valid proposals?*

Answer: All prospective bidders should follow the directions listed on the RFP to submit a bid. No bid submitted through BidNet, or in any other method other than what is described in the RFP, will be considered.

12. *We would like to request a two-week extension to April 1.*

Answer: The RFP closes on March 18. PLS reserves the right to extend the RFP submission deadline for all vendors, if it is deemed necessary for any reason, but cannot accommodate requests for extensions from individual vendors. Therefore, we will not accept any bids that are submitted past the stated closing date.

13. Are you able to share why you are choosing not to utilize the existing relationships with current technology vendors that seemingly satisfy all the requirements you're asking for?

Answer: The PLS Purchasing Policy requires that an RFP be issued for services above a certain monetary threshold.

14. Can you provide any API or platform documentation for your backend platforms (BiblioCore, Sierra) to help refine what we can provide/feature availability?

Answer: Below are links to publicly available API documentation for Sierra (Innovative) and BiblioCore (BiblioCommons). Should a vendor choose to build a new mobile app and is awarded the contract, more detailed documentation would be provided, if needed.

Sierra API Documentation: <https://techdocs.iii.com/sierraapi/Content/titlePage.htm>

BiblioCommons Schedule A-1 BiblioCore Service Description:
<https://www.bibliocommons.com/schedule-a1-bibliocore>

15. Are patrons from one library system (example: Redwood City PL) eligible to register for programs and events that are being hosted by one of the other library systems (example: San Mateo City Library)?

Answer: Yes, library programs and events are open to all community members and do not require proof of residency or a library card for registration.

16. The RFP calls out only Barcode for patron self-check. Please confirm that there is currently no requirement for RFID patron self-check.

Answer: Self-checkin and self-checkout functions are not required but are Desired Features (see "Section 2: Desired Features"). The RFP does not specify a preference for barcode or RFID checkout capabilities. PLS primarily uses RFID technology for materials checkout at all library locations.

17. Is there any incumbent for this opportunity?

Answer: No, please refer to the answer for questions #5 and #9.

18. If there is an incumbent then why you are looking for other companies? Are you not happy with them?

Answer: Please refer to the answer for questions #5 and #9.

19. If there is an incumbent then are they bidding for this opportunity?

Answer: Please refer to the answer for questions #5 and #9. All vendors are welcome to submit responses to the RFP.

20. Are you looking for Commercial Off-The-Shelf (COTS) solutions exclusively, or are you open to exploring custom development options as well?

Answer: Please refer to the answer for question #4.

21. What is the length of the contract for this RFP?

Answer: PLS does not have a set contract length for this project. Please refer to "Section 9: Pricing Structure" for contract terms required in the proposal.

22. The solicitation document lists two different times for the proposal deadline: Page 1 lists 4:00pm and page 9 lists 5:00pm. Could PLS confirm which is correct?

Answer: Please refer to the answer for question #1.

23. One stated desired feature is that the app support check in of library items. Could the Library specify whether this is physical library materials and give an example use-case of when this would be desired?

Answer: This feature would enable patrons to use the mobile app to check in physical materials that are checked out on their account. Patrons would use this feature only when physically at a library location. Possible use cases include patrons who bring checked out materials back to the library and use the mobile app to check them in and patrons who are browsing the shelves, check out materials to themselves using the app, change their minds and check in the items to remove them from their account.

24. In terms of self-check, we provide both RFID self-check for libraries with RFID security gates and barcode self-check for libraries without security gates. Could PLS clarify which types of security gates are currently in place for each library within the consortium, and if a library is using tattle-tape gates, please indicate that as well?

Answer: PLS uses Feig gates provided by Envisionware and Bibliotheca. PLS does not use any tattle-tape gates.

25. Can patrons borrow from all member locations? (For example, could a patron of Member A visit and checkout items at Member B)

Answer: Yes, patrons can borrow materials from all member libraries. The scenario described in the question is accurate.

26. Do items in library collections float across member locations, or do they return to their home library? (For example, if a member checked out an item from Location A and returned the item to Location B, would it stay at Location B or return to Location A?)

Answer: The majority of library jurisdictions do not float materials among the library jurisdictions or between their branch locations. However, the San Mateo County Libraries do float materials among their branch library locations (e.g., materials checked out from Atherton Library and checked in at Belmont Library stay at Belmont and are not routed to be returned to Atherton). No other PLS members float library materials or retain floating materials from the San Mateo County Libraries (e.g., materials checked out from Atherton Library and checked in at Burlingame Library are routed back to Atherton).

27. How do your library members identify circulating items? (For example, do all items have printed barcodes, RFID tags, RFID tag with printed barcode)

Answer: All items have printed barcodes with the library jurisdiction's name and RFID tags.

28. Do all members use the same types of barcode or RFID? (For example, all the same barcode formats—Codabar, CODE39—or use RFID tags with the same data encoding standards)

Answer: All PLS libraries use the same type of barcode (Codabar symbology with a Mod-10 check digit). PLS materials use a variety of RFID encoding formats, including: TechLogic Item (Custom Data Model), ISO Object Item (DM170 or 28560-2), and 3M Numeric Item (DM133).

29. Is a security detection system in place at all member locations, or only some?

Answer: Security detection systems are in place at some member library locations.

30. If a security detection system is used at some or all locations, which kind of system is used? (For example Electromagnetic—EM, Tattle-Tape—or RFID AFI, or RFID EAS.)

Answer: Security gates use RFID AFI systems (3M AFI and ISO AFI).

31. We understand that the PLS solution would have at least 2 types of users: patrons and library admins/staff. Would the proposed solution include a single mobile app with 2 different contexts, or a separate app (web or mobile) for library admins/staff?

Answer: PLS is looking for one app that both patrons and staff will use with backend administrative functionality that only staff would access via web and/or mobile app.

32. Please validate our assumption that the APIs needed for catalog management, check-in/out, etc., would be readily available during development and these would be made available to the mobile app.

Answer: Please refer to the answers for questions #6 and #14.

33. Please validate our understanding on patron account management:

a. Transactional operations like check-in/out, place a hold, etc. would be achieved using APIs to communicate with the Sierra database.

b. Patron details like name, phone number, address, etc. are completely managed by the proposed app, which may or may not need to be communicated to the Sierra database.

Answer:

- a. Transactional operations (e.g., checkout, checkin, placing holds, etc.) can be achieved using APIs and SIP2 protocols.
- b. Patron data, including personally identifiable information (PII), is stored and managed by Sierra, not by the app. The app must communicate with Sierra to authenticate and retrieve patron data as necessary using APIs and/or SIP2, ensure secure connections and data transfer, and must not store any patron or item data.

34. How will patrons be registered into the proposed app?

a. Option 1: Patrons register themselves on the app and will undergo an approval process by a admin.

b. Option 2: Patrons are added to the system by a library staff/admin using the proposed app.

c. Option 3: Patrons are added to the system by a library staff/admin using an external app.

Answer: Patrons will be able to download and use the app without registration. Patrons with an existing library card will be able to use circulation and account management functions in the app immediately by authenticating their library account with their library barcode number and PIN, which is stored in the LSP (Sierra). The app will communicate with Sierra to authenticate the patron's account status and retrieve account data.

- a. Option 1 Answer: A patron does not register themselves to use the app. Their access to the app will be without validation and they can search or browse the resources. To place a hold or use account management features, patrons will need to 'log in' and authenticate their account using their library card barcode and PIN.

- b. Option 2 Answer: By 'system' it is assumed that you mean the app. Patrons are not added to the app by a library staff/admin. Should a patron not have a library card, they must go to the library's website or visit a library to obtain a library card.
- c. Option 3 Answer: By 'system' it is assumed that you mean the app. The answer is the same as the answer to Option 2.

35. How many cards can a patron have per library?

a. Will the proposed app have capabilities for the library staff to generate new library cards for patrons?

Answer: Each patron has one library card, issued by one of the PLS library jurisdictions. This card is used interchangeably at all PLS libraries to borrow materials and access eResources.

- a. Registering for new accounts and receiving new library barcode numbers is not done within the app. Please refer to the answer for question #34 for more detail.

36. Calendar event creation: What are the types of events that typically involve patrons? A few examples would help our understanding.

a. Would the library admins need to create these events in the proposed app manually? Alternatively, would it be possible for external systems to create events in the proposed app if APIs are made available?

Answer: Library events are conducted in-person and online, and not all events require registration. PLS libraries host a wide variety of community-focused programming. Please visit any PLS library's website for specific examples of library events and programs.

- a. PLS libraries use various systems for scheduling, registration and management of library events. Whenever possible the app should use standard communication protocols to connect to these external systems for event creation and management. If that is not possible, library staff would be expected to manually create and manage events within the app. Please refer to "Section 1: Priority Features, Item 1.10" and "Section 2: Desired Features, Item 2.7" in the RFP.

37. For library staff, would a single sign-on mechanism be needed with BiblioCore?

Answer: A single sign-on solution is not required for integration with BiblioCore.

38. Please validate our assumption that payments would be handled at PoS (libraries) and be out of scope for the proposed solution.

Answer: Yes, payments are out of scope for this RFP.

39. PLS delivery system: Would the delivery location just be libraries, or would we need to support curbside pick-up as well?

Answer: The app is not required to support curbside pickup.

40. For indoor maps of libraries: would an image-based guidance system work?

Answer: Image-based guidance mapping can be considered and specifics on implementation and maintenance of the images should be listed in the proposal.

41. Will e-resource listings be loaded and accessed similar to the other items on the catalog?

a. Is the rendering of different types of e-resources (like a digital or an audiobook) in scope?

Answer: eResources that are checked out to patrons (e.g., eBooks, eAudiobooks, eMagazines and streaming video) appear in the catalog, and are browsable and searchable like physical items.

- a. Other eResources (digital resources and databases) provided by third-party vendors do not appear in the catalog and would be accessed through links to the external resources.

42. Is the app launch date of June 30, 2024 fixed, or based on the overall work involved, is there flexibility to this date?

Answer: Please refer to the answer for question #4.

43. As per the scope the Mobile APP should be branded by individual jurisdictions, in that case, can you please let us know the number of jurisdictions, is that per city within the county that is 9 or something different. Can you please provide the details.

Answer: Please refer the “Peninsula Library System Profile” section in the RFP, which lists the member library jurisdictions, the “2023 - Population Served by PLS Public Libraries” which lists all the public libraries included in the RFP, and the “PLS Organizational Structure and Technology Services” section which notes that the college district is not included in the RFP.

44. Since the Mobile APP should be configured for each of the jurisdictions, we assume that we need to follow SaaS based model as each and every library will have its own database on books and users. Please correct us and provide more details.

Answer: The assumption in the question that a SaaS based model for each library’s own database is not accurate. The PLS public library jurisdictions share one database (Sierra) which includes all patron, item and circulation data for each jurisdiction. Please refer to the answer for question #33 for more details on database structure and communication with the app.

45. We assume that SaaS Mobile APP will be managed from a management console section, which will be a Web Application with Authentication and Authorization privileges set up. Please correct us and provide more details.

Answer: Clarification about a SaaS based model is provided in question #44. A management console would be required, with authentication and authorization privileges for a system administrator and for each library. This should include statistics and usage data, broken down by library jurisdiction, and also aggregated, with downloadable reports.

46. Access Sierra Database will be through API. Please let us know if the same DB is used across all the cities and counties, irrespective of the data. Please correct us and provide more details. And, we assume that we would be given access to the database as well.

Answer: Please refer to the answers for questions #6, #14, #33 and #44.

47. Is there any barcode system in place, if so, please provide the details.

Answer: Please refer to the answers for questions #16, #27, #28 and #34.

48. PLS libraries use event booking software like EventBrite, FaceBook, LibCal, Zoom, Acuity and others. Assume that we will be given developer access to these accounts to get it integrated?

Answer: PLS libraries will provide developer accounts with third-party providers to facilitate integrations with the mobile app as needed whenever possible. Please refer to the answers for question #36.

49. Can you provide more insights into the specific demographics and user profiles of your patrons, particularly those most affected by the digital divide, to better understand their needs and preferences for the mobile application?

Answer: PLS is committed to equitable access as it relates to the digital divide, access to technology and offering services in multiple languages. To that end, understanding if a vendor can offer a mobile app in multiple languages and review of the app if it is intuitive to use and navigation addresses ADA requirements. Community demographics are readily available using internet searches from data aggregators, census data and the California State Library.

50. Regarding Priority Feature 1.1, could you elaborate on the level of customization required for each individual library jurisdiction in terms of branding, statistics, and configuration within the mobile app?

Answer: Libraries prefer to use their own city or library logo and color schemes, rather than a unified branding for all library jurisdictions. Other customization might include the ability to have their own alerts or messages (e.g., library closures, surveys, etc.;

please see questions #53 for more information). It is imperative that a user can choose their library jurisdiction, and that the app is able to provide statistical usage information by library jurisdiction as well as aggregate PLS system-level data, with downloadable reports. Some libraries may have subscriptions to specific resources which are not shared by all libraries (e.g., Ancestry, Boundless,), so those resources would be configured to show up on their individual instance.

51. For Priority Feature 1.3, accessing the Sierra database via APIs, are there any specific security protocols or authentication mechanisms that must be adhered to ensure patron data privacy and system integrity?

Answer: All Sierra API communications are encrypted with TLS/SSL. The available protocols include: All SSL protocols, TLS v1, TLS v1.1 and TLS v1.2. Please refer to the answer for question #14 for publicly available API documentation.

52. How critical is real-time catalog searching and updating database records for your patrons? Are there any specific performance benchmarks or response time requirements for these functionalities?

Answer: Catalog searching and updates to database records must be done in real-time. PLS has not established specific response time benchmarks but the response time in executing tasks and retrieving data from the database is an important factor in the mobile app's usability. The vendors response should include response times for executing basic tasks within the app.

53. Could you provide examples of the types of messages or alerts that would be posted system-wide or within specific jurisdictions using Priority Feature 1.8?

Answer: System-wide messages can include notices of scheduled downtime for app or database maintenance, interruptions to access of library services, or library closures. Library-specific messages can include notices of changes to library hours, locations or closures, promotions of library services, collections or programs, or social media posts.

54. Regarding Priority Feature 1.9, besides English, Spanish, and Chinese Traditional, are there any other languages frequently spoken within your patron community that you would like to be supported by the mobile app?

Answer: Other frequently spoken languages within our community include (but are not limited to): French, Hindi, Japanese, Korean, Russian and Tagalog. English, Spanish and Chinese Traditional are supported in the LSP (Sierra).

55. How do you envision the administrative backend module described in Priority Feature 1.11 facilitating efficient management and coordination among the PLS consortia libraries?

Answer: Please refer to the answer for questions #45 and #50. The backend module must also provide methods for configuring any integrations included in “**Section 3: Integration with Other eResources**” in the RFP.

56. For Desired Feature 2.2, checking out materials via the app, are there any specific security measures or validations required to ensure the integrity of the borrowing process?

Answer: Please refer to Questions #33 and 51 for details. Information about data retention and patron privacy can be found at <https://plsinfo.org/pls-policies/>

57. Regarding Desired Feature 2.5, personalized notifications based on patron interests, could you provide examples of the type of user data used to personalize these notifications and how it will be collected and managed?

Answer: One example might be an opt-in feature where patrons would select from a list of topics or keywords and receive a notification when new items matching that criteria were added and available in the catalog.

58. Could you elaborate on the integration requirements with other eResources listed in Section 3, particularly in terms of access control and data synchronization with the mobile app?

Answer: Access to eResources is managed through the LSP (Sierra) or a third-party authentication service (EZproxy) by authenticating the patron’s account using the patron’s library barcode and PIN. Content is provided by the external vendor and data synchronization is not necessary.

59. How important is adherence to ADA accessibility requirements and WCAG guidelines for your mobile app project, and are there any specific accessibility features or functionalities you prioritize?

Answer: Accessibility is very important to PLS as we seek to serve all community members equitably. Please refer to the “**Evaluation Criteria**” in the RFP for how these features will be scored relative to other requirements.

60. Regarding Technical and Security Requirement 5.3, could you specify any additional cybersecurity measures or standards beyond industry best practices that you expect the mobile app to comply with?

Answer: PLS expects cybersecurity measures to be in alignment with the industry’s best practices. Please also see information about patron privacy in question #56.

61. How do you envision the implementation process and timeline for rolling out the mobile app across all PLS public libraries, considering factors such as data migration, testing, and staff training?

Answer: PLS does not anticipate a large-scale migration of data. Please refer to “**Section 7: Implementation and Training**” for specifics on what should be included in the proposal and the expected timelines for implementation, training and rollout.

62. What level of ongoing maintenance and support would you anticipate for the mobile app post-implementation, particularly in terms of software upgrades, issue resolution, and user support?

Answer: The vendor should provide a detailed response with information about their organization’s expected software update process and schedule, issue resolution methods and response times, and the user support made available post implementation. Please refer to “**Section 8: Ongoing Maintenance and Support**” in the RFP.

63. Could you provide more insights into the preferred pricing structure or model for the mobile app project, considering factors such as usage, population served, and budgetary constraints over a 3-4 year period?

Answer: Please refer to “**Section 9: Pricing Structure**” for all the requirements to be included in the proposal.

64. Which mobile platforms are expected to be released by the target release date? Apple, Android or both?

Answer: Mobile apps on the Apple and Android platforms must be released simultaneously.

65. Do you have a preference for the technology stack used? Native, React Native, Flutter?

Answer: PLS does not have a preference for the technology stack used for mobile app development.

66. For Library specific data such as library accounts, user accounts, books and resources that are available for check out etc. Is this data available via an API or server we will have access to? I see the resources listed in the RFP but I wasn't sure if these were only public information or public and private information (data) we would have access to during the implementation.

Answer: Please refer to the answers for questions #6, #14, #33 and #44.

67. I see there are 8 libraries and you requested a suite of apps (one app per location). I just wanted to confirm, this is one app per location, or You wanted one app, with the user settings their preferred location and the one app with dynamically change depending on the preferred location?

Answer: PLS does not have a preference for a particular design approach. The app or apps must meet all the requirements specified in the RFP.