CITY OF
SAN JOSE
CAPITAL OF SILICON VALLEY

Memorandum

TO: HONORABLE MAYOR
AND CITY COUNCIL

FROM: Julia H. Cooper

SUBJECT: SEE BELOW

DATE: April 2, 2019

Approved _(signature)_ Date 4/9/19

SUBJECT: **REPORT ON REQUEST FOR PROPOSAL FOR A LIBRARY DISCOVERY LAYER**

RECOMMENDATION

Accept the report on the Request for Proposal and adopt a resolution authorizing the City Manager to:

a. Execute an agreement with BiblioCommons Inc. (Toronto, ON) for the purchase and implementation of a Library Discovery Layer, including software subscriptions and professional services for implementation, configuration, project management, training, and ongoing support and maintenance for an initial two-year term beginning on or about May 1, 2019 and ending April 30, 2021, with a maximum compensation not to exceed $243,734 during the initial two-year term and subject to the appropriation of funds; and

b. Negotiate and execute amendments and change orders as may be required for any unanticipated changes to the City's requirements for a contingency amount not to exceed $60,000 during the initial two-year term, subject to the appropriation of funds; and

c. Exercise up to five additional one-year options to extend the agreement through April 30, 2026 for ongoing software subscriptions, support, maintenance, and related professional services, subject to the appropriation of funds.

OUTCOME

To facilitate and enhance customer access to the City of San José Library Department's information and offerings through the effective use of current technology.

BACKGROUND

The San José Public Library Department ("Library") is comprised of 24 branches throughout the City, serves over one million customers, receives over three million website visits, and checks out over 500,000 eBooks and eResources to its customers each year. Use of the Library's online services has continued to increase each year and is projected to continue.

A discovery layer is a search interface for users to search the Library's online offerings, including materials, content, and events. The current search tool used by Library customers is keyword based. Keyword searches do not distinguish between the keyword, the meaning of the word, or the intent of the search. This results in searches taking significantly more time, leading to frustration; oftentimes, the sought-after information is not even found.

Therefore, the Library would like to enhance customer access to their offerings by providing an "intelligent" search experience through a discovery layer based on natural language processing. Natural language processing is a more efficient and effective method for information search as it utilizes technology that understands what users are seeking rather than technology that confines its search to specific keywords.

In addition, a new and "intelligent" discovery layer would provide features that support conversations and community engagement not available with the current search tool. Library customers and staff would be able to create and share booklists, ratings, and reviews, providing an opportunity to connect with other users. Additionally, the San José community will be able to access and respond to booklists, ratings, and reviews contributed by customers and staff at other libraries using the same software. The opportunity for local connections would extend beyond the materials traditionally provided in the library catalog, allowing the ability to include blog posts and in-person library events among the search results.

ANALYSIS

In 2018, a Request for Proposal (RFP) for a Library Discovery Layer was published on the City's e-procurement system. Two proposals were received prior to the submittal deadline.

Evaluation Process: Proposals were evaluated and scored independently by a three-member evaluation team from the Library. Staff then conducted a Best and Final Offer (BAFO) to make clarifications and obtain final pricing.

Evaluation scores are summarized below:

	Maximum Points	BiblioCommons Inc.	EBSCO Information Services
Experience	15	10	6
Project Approach/Schedule	15	11	8
Technical Capabilities	50	37	33
Cost (BAFO)	10	2	10
Local Business Preference	5	0	0
Small Business Preference	5	0	0
TOTAL	**100**	**60**	**57**

Local and Small Business Preference: In accordance with City policy, ten percent of the total possible evaluation points were reserved for local and small business preference. No proposers requested consideration for the preference; therefore, the preference was not a factor in the final outcome.

Protest: The RFP process included a ten-day protest period that commenced when the City issued the Notice of Intended Award. No protests were received.

Award Recommendation: The City recommends award of contract to BiblioCommons Inc. ("BiblioCommons") as the most advantageous and best value proposal per the evaluation criteria set forth in the RFP. Their proposal met or exceeded all of the RFP specifications, and their solution was rated superior in the following key areas:

- Extensive experience, knowledge, and expertise deploying the proposed solution at other public libraries nationwide.
- Expanded search capabilities, including advanced filtering options.
- Significantly more responsive search results, formatted and delivered in a highly effective manner that follows leading industry standards.
- Product focus is on "shared user experience" and "commitment to helping public libraries thrive in this digital age."
- Superior social interaction features (ratings, reviews, booklists, tags).
- Use of iterative design process that assures frequent updates and new features.

Staff conducted reference checks with the Boston Public Library, the Columbus Metropolitan Library, and the King County Library System. All references checked were positive.

Summary of Proposed Agreement: The agreement with BiblioCommons includes fixed pricing for software subscriptions and professional services for implementation, configuration, project management, training, and ongoing support and maintenance for the initial two-year term. The agreement also includes a detailed scope of services, a general project plan, and a compensation schedule with milestone payments tied to the successful completion of key project deliverables.

Following implementation, the City will review the implemented system to determine if it is ready for final system acceptance. Final system acceptance will trigger release of retainage held on implementation deliverables. Following the implementation period, the software will be supported by ongoing technical support and maintenance services.

The agreement includes provision for five additional one-year options to extend the agreement for ongoing software subscriptions, support, and maintenance.

EVALUATION AND FOLLOW-UP

This memorandum will not require any follow-up from staff.

PUBLIC OUTREACH

This memorandum will be posted on the City's website for the April 23, 2019 City Council meeting.

COORDINATION

This memorandum has been coordinated with the Library Department, the City Attorney's Office, and the City Manager's Budget Office.

COMMISSION RECOMMENDATION/INPUT

This item does not have input from a board or commission.

FISCAL/POLICY ALIGNMENT

This action is consistent with the Council-approved budget strategy for the effective use of technology.

COST SUMMARY/IMPLICATIONS

1. AMOUNT OF RECOMMENDATION (2-year initial term)   **$243,734**

2. COST ELEMENTS:

- Software Implementation (~ 30 weeks), including project management, implementation, design, configuration, training, testing, and go-live	$46,067
- Year 1 Annual Subscriptions, Support, and Maintenance	$98,833
- Year 2 Annual Subscriptions, Support, and Maintenance	$98,834
Subtotal	**$243,734**
Contingency	$60,000
TOTAL	**$303,734**

1. SOURCE OF FUNDING: Funds for this service delivery enhancement are provided for by the Library Parcel Tax – Automation appropriation.

2. FISCAL IMPACT: This service delivery enhancement is in alignment with the 2018-19 Proposed Capital Budget. The Operating Library Parcel Tax Fund will fund the total ongoing annual subscriptions, support, and maintenance cost beginning of Year 3.

BUDGET REFERENCE

The table below identifies the fund and appropriation proposed to fund the contract recommended as part of this memorandum.

Fund #	Appn #	Appn Name	Current Total Appn	Amt for Contract*	2018-2019 Capital Budget Page	Last Budget Action (Date, Ord. No.)
483	4083	Automation Projects	$1,280,000	$303,734	V-245	10/16/2018, 30124

* Amount for Contract reflects initial term costs of (1) $46,067 for implementation, (2) $197,667 for years 1 and 2 subscriptions, maintenance, and support, and (3) $60,000 for contingency.

CEQA

Not a project, Public Project Number PP17-003, Agreements/Contracts (New or Amended) resulting in no physical changes to the environment.

/s/
JULIA H. COOPER
Director of Finance

For questions, please contact Jennifer Cheng, Deputy Director of Finance, at (408) 535-7059.