# MOBIUS ILS RFP Working Group

## CHARGE

**Adopted:** May 25, 2021

**Revised:** N/A

**Replaces:** N/A

### Type of Group:

Working group

### Charge:

As a successful multi-type library consortium heading towards our silver anniversary, MOBIUS is exploring the future of our consortium and evaluating the best way to move forward for all of our libraries. Provision of an ILS platform and resource sharing system remain our primary goals.

The MOBIUS ILS RFP Working Group is charged with developing and issuing an RFP for an ILS and resource sharing system, and with evaluating RFP responses and developing a recommendation for the MOBIUS membership and Board. Input from constituents is essential to the successful outcome of the RFP process. The working group is expected to develop and use a communication plan which should include regular communication and information gathering through a variety of methods and venues to ensure that all constituents have a voice in the process.

### Goals for the ILS RFP project:

* MOBIUS will select an ILS platform that meets the needs of all types of constituent libraries (public, academic, special, etc.)
* MOBIUS will select a system for resource sharing among disparate systems. The ability to connect with standalone members is critical. Connection to Prospector is critical.
* The selected ILS and resource sharing system will provide a quality user experience for patrons and staff. They will offer support and integration for electronic resources and Open Access/Open Educational Resources (OERs). They will be stable, secure, and well-supported. There will be a clear development path and opportunities for growth with these systems.
* Cost containment is a key factor for many of our constituents, and the cost-effectiveness of proposed solutions must factor into the evaluation process. In addition, vendors should be asked to provide a financial model that will allow for additions and departures of libraries.

### Major expectations of the ILS RFP Working Group:

* With input from constituents, develop and issue an RFP according to the timeline below.
* With input from constituents, develop a matrix for evaluating RFP responses.
* With input from constituents, analyze RFP responses and develop a recommendation for the MOBIUS membership and Board according to the timeline below.

### Statement of reporting structure:

The ILS RFP Working Group will submit drafts of the RFP and evaluation matrix, and a final recommendation regarding selection of vendor to the MOBIUS membership and Board of Directors for approval.

### Membership:

All staff at MOBIUS member libraries and in the MOBIUS Consortium Office (MCO) are eligible for membership. Roles of working group members are as follows:

* ***Co-chairs (2)*** - Selected from the membership, the co-chairs will lead and coordinate the RFP process. The co-chairs will be responsible for identifying major areas of functionality, inviting volunteers from within the working group to serve on functional teams, and coordinating with the functional teams.
* ***MCO Executive Director (ex-officio)*** - Responsible for vendor communications and contract negotiations, and for participating in the work of the working group.
* ***MCO Associate Director, Member Services (ex-officio)*** - Responsible for sharing knowledge about the consortium to inform the activities of other working group members, for participating in the work of the working group, and for writing the initial RFP draft.
* ***MCO Help Desk staff (3)*** – Responsible for sharing knowledge about the consortium to inform the activities of other working group members and for participating in the work of the working group.
* ***Additional working group members (10)*** - Selected from the membership, the additional working group members will serve on two-person teams responsible for major functional areas. These working group members will be responsible for gathering and coalescing input from the membership on their assigned functional areas, and with using this input to assist with writing the RFP and evaluating responses.
* ***MOBIUS Board representative (ex-officio)* –** Responsible for communication between the working group and the MOBIUS Board.

### Member qualifications:

Working group members should have experience with one or more functional areas of ILS or resource sharing systems. Knowledge of additional ILS or resource sharing possibilities is desired but not required.

### Membership Restrictions:

None

### Frequency of Meetings:

Membership on the working group will be an 18-month appointment: July 1, 2021-December 31, 2022. Members should expect to meet at least monthly. Weekly meetings may be required during the RFP-writing phase at the beginning of the appointment, and the evaluation and decision phase near the end of the appointment.

Initial meetings will take place online, with locations for later meetings to be determined by the working group membership in accordance with local and state regulations and the ability of working group members to travel.

### Group Discussion List:

Team communication space will be provided by MCO, most likely through Slack. Private channels will be created for the work of the working group, and public channels will be developed for the membership and the working group to communicate and share information.

### Communication of the Group Minutes

Minutes of the meetings must be posted within 30 days of each meeting.

### Output:

The ILS RFP project will follow the timeline below. Key deliverables for the ILS RFP Working Group include:

* Provide draft of RFP and evaluation matrix to MOBIUS membership and Board: 11/1/2021
* Provide recommendation for selection of vendor to MOBIUS membership and Board: 11/1/2022

### ILS RFP Project Timeline:

* Late March/Early April, 2021 – Initial vendor conversations & virtual meetings
* Summer/Fall 2021 – Develop RFP
* 11/1/2021 – ILS RFP Working Group provides draft of RFP and evaluation matrix to MOBIUS membership and Board
* 11/15/2021 – MOBIUS issues RFP
* 12/3/2021 – Deadline for vendors to ask questions about the RFP
* 12/17/2021 – Deadline for MOBIUS to issue a response to vendor questions
* 2/1/2022 – Deadline for vendors to return RFP
* Late March/early April 2022 – Product demonstrations
* Late Summer/Fall 2022 – Final demonstration and clarifications
* 11/1/2022 – ILS RFP Working Group submits recommendation to MOBIUS membership and Board
* Late Fall 2022 – Decision made and contract negotiations occur
* 2023 – Implementation and training
* Spring 2024 – Go live on the new system