Request for Proposal
Pennsylvania Integrated Library System (PaILS)

Contact
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Background
PaILS is a consortium of over 80 libraries in Pennsylvania. It was established in 2011 and manages a shared Integrated Library System named SPARK. SPARK runs on the open source Evergreen ILS software. PaILS is operated by an independent 501c3 non-profit corporation with a nine person Board comprised of members of the Pennsylvania library community. It has two staff members, an Executive Director and the SPARK Systems Coordinator. Funding is a mix of LSTA, allocated through the state agency Office of Commonwealth Libraries, and membership fees. Membership is voluntary. PaILS manages all aspects of the SPARK ILS including hosting, migrations, support, training, administration, and enhanced content. Hosting, migration management, and most training are outsourced to Equinox. Some administrative functions, such as billing, bookkeeping, and payroll, are outsourced to the Pennsylvania Library Association.

Statistics (2015 Year End):

Total Patrons 556,953
Total Org Units (Outlets With Either Patrons Or Volumes) 80
Total Bib Records 1,286,147
Total Call Numbers 2,813,264
Total Copies 2,725,524
Total Circulations 3,530,224
Total Holds 257,796
Total Transits 436,334
Total Hold Transits 152,441

The beginning years of SPARK were challenging, marked by hosting problems and changes in leadership at the state level. In 2013 PaILS changed hosts and, since then, has seen continuous growth, a renewed level of confidence in the SPARK brand throughout the state’s library community, and strong support from the state agency that oversees library services in Pennsylvania.

Now that SPARK has attained and can maintain technical stability and new and larger libraries are joining the system, the Board of Directors agrees that the PaILS Mission
Statement needs to be reevaluated, a Vision Statement needs to be formulated, and strategic priorities need to be developed and executed. Ongoing challenges include the need for stable funding, meeting the disparate needs of a diverse group of libraries, the need to fix PaILS's position in the firmament of PA library networks, demands for providing new services and features with limited resources, and the expectation that PaILS must leverage the advantages of open source software. The strategic questions under consideration may include, but are not limited to:

1. Current membership mainly consists of small and medium-sized public libraries. Should PaILS actively pursue K-12, academic, special, and/or very large public library systems?

2. Currently, end users of SPARK and staff members, excluding catalogers, may not be aware that their library is part of a shared ILS. Searching is scoped to the local libraries' holdings, branding is geared to the local library, and resource sharing is not practiced beyond the confines of individual library systems. Is the status quo acceptable or should PaILS pursue a different direction?

3. How does PaILS supplement LSTA grants and membership fees with other funding sources?

4. PaILS has opted to limit the number of paid staff and outsource functions like accounting, training, payroll, software development, and 2nd Tier Tech Support. Which, if any, of these functions should be performed by individuals who are direct employees of PaILS?

Requirements

The Consultant must have familiarity with library governance and funding models, be conversant with library automation software and current trends in library automation, have previous experience working with library systems of various sizes, and have access to research and other information pertaining to similar statewide and large library technology consortia.

Scope of Work

The Consultant shall:

1. Recommend, develop, execute and manage the strategic planning process which would include at a minimum:
   a. an environmental scan which would include (but not be limited to):
      i. input from relevant stakeholders as well as other entities which may affect the ability of PaILS to achieve its goals. Stakeholders should
include PaILS staff, PaILS Board Members, staff and administration in member libraries, Office of Commonwealth Libraries, other Pennsylvania library networks, key Pennsylvania libraries that are not members, and other stakeholders.

ii. Insights from data gathered about similar types of organizations in other states
   b. an assessment of PaILS’s current infrastructure which would include (but not be limited to):
      i. Staffing complement
      ii. Financial health
      iii. Technical infrastructure
      iv. Business processes
      v. Board operations

2. Lead the PaILS board/staff through:
   a. the creation of a Vision Statement
   b. the review and possible revision of the organization’s Mission Statement

3. Provide the PaILS board/staff with an analysis of the data generated by the environmental scan and the internal assessment.

4. Lead the PaILS board/staff through the development of strategic priorities/goals along with measurable objectives.

Proposal Requirements

1. Proposal must be submitted in PDF format via email to Scott Thomas, Executive Director, Pennsylvania Integrated Library System. The address is: 
   scott.thomas@sparkpa.org

2. Deadline: Wednesday, April 6th at 5PM

3. Specific proposal contents:
   a. Name of firm
   b. Name and contact information for the consultant(s)
   c. Description of experience and qualifications
   d. Indication of availability during project period
   e. Statement of work: brief response on approach to the project scope
   f. Cost proposal, including hourly rate structure
   g. At least three references

Deliverables /Schedule

Contract Awarded: April 12, 2016

Project Begins: May 1, 2016

Lead Board through Assessment of Mission Statement and Development of Vision Statement: July 26, 2016 (Annual Board Retreat)
Assessment and data from other consortia and stakeholders due: August 31, 2016

Final Report Due: October 31, 2016
1. Cover Page
2. Executive Summary
3. Body of the Strategic Plan
   a. Background of project and assessment
   b. Description of methodology used for assessment
   c. Assessment findings and recommendations
   d. Mission and Vision Statements
   e. Recommended strategic priorities.
4. Appendices

At the request of the PaILS Board of Directors, the Consultant will provide an in-person presentation of all findings and recommendations at a date and time mutually agreed upon by all Parties. The Consultant must also be able to attend a meeting of the board on July 26, 2016 in State College, Pennsylvania.

Payment Terms
Payment terms will be agreed upon by both parties at the time an agreement is signed.