



To: Toronto Public Library Board – July 15, 2002

From: City Librarian

Subject: **Web-Based Services: Single Search Interface and Remote Customer Authentication and Authorization – Award of Proposal**

Purpose:

To advise the Toronto Public Library Board of the result of the Request for Proposal for Web-based Services: Single Search Interface and Remote Customer Authentication and Authorization and to request authority to enter into negotiations and award of the resulting contract to the recommended proponent.

Funding Implications and Impact Statement:

All dollar amounts in this report include applicable taxes less the Municipal Goods and Services Tax Rebate.

The resulting contract will have a total value of \$731,588 which includes the purchase, implementation, training and support costs over five (5) years and will be funded from the Remote and Personalized Services capital project. Annual software support costs beyond the five years of this contract will be negotiated with the vendor and incorporated within the Library's operating budget.

Additional costs for the purchase of hardware and annual hardware support will have a total value of \$69,000 over five (5) years.

- The one-time purchase of hardware of \$66,600 will be funded from the Remote and Personalized Services capital project.
- The annual hardware support costs of \$1,200 for years four (4) and five (5) totaling \$2,400 will be accommodated within the operating budget.

The total cost of the Single Search Interface and Remote Customer Authentication and Authorization, including the purchases, implementation, training and on-going support costs, over a five (5) year period is \$800,588 and is to be funded from the capital budget (\$798,188) and the operating budget (\$2,400).

Recommendation:

It is recommended that the Toronto Public Library Board grant authority to appropriate Library officials to commence negotiations with and, if successfully concluded, enter into an Agreement with A-G Canada, for the supply, delivery, installation, implementation and support of a single search interface and remote customer authentication and authorization system, at a net cost not to exceed \$731,588, net taxes included, based on A-G Canada being the proponent with the lowest cost per point.

Background:

In the Board's strategic plan, a number of initiatives were identified both to improve access to and increase the ease of use of the Library's virtual services. Capital funding of \$1.4 million for Remote & Personalized Services was approved in the Library's 2001 Capital Budget to address these initiatives.

Single search interface and remote customer authentication are two of the services that were identified to further these initiatives. The nature of these services can be summarized as follows:

1. Single Search Interface:
Single Search Interface will enable Library customers and users of the Library's web services to search simultaneously all 67 databases. At present, customers interested in obtaining information from different sources must search a database at a time. This new service will accomplish two goals:
 - a. enhancing access to Library web services and electronic resources; and
 - b. Simplifying searches to all Toronto Public Library electronic resources -- users will be able to perform cross-database searching, however, they will still retain the ability to search each individual resource if they desire to do so.
2. Remote Customer Authentication and Authorization:
While a large number of the Library's databases can be searched by users with no restrictions, licensing agreements with database vendors require that only Library card holders be allowed remote access to 25 of these databases. In order to comply with the license requirements, the Library requires a customer authentication system. The advantage of the Remote Customer Authentication and Authorization system is that Toronto Public Library will gain full control over the delivery of its web services according to its policies. Not only will the new service ensure that only users with valid Library cards will be granted remote access to third-party vendor databases, but it will also have the flexibility necessary to accommodate any changes in Library policy with regards to the delivery of electronic services.

The implementation of a single search capability and customer authentication represents only part of a larger project to improve the Library's virtual services. Additional services include public access PC booking, which is addressed in a separate request for proposal, online reference, and voice application technology.

Comments:

A Request for Proposal was issued by the Library's Purchasing Department and advertised in the Toronto Star as well as on the Toronto Public Library web site. Fourteen firms were also invited to bid on the proposal. Nine companies responded to the request for proposal.

RFP Evaluation Process:

As requested in the RFP Terms of Reference, the written proposals consisted of a two envelope system with the first envelope containing the technical and functionality component, and the second sealed envelope containing the fee component. The selection process stipulated that the envelope containing the cost proposals would not be opened until the evaluation of the technical and functional components had been completed.

Using evaluation criteria specified in the RFP as stated below, the evaluation process was conducted by the evaluation team. The evaluation team consisted of representatives from the Library's Information Technology Department as well as staff involved in the development and delivery of the Library's web services.

Proposals were first reviewed for technical and functional content and evaluated. Clarification questions were posed to proponents upon completion of initial review by the evaluation team. The evaluation included a presentation and product demonstration for those candidates who scored 75 out of 100 based on their written submission. References provided by the proponents were also contacted. Three proponents who scored above a pre-determined threshold of 75 percent were eligible to have their fee envelopes opened.

The fee envelopes were opened and evaluated. The lowest cost per point was identified and the proponent with the lowest cost per point, A-G Canada, has been recommended for the award.

Evaluation Criteria:

The evaluation criteria were as follows:

- overall quality and scope of offered services
- responsiveness to requirements outlined in the RFP
- complete and comprehensive proposal details
- deliverables that will integrate with the Library environment
- solution proposal that meets RFP requirements with minimal customization
- proposed methodology to carry out work, minimize risk, and ensure quality of solution implementation
- proponent support during all implementation phases
- resources available to execute the implementation plan
- knowledge transfer and documentation
- experience with similar projects
- financial stability
- commitment to ongoing development of product
- ability to provide support
- cost

Conclusion:

The proposal from A-G Canada meets the technical and functional requirements and the lowest cost per point requirement for the Library's Request for Proposal. It is recommended that authority be granted to commence negotiations with and, if successfully concluded, enter into an Agreement with A-G Canada, for the purchase, implementation, training and support of a single search interface and remote customer authentication and authorization system.

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List of Attachments:

Not applicable.