REQUEST FOR PROPOSAL

LIBRARY DATA ANALYTICS AND VISUALIZATION PLATFORM

AMENDMENT #_1

AMENDMENT #1 ISSUE DATE: July 12, 2024

The following questions have been asked concerning the Board of Trustees of the St. Louis County Library District's Request for Proposal for a Library Data Analytics and Visualization Platform, dated June 27, 2024 (the "RFP"):

Question	Library District Response
Do you expect this to be a COTS Solution, or can it be a custom-developed solution we build specifically for you?	The Library District prefers a solution that can be fully implemented by the end of 2024.
Can you please provide the list of data systems along with their type and size?	Polaris Integrated Library System Bib Records: 1,243422 Item Records: 1,852,241 Patron Records: 957,778
Where are the current data systems hosted and who maintains them?	The Polaris Integrated Library System is hosted by Innovative Interfaces / Clarivate. The other data systems we would like to include have various hosting and maintenance arrangements in place. Detailed information on the other systems will be provided to the selected vendor.
What are your current pain points with the existing system?	The existing system is not a centralized platform. Data needs to be pulled from many different sources, which is time consuming and causes difficulty in analyzing the data as a whole.
Do you have any technical preferences for dashboards and reporting (Power BI or Tableau)?	No
Do you have any hosting preferences (Cloud or On-prem)?	Cloud
Who will be responsible for managing the hosting of the solution?	The selected provider
Can you share the total number, type, and format of the reports that you expect to generate through this system?	There is not a given number, but we would like to at least include typical KPI used by public libraries - visits / traffic, circulation by branch - collection - material Type, programming sessions and attendees, computer usage, item and record holdings, requests placed and filled, Top performing titles, database utilization.
How many users will be concurrently accessing the system? Also, please specify the total number of users and their respective roles.	Administrators 3 Creators 100-150 (branch, department managers + asst managers)

Are there any 3rd party software/ applications that need to be integrated with the platform? If yes, can you please list it out?	Polaris Integrated Library System (required) Optional: Smart Money Manager Pharos Trafsys My Turn Baker and Taylor 360 Overdrive WaitWhile Vega Discover Vega Program Subscription Research Databases, such as those provided by Proquest, Gale, and EBSCO's Discovery Service.
Is it mandatory to have business registration in Missouri to participate in this RFP?	See RFP for requirements
Do you expect the vendor to perform any tasks on-site, or can all work be performed Remotely?	Remotely
What is the anticipated contract start and go-live date?	We would like to start ingesting data no later than Jan 1, 2025.
What are the expectations for ongoing support after the initial launch?	Options for staff training and online or phone support as needed. Integration of new data sources as they are acquired by the Library District.
Is the project funded? If yes, what is the overall budget associated with the project?	A specific budget has not been determined.
Regarding Section 1a of the scope of the work, could you specify any unique configuration parameters or adjustments required for integrating with APIs such as Innovative's Polaris, Trafsys, Overdrive, and Baker & Taylor's Title Source 360? For instance, are there specific data endpoints or custom query structures needed for each of these systems? Moreover, are there any particular challenges or considerations, such as rate limiting or authentication protocols, that should be accounted for during the integration process to ensure seamless data flow?	The selected vendor will need to review the API documentation for each system to identify specific data endpoints and understand any custom query structures required.
In the context of Section 1d of the scope of the work, can you provide specific examples of the types of data that require real-time synchronization as opposed to those that can be handled through scheduled periodic pulls? For instance, is real-time syncing necessary for circulation data or user activity logs to maintain up-to-date records, while periodic pulls could suffice for inventory updates or monthly statistical reports?	Real-time synchronization is preferred for visit, circulation, and request data. Periodic pulls would be acceptable for data such as monthly reports, collection inventory, programming, top performing titles, and computer usage.
Regarding Section 2a of the scope of the work, are there specific design principles or existing interface examples that the proposed solution should adhere to in order to maintain consistency and usability for your staff? For instance, should the interface align with design standards such as Material Design or Apple's Human Interface Guidelines? Additionally, if there are any current systems in use with user interface elements that your	Our focus is on a user-friendly, clean, and easy-to-read interface. We trust the vendor to apply appropriate design principles to achieve this goal.

staff find particularly effective, could you provide examples or screenshots?	
For Section 2c, could you outline the various roles within your organization that will need access to the platform, along with the specific permissions required for each role? For instance, should librarians have full access to create and modify reports, while data analysts might need permissions to manage data integration and perform advanced data queries? Furthermore, are there any roles, such as administrative staff or IT support, that would require limited access for specific tasks like user management or technical troubleshooting?	Managers and Assistant Managers should have the ability to create custom reports. The System Administration Department, consisting of 3 staff members, should have full access to manage data and perform advanced queries. They will also administer user accounts. Other staff, along with the Library Board of Directors, will need the ability to view published reports.
Regarding Section 3a of the scope of the work, could you detail the types of reports that are most frequently utilized by your staff? Such as, do you commonly generate circulation statistics, user engagement analytics, or inventory management reports? Additionally, are there existing reporting templates or formats, such as monthly performance summaries or annual financial overviews, that the new platform should support to ensure continuity and ease of use?	On a monthly basis, we create reports that include circulation data, visit counts, computer usage, programming statistics, and data on patron registrations. We currently provide our Board of Directors with a PDF document containing visualizations of this data.
In Section 3b, could you specify which data fields or filter settings are essential for your reporting needs? For instance, do you frequently need to filter reports by date ranges, user demographics, or specific library branches? Can you also provide examples of current use cases, such as generating reports on circulation trends by genre or analyzing user engagement by age group?	It is essential for us to filter by branch location, item material type and collection (genre), specific date ranges, and checkout source. For example, we report monthly on circulation and visits by branch location. We also report on programming attendance by age level.
Section 3c mentions customizable formats for downloading and sharing reports. Are certain reports required to be submitted to regulatory bodies in a particular format, or do you have internal protocols that dictate the use of specific file types for ease of distribution and review?	We are not required to submit files in any given format. However, we do prefer to present finalized reports in PDF format for its consistent formatting and printability
In reference to Section 4a, could you detail the specific compliance standards, such as GDPR, HIPAA, or any local privacy regulations, that the data anonymization process must adhere to? Are there particular types of patron data or user interactions that require stricter anonymization protocols to protect privacy?	Any data that derives from a patron's personal information needs to be anonymized
Regarding Section 4b, could you provide details about any existing partnerships with other libraries or institutions where data sharing is involved? Specifically, what types of data are shared, and what agreements or protocols govern these exchanges? For instance, are there specific safeguards or anonymization processes required before data is shared to ensure privacy compliance?	SLCL shares the Polaris Integrated Library System with the St. Louis Public Library. It is not necessary to anonymize SLPL data, other than a patron's personal information that should be anonymized universally.
In regard to Section 5a, could you detail the specific file formats that your staff predominantly uses for data uploads, particularly those that involve complex data structures or large datasets? For instance, do you frequently use JSON for its nested data capabilities, or	Our data uploads are primarily using .cvs and .xlsx files.

are large datasets typically handled in compressed formats like ZIP or RAR to manage file size constraints? How do these formats integrate with your current data processing workflows, and are there specific challenges, such as data parsing or error handling, that need to be addressed in the new platform?	
In line with the requirements noted in Section 5b concerning data validation and error checking, could you elaborate on the specific data integrity challenges that are most prevalent within your current systems? For instance, are there frequent issues with duplicate records, incomplete data entries, or inconsistencies in data formatting that the new platform should automatically detect and rectify? Moreover, are there particular validation rules or cleaning processes—such as normalization of date formats or validation of numerical entries against predefined ranges—that you have found essential for maintaining the accuracy and usability of your data?	The challenges will stem from having data from a variety of sources. There will be duplicated records.
Regarding the tracking of qualitative data as mentioned in Section 5c, could you specify the types of qualitative data that are integral to your operations and how you currently manage this information? Are there qualitative assessments such as patron satisfaction surveys, staff feedback, or narrative reports from community events that need to be systematically captured and analyzed? How is this data currently utilized in decision-making processes or in enhancing library services?	One of the qualitative data points that we collect is informal patron feedback. This is collected using a Google form submitted by library staff. The submissions are transferred to a Google Sheet. On a monthly basis, the data is shared with Library Managers and administrators, who can then decide if any action or decision should be considered based on those comments.
In reference to Section 6a, which discusses the implementation of dynamic dashboards, could you detail the specific key performance indicators (KPIs) that your team prioritizes for real-time visualization? For instance, are there certain metrics such as daily circulation numbers, online resource accesses, or event attendance figures that are crucial for immediate review? Could you also describe how frequently these KPIs are updated—do they change on an hourly basis, or are daily updates sufficient for your operational needs?	We need to be able to view data like circulation and visits broken down by hour. A daily update of the other KPIs would be acceptable.
Could you elaborate on the specific customization features that are essential for the dashboards as mentioned in Section 6b? For instance, how critical are functionalities like drag-and-drop widgets for building custom views, or drill-down capabilities that allow staff to explore data layers beneath surface-level statistics? Moreover, are there other interactive elements such as data filtering, sorting, or graphical representation preferences that your team finds particularly valuable in enhancing their analytical capabilities?	While functionalities like drag-and-drop widgets for custom views and drill-down capabilities are important, the ability to filter and sort data stands out as the most critical feature for our team. This prioritization of filters significantly aids in exploring and analyzing data layers beneath surface-level statistics, ultimately improving our overall data insights. Graphical representations are also critical to help us evaluate trends.
In light of Section 6 c's mention of the necessity to print dashboards, could you specify any particular print formats or presentation standards that are crucial for your stakeholder reports? Such as, are there requirements for certain reports to be in landscape orientation with specific font sizes for readability during presentations, or	A PDF printed in landscape orientation is preferred for our printed dashboard. We do not have specific guidelines for colors, but stylistically, we lean toward using the colors in our logo.

do you need certain visual elements like charts and graphs to adhere to color standards for printed materials?	
Could you provide a detailed list of all current systems and databases with which the new platform will need to integrate, beyond those specifically named in the RFP? For example, are there any CRM systems, financial management tools, or other data storage solutions in use that should seamlessly connect with the new platform? It would also be helpful to understand any existing middleware or data exchange formats that facilitate these integrations.	Refer to the RFP for the systems and databases that we want to integrate.
Could you elaborate on the current mechanisms and strategies employed by the Library District to collect and integrate user feedback specifically for your data analytics and reporting tools? For instance, are there established feedback channels such as digital surveys, focus groups, or a formal committee comprising staff and patrons that review and recommend improvements to these tools? How is this feedback processed and incorporated into the ongoing development and refinement of your analytics tools? Are there regular review cycles, or is feedback addressed on an ad-hoc basis?	The Library District uses surveys and suggestion forms to gather feedback. Informal feedback is collected using a Google form submitted by library staff. The submissions are transferred to a Google Sheet on a monthly basis.
Regarding the integration of historical data into the new platform as mentioned, could you provide specific details about the data migration requirements? What is the total volume of the historical data that needs to be migrated, and in what formats are these data currently stored? For instance, are we looking at moving large datasets from legacy systems like relational databases or flat files, or are there various digital formats such as XML, JSON, or proprietary formats involved? Moreover,, are there any particular challenges associated with this data, such as inconsistencies, duplicates, or data in legacy formats that might require conversion or cleansing before migration?	The historical data is stored primarily in cvs and xlsx format. The files do not contain large datasets.
Could you clarify the necessity for mobile access to the data analytics and visualization platform as it pertains to the scope of your operational needs? If mobile access is required, what specific functionalities do you envision being essential for users on mobile devices? For instance, should there be capabilities for interactive data exploration, real-time notifications, or perhaps simplified report viewing and sharing options optimized for smaller screens? Are there any particular user interface or user experience considerations that should be prioritized to accommodate mobile usage, such as touch-friendly interfaces or offline access capabilities?	Simplified report viewing would be helpful for mobile users, but mobile accessibility is not critical for our purposes.
Could the Library District please kindly grant an extension for the due date submission?	No.
Is the utilization of subcontractors permitted by the Library District for this project?	Subcontractors may be used by the proposer.
Could the Library District please clarify if is it allowed to use digital signatures?	Yes, this is permissible.

Could the Library District please clarify if there is a mandatory MBE and WBE percentage goal?	There are no percentage goals for this project.
In section General Requirements "The Library District will make every effort to target and utilize Minority/Women Business Enterprises (MBE/WBE) by using the Missouri Minority/Women Business Enterprise Program Directory as a source of identification of potential proposers. The Library District Policy provides that MBE/WBEs must be certified by the Office of Supplier and Workforce Diversity (OSWD), State of Missouri, and that such entities will be provided an equitable and fair opportunity to submit proposals". Could the Library District kindly clarify if both of these goals are mandatory? Could the vendor apply for just one goal?	Neither goal is mandatory.
In section General Requirements "The Library District will make every effort to target and utilize Minority/Women Business Enterprises (MBE/WBE) by using the Missouri Minority/Women Business Enterprise Program Directory as a source of identification of potential proposers. The Library District Policy provides that MBE/WBEs must be certified by the Office of Supplier and Workforce Diversity (OSWD), State of Missouri and that such entities will be provided an equitable and fair opportunity to submit proposals". Could the Library District kindly clarify if applicants specifically need to be from Missouri to apply for this goal?	Proposers to this RFP need not be located within Missouri.
In section General Requirements "The Library District will make every effort to target and utilize Minority/Women Business Enterprises (MBE/WBE) by using the Missouri Minority/Women Business Enterprise Program Directory as a source of identification of potential proposers". Is it allowed to use a subcontractor for these goals? If so, is it allowed to use only one subcontractor for both goals?	Subcontractors may be used by the proposer.
In section General Requirements "The Library District Policy provides that MBE/WBEs must be certified by the Office of Supplier and Workforce Diversity (OSWD), State of Missouri and that such entities will be provided an equitable and fair opportunity to submit proposals". Could the Library District kindly clarify if it is necessary to include this certification with the response?	Proposers do not need to be an MBE/WBE.
Could the Library District please disclose the allocated budget for this contract?	No.
Is there any incumbent associated with this project? If so, please disclose the name.	No.
If the resources we provide at the time of proposal submission are not available at the time of a potential contract award, could firms replace them with equally qualified resources?	Yes.
Does the Library District accept remote resources to work on the project?	Yes.

Does the Library District have a preferred pricing format? If not, can firms use an Excel spreadsheet detailing milestones and the cost of each?	Proposers should submit clear pricing that includes total year one costs (consultation, data migration, platform configuration, etc) and ongoing annual cost thereafter.
Is there a page limit for the proposal response?	No.
Is it allowed to use subcontractor references?	Yes, however the references should be indentified as those of the subcontractor.
Could the Library District please clarify, if firms can provide commercial references?	Yes, though library or governmental references would be most helpful.
Could the Library District please clarify, if firms can provide references for ongoing contracts?	Yes.
Are there any format margins that firms need to consider when writing the proposal?	No.
What is the suggested font size and type for the proposal?	10 pt font or larger should be used for readability. There is not a preferred font type.
Could the Library District please clarify if is it required to provide resumes of the proposed personnel? If yes, is there a page limit for the resumes?	Resumes of individual project personnel are not required but may be included.
In case is required to provide resumes, could the Library District please clarify if those are not included in the page limit?	There is not a page limit.
Does the Library District accept offshore resources to execute the project?	Yes.
Could the Library District please provide the estimated date of the project execution?	We are aiming to have the platform in place ready for full use no later than January 1, 2025.
Can the Library District kindly confirm that the Certificate of Insurance (COI) is a post-award requirement?	This is a post-award requirement.
Will the Library District have a preference for an MBE/WBE vendor?	This is a preference but not a requirement.
Section General Requirements states "All Proposers on Library District contracts for services in excess of $5,000 must provide the Library District with documentation and a sworn affidavit, with respect to employees working in connection with the contracted services, affirming enrollment in a Federal Work Authorization Program ("FWAP")". Could the Library District kindly clarify if there is a specific format to follow for the sworn affidavit?	There is not a specfic format, however, all affidavits must meet the requirements of Section 285.525 of the Missouri Statutes.
Section General Requirements states "All Proposers on Library District contracts for services in excess of $5,000 must provide the Library District with documentation and a sworn affidavit, with respect to employees working in connection with the contracted services, affirming enrollment in a Federal Work Authorization Program ("FWAP")". Could the Library District please clarify if this must have a Notary Signature?	The affidavit must be a sworn affidavit complying with the requirments of Section 285.525 of the Missouri Statutes.
Section General Requirements states "All Proposers on Library District contracts for services in excess of $5,000 must provide the Library District with documentation	This must be included with the proposal.

and a sworn affidavit, with respect to employees working in connection with the contracted services, affirming enrollment in a Federal Work Authorization Program ("FWAP")". Could the Library District kindly consider accepting this requirement post-award?	
Section General Requirements states "Pursuant to Section 34.600 RSMo., in the event that the contract for the services described in this Request for Proposals is for $100,000 or more, and the successful Proposer employs ten (10) or more employees, the contract shall include a written certification that the Proposer is not currently engaged in and shall not, for the duration of the contract, engage in a boycott of goods or services from the State of Israel; companies doing business in or with Israel or authorized by, licensed by, or organized under the laws of the State of Israel; or persons or entities doing business in the State of Israel". Can the Library District kindly confirm this is a post-award requirement?	This requirement must be adddressed prior to executing a contract.
Under section Desired Minimum Qualification, could the Library please confirm if those qualifications are mandatory to bind on this solicitation?	These qualifications are required.
Under section Desired Minimum Qualification, states "The Proposer must have a minimum of 10 years of experience in providing data analytics and visualization software." Could the Library please confirm if vendors can showcase this experience by providing commercial case studies?	Proposers may address this experience as they see fit.
Is it required to have experience with Innovative's Polaris, Trafsys, Overdrive, and Baker & Taylor's Title Source 360 for this opportunity?	It is not required, but preferred.
Under section Desired Minimum Qualification, states "The Proposer must have the financial stability to support the proposed solution for the duration of the contract." Could the Library please confirm what information vendors have to provide to meet this requirement?	No documentation of this is required in the proposal, but a vendor may wish to address the financial strength and position of the company.
Under section Desired Minimum Qualification, states "The Proposer must be in compliance with all applicable laws and regulations related to the provision of data analytics and visualization solutions." Could the Library please confirm if vendors only have to provide a written statement to meet this requirement?	A written statement is adequate.
Under section Desired Minimum Qualification, states "The Proposer must have the financial stability to support the proposed solution for the duration of the contract." Could the Library please confirm if vendors only have to provide a written statement to meet this requirement?	A written statement is adequate.
Section Desired Proposer Qualifications states "The Proposer must have a proven track record of successful implementations of data analytics and visualization platforms for organizations of similar size and complexity". Could the Library District please clarify if	No specific documentation is required, but the proposal should address this matter.

there is any documentation that needs to be provided within the response as proof of the requirement?	
Section PROPOSAL REQUIREMENTS states "(iv) Copies of all license(s) from applicable governing authority to do business in the State of Missouri and certificate of good standing for the State of Missouri, as applicable". Could the Library District please clarify whether providing proof of the request for the business license and certificate of good standing will meet these requirements?	The licenses must be acquired prior to execution of the contract. Proof of application at the time of submitting a proposal is adequate.
Section PROPOSAL REQUIREMENTS states "(iv) Copies of all license(s) from applicable governing authority to do business in the State of Missouri and certificate of good standing for the State of Missouri, as applicable", however, section AWARD states "(c) Evidence that the Proposer is authorized to do business in Missouri and at each Library District Location". Could the Library District please clarify if those requirements are post-award or not?	The licenses must be acquired prior to execution of the contract. Proof of application at the time of submitting a proposal is adequate.
Under Section Proposal Requirements, Cover Letter, states "Documentation and sworn affidavit with respect to employees working in connection with the Proposal, affirming enrollment in a Federal Work Authorization Program." Could the Library please clarify what documentation vendors have to provide at this point?	This documentation must be included with the submission of a proposal.
Could the Library please clarify where vendors can find in the RFP the format to create the technical response?	See RFP requirements. No specific format is required.
Could the Library please clarify if for the technical response vendors only have to address the Cover Letter, the Scope of Work, and the Desired Proposer Qualifications section? If not, could the library please clarify what is the format that vendors have to follow to create the technical response?	See RFP requirements. No specific format is required.
Under Section Proposal Requirements, Cover Letter, states "The Proposer's qualifications to provide and implement the Project, and its experience in the provision and completion of similar projects, including such projects for public or governmental entities, within the last five years." Could the Library please confirm if vendors can provide commercial experience to suffice this requirement?	Please describe any experience the company has even it is does not include public or government entities.
How many data sources does the Library District have? What are the types of these data sources such as SQL Server/Oracle/Excel or other?	See below.
How many data sources does the Library District have? What are the types of these data sources such as SQL Server/Oracle/Excel or other?	There are 7 data sources mentioned in the RFP, but a few others could be added. Some of the data is available using a rest API. There are also data sources in Excel and in .csv format.
Does the Library District have any data source in the cloud (Azure/AWS/GCP)?	Yes.

In SOW, reference point 1. b "Provide examples of APIs that the solution can connect to and any relevant configuration options. In particular, APIs for products such as Innovative's Polaris, Trafsys, Overdrive, and Baker & Taylor's Title Source 360". Does the Library District expect the proposer to provide APIs for these data sources or it will be provided by the District?	The Library District will provide access to the APIs. The selected provider is expected to connect with existing APIs.
In SOW reference point 4 "If the solution pulls data from patron records, the solution must anonymize the data for storage". Can the Library District please explain this point?	If the solution, for example, pulls the patron address field, it would be preferred for only the zip code be retained.
Is the Library District looking for a COTS (Commercial off-the-shelf) product or custom solution?	The Library District prefers a solution that can be fully implemented by the end of 2024.
How does the Library District rate the quality of data for each of the source systems? Do firms need to improve data quality while developing the reports and dashboards?	The firms are not expected to improve data quality, unless the quality of data prevents the system from generating reports.
What is the approximate size of current data sources?	The Library District does not have the exact information regarding the approximate size of our current data sources.
How many years of data does the Library District want to analyze and what is the size of the data?	It is expected that the solution allow us to upload 10 years of historical data. The Library District does not have the exact information regarding the approximate size of our current data sources.
Does the Library District have any existing reporting system for analyzing data (maybe Excel charts/SSRS)?	The Library District has access to Excel Charts, SSRS, and can query the data directly using SQL.
What is the expected source-wise data growth rate in terms of % on a yearly basis?	The Library District does not have expected data growth information.
How many users/stakeholders are required for report/dashboard access?	It is expected that 103-153 users will have access to the dashboard.
Does the Library District have any preference for a dashboard tool (Power BI/Tableau)?	No.
Do the users need restricted data in reports in comparison to other users or every user has the same access to data?	Each user will have the same access.
Does the Library District require data updates on dashboards on a real-time basis?	It is not required, but preferred for certain KPIs, such as circulation.
How many reports/dashboards does the Library District expect from this project?	We expect to be able to generate an unlimited number of reports and dashboards.
Can the Library District define the complexity of these dashboards? That will help us for costing.	The dashboards should allow staff to select certain KPIs that will display as a graphical visualization.
How many KPIs (Key Performance Indicators) are required from these dashboards? Can the Library District provide some descriptions of those KPIs?	There is not a given number, but we would like to at least include typical KPI used by public libraries - visits / traffic, circulation by branch - collection - material Type, programming sessions and attendees, computer usage, item and record holdings, requests placed and filled, Top performing titles.
Does the Library District have a detailed technical stack related to data sources?	No.

Does the Library District possess the necessary documentation outlining the current systems and business processes?	Documentation of this type is not complete.
What is the expected timeline of the project?	We would like to implement the solution in time to gather data on January 1, 2025
Does the Library District expect the vendor to deploy any on-site resources to complete any tasks in the project or it is possible to go for completely remote resources?	Remote deployment is acceptable.
Can firms utilize a hybrid resource model (on-site, remote, off-shore) to accomplish the project?	The Library District will take all models in consideration.

Pursuant to the terms of the RFP, all terms and conditions of the RFP, which are not hereby modified, remain unchanged. Each responder shall acknowledge receipt of this Amendment #1 by signing below and returning the Amendment #1. This acknowledgement must be received by the Library by the time specified for receipt of responses (2:00 p.m. CDT on July 25, 2024), emailed to the following:

<div align="center">

Eric Button, Deputy Director
St. Louis County Library District
ebutton@slcl.org

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We hereby acknowledge receipt of Amendment # 1 to the Board of Trustees of the St. Louis County Library District's Request for Proposal for a Library Data Analytics and Visualization Platform dated June 27, 2024.

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Name of Responder

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Signature

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Title

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Date