

***\*Please refer to the meeting minutes for amendments***

**Report to / Rapport au:**

**Ottawa Public Library Board  
Conseil d'administration de la Bibliothèque publique d'Ottawa**

**February 5, 2019 / 5 février 2019**

**Submitted by / Soumis par:**

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**File Number: OPLB-2019-0204**

**SUBJECT: Integrated Library System Contract**

**OBJET: Contrat du système de bibliothèque intégré**

#### **REPORT RECOMMENDATION**

**That the Ottawa Public Library Board approve a five-year agreement with SirsiDynix for the provision, support, and maintenance of the Integrated Library System, as further described in this report.**

#### **RECOMMANDATION DU RAPPORT**

**Que le Conseil d'administration de la Bibliothèque publique d'Ottawa approuve un accord de cinq ans avec SirsiDynix pour la mise à disposition, le soutien et l'entretien du système de bibliothèque intégré tel que décrit dans ce rapport.**

#### **BACKGROUND**

As per the Ottawa Public Library Board ("the Board") policy OPLB-001 Roles and Responsibilities of the Board and Trustees, the Board has the responsibility to review and approve major strategies, plans, and decisions. This is further refined within Board policy OPLB-002 Delegation of Authority item #4, with the Board having the authority to

consider and approve general competitive and noncompetitive operational expenditures, including multi-year software license agreements, equal or above the \$500,000 threshold, including applicable taxes.

As per the Board-approved Technology Framework OPLB-2018-0303, Ottawa Public Library (OPL) has committed to undertaking a review of major library automated systems on a four-year cycle, in order to evaluate the changing market, determine whether the system reviewed continues to meet OPL's requirements, and whether OPL needs to go to market to ensure best value for money.

The purpose of this report is to seek approval for a five-year contract for the provision, support and maintenance of the current Integrated Library System (ILS), Symphony.

## DISCUSSION

The ILS is the heart of public library technological infrastructure and is central to storing customer data and to managing the acquisition, cataloguing, and circulation of library materials. Since 2010, OPL has used Symphony, a product of SirsiDynix, as its ILS. Symphony, a client-server system<sup>1</sup>, connects to a wide range of services and hardware that are integral to the daily operations of the library, such as OPL's web catalogue, BiblioCommons.

In 2018, OPL underwent an evaluation of Symphony and a review of other major integrated library systems on the market. The following high-level results informed the report's recommendation:

- The current ILS vendor, SirsiDynix continues to meet OPL needs by providing a stable product in Symphony, with scheduled enhancements and bug fixes at each release.
- It is forecasted that SirsiDynix will continue to meet OPL's needs through its current development strategy, which focusses on:
  - Continued improvements to Symphony overall; and,

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<sup>1</sup> A computing system composed of two logical parts: a server, which provides information or services, and a client, which requests them. On a network, for example, users can access server resources from their personal computers using client software (source: McGraw-Hill Dictionary of Scientific & Technical Terms, 6E, Copyright © 2003 by The McGraw-Hill Companies, Inc.)

- Creating web-based modules for core Symphony processes. This will improve staff experience and productivity, as well as diminish reliance on IT infrastructure and onsite servers.
- Two ILS competitors can provide an equal level of functionality and tools for managing library operations. There are areas where they excel, and others where they lack the equivalent abilities OPL has come to expect from Symphony.
- When considering switching to a new ILS, marginal advantages must be held against the overall cost of adapting OPL to a new system. There is little advantage to staff or to customers to undertake a massive migration to another ILS system at this time.
  - The ILS touches all of the library's operations and staff workflows, meaning that a migration to a new ILS would require a wholesale retraining of OPL staff and adapting of workflows to any new system.
  - A migration would likely affect integration with other vendor products and services, such as how the ILS connects to the public wireless network and BiblioCommons.
  - All French-language adaptations that have been programmed within Symphony would need to be replicated in a new system, such as French-language labels for use with BiblioCommons.
  - There would be little benefit to customers, except for potentially minor functionality increases or decreases, as customers will continue to interact with BiblioCommons.

OPL had a five-year agreement in place for the provision, support and maintenance of SirsyDynix products. This agreement expired at the end of 2018. The CEO, under delegated authority, could negotiate a one-year agreement for 2019 and issue a Purchase Order for the 2019 renewal amount of \$172,364.51 (excluding applicable taxes), which represents a 4% price increase over the 2018 contract price.

As part of the negotiation, SirsiDynix has committed to honouring a five-year term with a 0% annual increase should the OPL enter into a new five-year agreement, covering the period of 2019 to 2023. The 2019 contract would amount to \$165,894.63 (excluding applicable taxes). In light of the conclusions of the review, and the added financial

incentive offered by SirsiDynix, a five-year commitment under the above terms is recommended. This would represent an annual expenditure of \$165,894.63 and a total expenditure of \$861,822.55 from 2019 to 2023. All prices are in Canadian dollars.

## **CONSULTATION**

Input was collected from staff and the management team at OPL, as well as staff from Supply Services at the City of Ottawa. The review of potential ILS was informed by published articles and industry tools such as the American Libraries Magazine's annual library systems report and the Library Technology Guides produced by Marshall Breeding. Finally, staff have consulted colleagues in other public libraries regarding their ILS experiences.

## **LEGAL IMPLICATIONS**

Should the Board approve the recommendation, OPL would enter into a five-year agreement with SirsiDynix for the provision, maintenance and support of Symphony and associated modules and tools.

## **RISK MANAGEMENT IMPLICATIONS**

There are no risk implications associated with this report. If the recommendation is not approved, cost for the provision, maintenance and support of Symphony will increase as OPL will renew subsequent contracts on an annual basis at a percentage increase yet to be determined.

## **FINANCIAL IMPLICATIONS\***

The financial implications are included in the recommendation and the body of this report and recognize a noncompetitive purchase of \$861,822.55 over a five-year period, from 2019 to 2023, as per the City of Ottawa Purchasing Bylaw No. 50 of 2000. The funds required for the annual purchase of \$165,894.63 are already included within the OPL base operational budget envelope.

## **ACCESSIBILITY IMPACTS**

There are no accessibility impacts associated with this report.

## **TECHNOLOGY IMPLICATIONS**

There are no technology implications associated with this report as OPL would maintain the existing ILS.

## **BOARD PRIORITIES**

The recommendation is aligned with the Board's strategic direction and priority: Developing services that are customer centric - Enhance the customer experience by leveraging best practices and technology.

## **DISPOSITION**

Upon approval of the recommendation, staff will:

1. Conclude a five-year agreement for the provision, maintenance and support of SirsiDynix products, to be signed by the CEO.
2. Work with City of Ottawa Supply Services to initiate annual purchase orders.
3. Undertake a review of major integrated library system in 2022 and report to the Board in Q1 2023 in order to align with the budget cycle and the terms of the long-term agreement with SirsiDynix.