2026

SWAN Request for Proposal for ILS & Analytics Software Platforms

VERSION 1.1

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SWAN Request for Proposal for ILS & Analytics platforms

Notice of Intent to Propose to SWAN RFP

SWAN requests notification on or before **October 23, 2026 4:00PM Central Time,** by completion and return of this form, of intent of Proposer to submit a proposal in response to the Integrated Library System & Related Services Request for Proposal. SWAN requests this information in order to plan for adequate review of proposals.

Please respond to the following questions on the intent to propose form on the SWAN website; responses may also be returned by email transmission.

PROPOSER ILS READINESS FOR SWAN RFP: REQUIRED

Before the proposer considers responding to SWAN's RFP, it is required that the two questions below be answered YES in order for the proposal to be considered by SWAN.

Questions to Proceed with SWAN RFP	**Answer YES or NO**
Does the proposer's software presently run a group of 25 or more independent public libraries that has been running in a production environment for 1 full year? The libraries must be independent organizations and at least 25 of them must be public libraries.	
Does the proposer's software presently run an installation with an annual circulation of 10 million transactions or more? This will include check-outs of combined home library patrons and combined reciprocal borrower patrons.	
If the proposer has answered no to one or both questions, do not submit a proposal to SWAN. Any proposal received that has answered no to either of these questions will be rejected.	
If the proposer has answered yes to each of these questions, please note these libraries below and then again in "Section 6.4 Relevant Customer Experience and References" of your proposal.	

Group Name(s)	Library Staff Contact Name	Email & Phone of Contact

1 Purpose and Objectives

System Wide Automation Network (SWAN) is requesting responses to this Request for Proposal (RFP) from qualified Proposers that supply and support Integrated Library Systems, Library Service Platforms, or Library Management Systems for the SWAN library consortium as specified in Appendix A.

Through this document, the terms Integrated Library System (ILS), Library Services Platform (LSP), and Library Management System (LMS) are used interchangeably to refer to the requested system.

This RFP includes detailed specifications regarding the delivery, migration, implementation, and maintenance, and support of an ILS. SWAN library members seek a reliable, flexible, proven, and contemporary ILS. The system must support relevant library standards, information technology, security, and telecommunications standards.

The objectives of this RFP are for SWAN to evaluate and select an ILS that:

- Is cost-effective and economically sustainable to maintain;
- Is hosted by the selected Proposer via a software as a service (SaaS);
- Integrates fully with Aspen Discovery and SWAN's mobile application SWAN Libraries + built on LiDA (Library Discovery App);
- Provides a web-browser based solution for the majority of daily ILS functions for library staff, with accessibility features such as font size adjustments and screen layouts utilizing a responsive design;
- Offers a set of solutions for obtaining data metrics in library staff interfaces accessed within a web-browser, while also providing additional powerful features at the command line for SQL queries or business intelligence applications;
- Integrates with SWAN's PingOne single sign-on (SSO) solution where SWAN member library staff have individual logins with password complexity policy enforcement as well as system auditing features.

Proposers are encouraged to read the RFP in its entirety prior to submitting a response to fully understand the scope of the RFP and to ensure full compliance with submission requirements.

This RFP is intended to solicit proposals for SWAN's evaluation and consideration. Issuances of this RFP, receipt of proposals, or selection of a preferred proposer shall not obligate SWAN to purchase any system or services or enter into any agreement. Any resulting contractual obligations shall arise out of a definitive written agreement approved by SWAN in accordance with its applicable policies and legal requirements.

2 Contact Information

2.1 Correspondence

All correspondence relating to this RFP must be submitted via e-mail to the contacts listed below, except that questions concerning the RFP must be submitted through the SWAN website in accordance with Section 2.2.

Scott Brandwein
Assistant Director
SWAN
915 Harger Road, Suite 260
Oak Brook, Illinois 60527
630-326-7455
scott@swanlibraries.net

or

Aaron Skog
Executive Director
SWAN
915 Harger Road, Suite 260
Oak Brook, Illinois 60527
630-326-7022
aaron@swanlibraries.net

2.2 Questions

Questions regarding this RFP must be posted through SWAN website by the deadline established in this RFP

Proposers shall not contact, directly or indirectly, any other SWAN employee or SWAN member library employee or board member regarding the contents of this RFP or for the purposes of including or attempting to influence the process. Any proposer seeking information, clarification, or interpretations from any other consortium officer or SWAN employee uses such information at Proposer's own risk; SWAN is not bound by such information. Following the Proposal submittal deadline, Proposers shall continue to direct communications to only the SWAN Assistant Director.

To the extent practical, SWAN will attempt to answer questions it deems to be in the best interest of the process and that contribute to its effectiveness and fairness. To the degree possible, SWAN will answer questions as they are received. Responses will be sent to all

Proposers. The identity of the party who asked a question will not be included in any answer. SWAN reserves the right to edit the wording of questions to improve the value of the answer(s) disseminated.

Furthermore, SWAN reserves the right to ignore certain types of questions. SWAN shall not be held responsible for verbal changes or amendments to this RFP. All changes or amendments to this RFP shall be in the form of an addendum which will be posted to the SWAN website.

This RFP and all subsequent modifications to it are hereby designated as the sole reference and authority for the preparation of proposals and take precedence over all information related to the acquisition obtained from any source either by verbal or written communication.

3 General Terms and Conditions

3.1 Proposal Validity Period

By submitting a proposal, the Proposer agrees that it will remain binding upon the Proposer for a period of 180 days following the proposal submission deadline, unless extended by mutual written agreement. During this period, the Proposer shall maintain the pricing, terms, and conditions contained in its proposal, subject to any modifications mutually agreed upon during contract negotiations. Submission of a proposal, evaluation of proposals, or selection of a preferred Proposer shall not create a binding contract with SWAN. Any contractual obligations shall arise only upon execution of a definitive written agreement by the authorized representatives of SWAN and the selected Proposer. SWAN may request that one or more Proposers extend the validity period of their proposals in writing. No Proposer shall be obligated to extend its proposal without its written agreement.

3.2 Withdrawal of Proposals

Following the proposal submission deadline, a Proposer may request withdrawal of its proposal by written notice to SWAN. SWAN reserves the right to determine whether to permit such withdrawal, taking into consideration the circumstances of the request and the integrity of the evaluation process.

3.3 Proposal Rejection

SWAN reserves the right to reject any or all proposals received in response to this request. SWAN also reserves the right to waive any minor informalities or irregularities in proposals received. SWAN further reserves the right, in its sole discretion and subject to applicable law, to reject any proposal in whole or in part; request additional information or clarification from any Proposer; conduct interviews, demonstrations, or additional evaluations; negotiate with one or more Proposers; discontinue negotiations with any Proposer; request revised proposals; extend submission deadlines; amend the RFP; or cancel the selection process at any time prior to execution of a definitive written agreement. SWAN shall not be obligated to award a contract as a result of this RFP.

3.4 Proposer's Cost to Develop Proposal

SWAN is not liable for any cost incurred by any Proposer in connection with preparing or submitting a proposal or participating in the RFP evaluation and selection process, including presentations, demonstrations, interviews, negotiations, or other related activities. Costs for developing proposals in response to this request are entirely the obligation of the Proposer and shall not be chargeable to SWAN.

3.5 Contract Documents

The selected Proposer will be required to execute a contract with SWAN. The terms and conditions of any resulting agreement shall be subject to negotiation and approval by SWAN. This RFP, the selected Proposer's proposal, and any related correspondence or other documents shall become part of the resulting agreement only to the extent expressly incorporated by reference into the final written agreement. In the event of any inconsistency among incorporated documents, the order of precedence shall be established in the final agreement. No contract shall be binding upon SWAN unless and until executed by its duly authorized representative.

This RFP is issued solely for the purpose of soliciting proposals and does not constitute an offer to contract. Neither the issuance of this RFP nor the submission, evaluation, or selection of any proposal shall create a binding contractual obligation on the part of SWAN.

3.6 Format

The Proposer will be required to submit the response to the upload link provided in PDF format.

SWAN must receive the proposal no later than 11:59 p.m. Central Time on November 20, 2026. Proposals received after the submission deadline may be rejected. Proposers are

responsible for ensuring that their proposals are successfully submitted and received through the designated SWAN website before the deadline.

3.7 Proposal Evaluation

SWAN and any advisors, as it may consult, will review and evaluate all proposals which are submitted by the time required and are presented in the format prescribed in this RFP.

Subject to applicable law, SWAN intends to evaluate proposals based on the overall qualifications of the Proposer and the extent to which the proposed solution satisfies SWAN's operational, technical, financial, and service requirements. Evaluation considerations may include system functionality, compatibility with existing SWAN systems and third-party applications, implementation and data migration capabilities, hosting and security, reliability, customer support, relevant experience, total cost of ownership, and other factors identified in this RFP.

SWAN is not obligated to select the proposal offering the lowest initial price or lowest total cost, provided that selection on a basis other than the lowest responsible bid is permitted by applicable law. SWAN reserves the right to request additional information or clarification from any Proposer, conduct demonstrations, presentations or interviews, seek revised pricing or best and final offers, and negotiate with one or more Proposers before making a final selection. SWAN may consider information obtained through these activities in evaluating proposals. Any selection shall be subject to the negotiation, approval, and execution of a mutually acceptable written agreement.

3.8 Confidentiality and Disclosure

Proposals and other materials submitted in response to this RFP may constitute public records subject to disclosure under the Illinois Freedom of Information Act (5 ILCS 140/1 et seq.). Proposers should not assume that information submitted to SWAN will remain confidential.

A Proposer claiming that particular information is exempt from disclosure under applicable law, including trade secrets or other information protected from disclosure, shall clearly identify the specific portions of its proposal for which confidential treatment is requested and provide the basis for the claimed exemption. Designation of information as confidential or proprietary shall not, by itself, establish an exemption from disclosure. SWAN will determine whether information is subject to disclosure in accordance with applicable law and shall not be bound by a Proposer's confidentiality designation. SWAN cannot guarantee that any information submitted in response to this RFP will be withheld from disclosure.

3.9 Indemnification

Each Proposer shall be responsible for its own acts and omissions in connection with its participation in the RFP process. Any indemnification obligations applicable to the selected Proposer shall be addressed in the final written agreement negotiated and executed by SWAN and the selected Proposer.

3.10 Accuracy & Completeness of Proposals

By submitting a proposal, each Proposer represents that, to the best of its knowledge after reasonable inquiry, the information contained in its proposal is accurate and complete in all material respects. Each Proposer shall promptly notify SWAN in writing if it becomes aware of any material error, omission, or change affecting its proposal prior to execution of a contract. SWAN reserves the right to consider any material misrepresentation, omission, or failure to provide requested information in evaluating or rejecting a proposal.

3.11 Proposer Review & Assumptions

Each Proposer shall review the information and requirements contained in this RFP and identify in its proposal any material assumptions, exceptions, qualifications, or additional information necessary to support its proposed solution, implementation schedule, or pricing.

A Proposer shall not assume that an omission or ambiguity in the RFP relieves it of responsibility for identifying the software, services, integrations, equipment, or other components necessary to provide the functionality expressly included in its proposal. Any material assumptions or dependencies affecting implementation, system performance, compatibility, or cost shall be clearly disclosed in the proposal.

4 Anticipated Timeline

The following timeline for SWAN's selection process is provided below. Refer to the SWAN website for a detailed set of deadlines. This timeline is for guidance only. SWAN reserves the right to accelerate or delay elements in it as circumstances warrant.

Table 1: Anticipated Timeline

Timeline	**Activity**

October 2026	Issue RFP
October 23, 2026	Requested Notice of Intent deadline
October 23, 2026	Deadline for submission of questions concerning the RFP
November 20, 2026	Proposer response due
December 18, 2026	SWAN requests clarification of proposals
January 6, 2027	Proposer responses to clarifications due
January 13, 2027	SWAN scoring of proposals & pricing
February 2027	Finalist demonstrations & membership feedback/scoring
March 2027	Request for best & final offer pricing
April 2027	Final scoring & recommendation
May 2027	Contract negotiation
May 2028	Anticipated SWAN go-live (subject to the final agreement and implementation schedule)

5 About SWAN

5.1 Consortium Background Information

SWAN is a member-driven, patron-focused consortium in Illinois. The SWAN headquarters is located at 915 Harger Road, Suite 260, Oak Brook, Illinois 60527.

SWAN is an organization of member libraries participating in a library services platform (LSP) with the mission to improve services for member libraries by sharing resources and providing a standardized base of technology. SWAN is a multi-type organization, with 96 public libraries, 1 school district, 2 special libraries, and 1 academic library. In addition to the shared ILS platform, SWAN provides as part of its LSP a discovery platform and mobile app, membership in OCLC for interlibrary lending outside of the consortium, research database integration with OpenAthens, and advanced online patron registration with Patron Point from Springshare.

5.2 Database Characteristics

Table 2: SWAN database characteristics

Characteristic	Count
Bibliographic records	1.4 million
Authority records	1.3 million
Item records	7.1 million
Patron records	800,000
Order records	46,000 (13,000 in last year)
Invoice records	69,000 (24,000 in last year)
Vendor records	11,000
Annual checkouts	7.1 million
Annual renewals	5.1 million
Annual holds placed	2.3 million

The figures provided above are approximate and are intended to assist Proposers in evaluating SWAN's current operational requirements. Proposers are responsible for evaluating the information provided and identifying any additional information necessary to develop their proposals.

System sizing should account for an estimated 5% annual growth across all metrics over the next five years.

SWAN member libraries are organized into groups with permissions on adding and modifying bibliographic records within the ILS. SWAN member libraries obtain MARC records through a statewide group-services contract with OCLC.

5.3 Consortium Characteristics

Table 3: SWAN consortium characteristics

Characteristic	Count
Number of agencies	100
Public libraries	96
Academic libraries	1
School libraries	1
Special libraries	2
Number of physical locations	106
Number of bookmobiles	3

Number of drive-up windows	9
Number of lockers	11
Peak simultaneous staff logins	700
Consortium service population	1.9 million

The consortium characteristics identified above reflect SWAN's current operations and are provided for planning and proposal preparation purposes. SWAN's membership, facilities, and operational requirements may change during the term of any resulting agreement.

5.4 Telecommunications characteristics

SWAN libraries have business-class broadband provided to the majority through individual contracts with Comcast. Libraries are required to use a VPN connection from their external firewall to the SWAN ILS network.

The SWAN consortium takes great care to protect its ILS network traffic and data. To secure all data:

- Member libraries connect to SWAN via their Internet connection through a IPsec VPN
- Member library locations connect via firewall appliance.
- The minimum member library Internet connection speed is a T1 circuit at synchronous 1.5 Mbps.
- Several libraries utilize a fiber connection or have redundant connections using T1 circuit and Comcast Business Class, with maximum connection speeds of synchronous 1.5 Gbps.
- Wi-Fi connections for public users are in some instances segmented from the SonicWALL appliance, but Wi-Fi access points are managed by the libraries.

The use of secure socket layer (SSL) is used for the purposes of patron authentication and payment of fines using an online e-commerce system within the Aspen Discovery. Other forms of patron authentication are used with 3rd party vendors.

Proposers should identify any network, connectivity, security, or infrastructure changes that would be required to implement and operate their proposed systems, including any anticipated costs or responsibilities of SWAN or its member libraries.

5.5 Current ILS & Discovery

SWAN uses the Symphony ILS from SirsiDynix and the Aspen Discovery platform hosted by Grove for Libraries. The SWAN Libraries + (Plus) app is provided by Grove for Libraries using the Library Discovery App (LiDA).

5.6 Current Server Hardware Characteristics

SWAN uses the Symphony ILS hosted in its Microsoft Azure environment in an on-premise environment.

5.7 Local Support Characteristics

SWAN offers support during standard business hours: Monday – Friday 9:00 a.m. through 5:00 p.m. CT. Off-hours support is provided by a rotation of on-call SWAN employees.

5.8 Third-Party Product Integrations

SWAN provides support to its member libraries through the provision of SIP2 and REST API integrations for third-party vendor products and ancillary services that need to interface with the ILS. SWAN expects the prospective Proposer to provide the foundation to support the continuation of these services via TLS SIP2, API, SQL, and automated MARC exports. SWAN also expects configuration assistance that will enable a seamless transition for all services to ensure there is minimal to no downtime during the migration.

Proposers shall identify any existing integrations that cannot be maintained or supported through their proposed solution, any modifications or additional services required to maintain those integrations, and any associated costs. Proposers shall also identify any anticipated interruptions or limitations affecting third-party integrations during implementation or migration.

SWAN member libraries use of the third-party products that integrate or interface with the ILS is listed in Section 12.

6 Proposer Requirements and Qualifications

6.1 Desired Proposer Overview

SWAN seeks an experienced, reliable, and financially stable Proposer with a demonstrated commitment to the library marketplace and a proven record of excellence in product delivery and support

The successful Proposer must demonstrate the following:

- Extensive experience with large library systems, library consortia, and libraries of all types
- A proven track record of successfully migrating large library ILS platforms

- Exceptional installation, training, comprehensive documentation, and responsive customer support services
- Data migration experience with data elements from the ILS:
  - Bibliographic, holdings, serial, and authority data
  - Item and patron data
  - Circulation data
  - Bills data
  - Holds data
  - Acquisitions data

The Proposer must demonstrate a strategic and timely approach to product development and enhancement. This requirement may be satisfied either directly or through established relationships with the developers or maintainers of the proposed software.

- Consistent, timely software development and release of system enhancements
- Established mechanisms for obtaining and actively responding to customer input on system changes and new features
- Adherence to the same high-quality control standards for all new software development and features as those applied to the base system

The Proposer's financial health and commitment to the library community are vital to a successful, long-term relationship.

- The Proposer must be financially stable and demonstrate a long-term commitment to the library marketplace
- If the Proposer is part of a larger, non-library focused corporation, the viability of and commitment to the library division as a standalone entity must be clearly demonstrated
- While maintaining a professional Proposer-customer relationship, SWAN values partnership and collaboration
- A demonstrated willingness to work effectively with other SWAN partners, including:
  - Aspen Discovery & LiDA, hosted by Grove for Libraries
  - OpenAthens
  - Unique Management, including MessageBee, notice printing, and Nudge
  - Patron Point/Springshare LibConnect Pro
  - ProQuest Syndetics Unbound
  - OCLC

Where the proposed solution includes software developed, owned, or maintained by another entity, the Proposer shall describe its relationship with that entity and explain how

it will provide or coordinate the development, implementation, maintenance, security, and support services required by SWAN.

6.2 Company Organization and Staffing

Provide the following information in your response:

1. A brief history of your company
2. Identification of the majority owners and/or ultimate parent entity of your company
3. Identification of any individuals or entities that directly or indirectly own or control 10% or more of your company
4. Identification of minority owners
5. The length of time your majority owners or parent entity have held ownership of your company
6. A description of your majority owners' or parent entity's experience in the library technology industry
7. A statement describing their commitment to the library technology industry
8. A list of your company's senior executives or leadership team, including their backgrounds, tenure with the company, and any anticipated or proposed leadership changes
9. The current total number of employees
10. The current number of support staff
11. The current number of contractors
12. Whether you intend to subcontract any services if selected, and if so, which services. Identify any material subcontractors or third-party service providers and describe the responsibilities they will perform.
13. The number and locations of your company's offices
14. A list of current security certifications (e.g. SOC 2 Type II, ISO 27001, FedRAMP). Identify whether such certifications are held by the Proposer or by a third-party hosting or service provider.
15. Information about any lawsuits or legal proceedings pending or concluded within the past five years that could materially affect your company's financial condition, ability to perform the proposed services, or eligibility to contract with SWAN.
16. Disclosure of any material non-compliance your company has experienced in contracts involving comparable software, hosting, implementation, or support services within the past five years.
17. A schedule of software releases implemented over the past two years
18. Any other company or business matters that could materially impact your ability to fulfill contractual obligations to SWAN, if selected

19. Identify any material reliance on third parties for software development, licensing, hosting, cybersecurity, implementation, maintenance, or support and describe how it will ensure continuity of services if any such third-party relationship changes or terminates during the anticipated contract term.

6.3 Schedule of Planned Releases

For each product that is included in this RFP, please provide the schedule of planned releases including release features and scheduled release dates for the next three years.

The Proposer shall distinguish between committed releases and anticipated enhancements and identify whether the release schedule is controlled by the Proposer or another software developer or maintainer. Where a three-year release schedule is not available, the Proposer shall provide the available product development roadmap and describe its release practices and procedures for communicating planned changes and enhancements to customers.

6.4 Relevant Customer Experience and References

To assist SWAN in evaluating the success of similar ILS migrations and understanding their potential impact on member libraries and operations, the Proposer must provide three customer references that meet the following criteria:

- References should be as large as or larger than SWAN in terms of database size and user characteristics, as outlined in Sections 5.2 and 5.3.
- Preference will be given to consortia, especially those that do not impose standard policies on their members.

For each reference, include the following information:

- Name
- Title
- Library/Consortium Name
- Phone Number
- Email Address
- Website Address
- Date of Install
- Relevant database and user characteristics
- Identification of the software platform and the Proposer's role in its implementation, hosting, maintenance, or support

These references will be used to assess the Proposer's experience and the potential impact of the proposed solution on SWAN and its member libraries.

6.5 Proposer Responsibilities

The Proposer must assume full responsibility for the entire ILS software lifecycle, ensuring complete control over development, quality assurance, release management, and ongoing support.

The Proposer and its dedicated employees shall have complete authority and responsibility across the following areas:

- Maintaining appropriate rights, access, or authorization to use, implement, maintain, and support the proposed ILS software, including access to source code where necessary to fulfill contractual obligations.
- Establishing and maintaining appropriate arrangements for software development, maintenance, enhancements, and release management.
- Performing robust, comprehensive testing, including regression, performance, platform, and load testing before every release.
- Ensuring that all released software meets or exceeds the functional and performance requirements contained within the product specifications.
- Planning, coordinating, and executing all software releases, including appropriate testing, quality assurance, and coordination with SWAN before implementation of material changes. Ensuring that software defects and performance issues are investigated, addressed, and resolved in accordance with the support obligations established in the resulting agreement.
- Creating and maintaining comprehensive documentation (end-user, API, and database), which must be available as reasonably necessary for implementation, testing, operation, maintenance, and support of the proposed system.
- Providing all necessary installation services and maintaining all technical documentation related to the development of the software.
- Providing exceptional customer support services and delivering comprehensive and comprehensible end-user training.
- The Proposer shall identify any responsibilities performed by third parties and explain how those responsibilities will be coordinated and managed. The Proposer shall remain responsible to SWAN for the performance of all services and obligations undertaken under the resulting agreement, regardless of whether such services are performed directly or through subcontractors or other third parties.

6.6 Authority to Provide Software & Services

The Proposer must demonstrate that it possesses all rights, licenses, authorizations, technical capabilities, and resources necessary to provide, implement, host, maintain, and support the proposed software and related services throughout the anticipated contract term. SWAN will consider proposals involving proprietary software, open-source software, and software developed or maintained by third parties, provided that the Proposer demonstrates its ability to satisfy the requirements of this RFP.

If the proposed solution includes software developed, owned, or maintained by another entity, the Proposer shall identify that entity, describe its relationship with the entity, and explain its responsibilities for implementation, hosting, maintenance, updates, security, technical support, and ongoing performance.

The Proposer shall remain responsible for the performance of all services and obligations undertaken pursuant to any resulting agreement with SWAN, including services provided through subcontractors or other third parties.

7 Contract & License Terms

The Proposer must include a copy of its proposed agreement(s) for system purchase, software licensing, and ongoing support. The Proposer shall also provide copies of any proposed agreements relating to hosting, implementation, data migration, maintenance, cybersecurity, and other services included in its proposal, including any applicable third-party licensing or service terms. All proposed costs, fees, and material contractual requirements shall be disclosed in the Proposer's response. The Proposer shall identify any additional charges, licensing restrictions, third-party requirements, or other conditions that may affect SWAN's use of the proposed system or the total cost of ownership. SWAN reserves the right to negotiate the terms of any proposed agreement. Selection of a Proposer shall not constitute acceptance of its proposed agreement or create any contractual obligation on the part of SWAN. Any resulting agreement shall be subject to negotiation and approval by SWAN and shall become binding only upon execution by duly authorized representatives of both parties. Any resulting agreement shall be subject to review by SWAN's legal counsel and approval in accordance with SWAN's applicable authorization procedures.

The Proposer shall describe its proposed terms concerning SWAN's ownership, control, access, and use of all data provided by SWAN or its member libraries or maintained in connection with the proposed system, including patron, bibliographic, circulation,

transaction, and other operational data. The Proposer shall identify any restrictions on SWAN's ability to access, retrieve, export, or transfer such data during the contract term or following expiration or termination of the agreement.

The Proposer shall also describe the data export formats and methods available, the assistance it would provide in transitioning to another system or service provider, the anticipated time required to complete such a transition, and any associated fees. The Proposer shall identify its proposed procedures for returning or securely deleting SWAN data following expiration or termination of the agreement, including any applicable retention requirements or exceptions.

The Proposer shall identify any proposed limitations on liability, exclusions of damages, or other contractual provisions that would materially limit SWAN's remedies under the proposed agreement. The Proposer shall also identify the types and limits of insurance coverage maintained in connection with the proposed services, including any applicable cybersecurity liability and technology errors and omissions coverage. SWAN reserves the right to negotiate appropriate insurance, indemnification, liability, and other risk allocation provisions in the final agreement.

8 Support Requirements

SWAN requires reliable, responsive, and comprehensive technical support for the proposed ILS and analytics solutions throughout the term of any resulting agreement. Support must address system availability, performance, security, maintenance, troubleshooting, upgrades, and disaster recovery. Identify any support services provided by subcontractors or other third parties.

8.1 Hosting

SWAN is requesting a hosted Software-as-a-Service (SaaS) solution for both the ILS and analytics solutions from the Proposer, including all necessary hosting and infrastructure maintenance.

1. Identify the hosting provider, hosting locations, and any material subcontractors involved in delivering the hosted services. The Proposer shall describe its hosting architecture, redundancy, system monitoring, security controls, backup procedures, and measures for maintaining system availability and performance.
2. Identify any hosting or infrastructure responsibilities that would remain with SWAN and disclose any additional costs associated with those responsibilities.

8.2 Core Service and Support

1. Describe the technical support structure, methods for submitting and tracking support requests, escalation procedures, and availability of support personnel.
2. Provide a proposed service level agreement (SLA), including system availability commitments, severity classifications, response times, restoration or resolution targets, escalation procedures, and any service credits or other remedies for failure to meet agreed service levels.
3. Identify which support services are available 24/7/365 and which are available only during designated business hours. At a minimum, support for critical system outages and security incidents shall be available 24/7/365.
4. Describe procedures for identifying, reporting, investigating, and responding to cybersecurity incidents, including procedures for notifying SWAN of incidents affecting the confidentiality, integrity, or availability of SWAN data or systems. Identify the proposed timeframes for notifying SWAN of actual or reasonably suspected cybersecurity incidents, including any limitations on the information that will be provided to SWAN during the investigation and response.
5. Identify the security standards, policies, and procedures applicable to the proposed system, including any independent security audits, assessments, or certifications. Describe the availability of security assessment reports and other documentation reasonably necessary for SWAN to evaluate the security of the proposed services, including any contractual restrictions on SWAN's access to such information.
6. Describe how you work with 3rd party vendors on issues of support and integration.

8.3 Operations and System Maintenance

1. Describe its procedures for scheduling and communicating planned maintenance, upgrades, and service interruptions, including the anticipated frequency and duration of scheduled downtime.
2. Explain how SWAN will be notified of material system changes and how upgrades will be tested before implementation. Also describe procedures for addressing unsuccessful upgrades and restoring affected services.
3. Where direct access to monitoring, troubleshooting, or system administration tools is restricted in the proposed SaaS environment, identify the restrictions and describe the alternative tools, reports, or support services available to SWAN.
    a. Access to system monitoring tools, e.g., for memory, CPU usage.
    b. Troubleshooting or debugging utilities.
    c. System job control tools to set job priority, terminate jobs and processes, monitor jobs in progress, etc.

4. Upgrade support, including scheduling and execution of upgrades during off-peak times.

8.4 Library onboarding & addition to ILS

1. Provide an overview of the process of adding new libraries to the SWAN consortium and migrating their data into the ILS. What is the usual timeline for migration projects? Are migration services scheduled during off-peak hours to minimize disruption? Detail any downtime required.
2. Does the Proposer assign a project manager to work with SWAN throughout the process? What other support or migration personnel will SWAN work with?
3. Outline the data migration process for user, item, order, and other functional non-MARC data from the library's ILS. What data conversion tools and processes are used? Describe what support and consultation time is offered during this process?
4. What training is offered to new member library staff? To what extent is training provided by the Proposer versus SWAN?
5. Describe the process of bibliographic deduplication. To what extent is this process customizable? Would SWAN have the option to perform its own bibliographic matching and provide a merging pathway of their own?
6. Describe the process of offboarding a library from the ILS. What aspects of data extraction and deletion are performed by the Proposer versus SWAN staff? What limitations exist on the bibliographic, user, acquisitions, billing, or other functional data that can be extracted and provided to the library upon exit?
7. If a library exits the SWAN consortium, is any of their data retained in the ILS, reporting platform, third-party integrated tools, or associated servers?
8. Outline any costs involved in onboarding and offboarding libraries and their data from the ILS.

8.5 Database Tools and Capabilities

1. Identify which database administration and maintenance functions may be performed directly by SWAN and which must be performed by the Proposer or its hosting provider.
2. Describe how SWAN may obtain access to its data for reporting, analytics, integration with third-party systems, and other authorized purposes, including any applicable restrictions, technical requirements, or additional charges.
    a. Are there any tools for monitoring and managing database space and utilization?
    b. Are there any database repair and maintenance tools?

8.6 Support & Documentation

1. Provide access to current and reasonably comprehensive documentation for the proposed system and shall describe how such documentation will be maintained and updated throughout the contract term. Including:
    a. User guides.
    b. Database schema documentation.
    c. System administration documentation.
    d. Documentation for reports.
    e. System job documentation.
    f. REST API documentation.
2. Identify any documentation that will not be available to SWAN because of proprietary restrictions, third-party licensing requirements, or the architecture of the proposed SaaS solution. Where documentation is unavailable, describe the alternative information or assistance that will be provided to enable SWAN to administer, integrate, and effectively use the system.

8.7 Disaster Recovery

Proposers must provide details on the following:

1. Recommended backup and data retention.
2. Data restoration documentation.
3. Backup frequency, retention periods, storage locations, and measures used to protect backups against unauthorized access, alteration, or loss.
4. Disaster recovery and business continuity plans, including procedures for restoring services following a system outage, cybersecurity incident, infrastructure failure, or other significant disruption.
5. Proposed Recovery Time Objective (RTO) and Recovery Point Objective (RPO) for the ILS and analytics solutions.
6. Frequency of backup restoration testing and disaster recovery testing, including how the results are documented and communicated to customers.
7. Redundancy and failover capabilities, including whether backup systems are maintained in geographically separate locations.
8. Procedures for notifying SWAN of a significant service interruption and providing status updates until services are restored.
9. Identify any disaster recovery services or capabilities that are not included in its proposed pricing and disclose the additional costs associated with those services.

9 Detailing Costs

9.1 Software Costs

Proposers must provide a detailed, line-by-line, module-by-module breakdown of all costs for the core software components requested in Section 9.2. The cost proposal shall separately identify all one-time charges, recurring annual charges, licensing fees, subscription fees, hosting charges, implementation costs, data migration costs, training costs, maintenance and support fees, and any other costs necessary to implement and operate the proposed solution. The Proposer shall identify the basis upon which each charge is calculated, including any applicable charges based on the number of member libraries, users, transactions, records, storage capacity, or other usage measures.

SWAN wishes to have the Proposer provide costs for the following:

1. Hosted ILS & analytics production system. The Proposer shall identify all software, hosting, licensing, maintenance, support, and infrastructure costs associated with the production environment.
2. Hosted ILS & analytics testing system dedicated to SWAN with licensing to support the entire bibliographic and patron databases. The Proposer shall identify all costs associated with maintaining the testing environment, including any separate licensing, hosting, storage, maintenance, and support charges.

The Proposer shall specify whether the proposed costs include all software modules, integrations, interfaces, APIs, data storage, backups, disaster recovery services, upgrades, and other functionality necessary to satisfy the requirements of this RFP. Any excluded services, optional features, usage limitations, or additional charges shall be separately identified and explained.

The Proposer shall provide pricing for each year of the proposed contract term, including any anticipated annual increases, renewal charges, or other adjustments. The Proposer shall identify any proposed limits on annual price increases and any circumstances under which additional charges may be imposed.

The Proposer must clearly indicate any discounts applied to their cost proposal. The Proposer shall identify whether any discounts are temporary, conditional, or dependent upon the purchase of particular products or services. If there are consequences of accepting some, but not all, elements of the Proposer's proposal, those consequences should be detailed. If the Proposer is proposing to resell third-party software, the Proposer will specify the consequences of SWAN purchasing that software directly from the manufacturer. Such disclosure shall include any effect on pricing, warranties, technical

support, system integration, maintenance, and the Proposer's responsibility for overall system performance.

All pricing shall be stated in U.S. dollars and shall remain valid for the period specified in Section 3.1 of this RFP. The Proposer shall identify any assumptions or conditions upon which its pricing is based. SWAN reserves the right to request clarification of any proposed costs and to negotiate pricing and payment terms before execution of a final agreement.

9.2 Core Software

SWAN considers the following modules to be core components of a contemporary ILS. Proposers should respond "No" if a module is not currently available in their core system. For each item, Proposers shall indicate whether the functionality is currently available and included in the proposed core system. A "Yes" response shall indicate that the functionality is available as of the proposal submission date and is included in the proposed core system pricing. If functionality is available only through an additional module, third-party product, integration, or separate license, the Proposer shall explain that arrangement in the Comments column and separately identify any associated costs. Functionality that is planned but not currently available shall not be identified as available.

The pricing of the core system should include all of the available modules listed below. Any exceptions, limitations, usage restrictions, or additional charges associated with these modules shall be clearly identified in the Comments column and the cost proposal. SWAN reserves the right to evaluate the proposed functionality, licensing arrangements, and associated costs in determining which proposal best meets its requirements.

Table 4: SWAN Core Software Modules

Core product specification	Yes	No	Comments
Web-based staff client			
Analytics/reporting			
E-Commerce & payments			
Offline circulation			
Authority control			
Bibliographic import & export – MARC21			
Bibliographic import & export – Unicode			
Bibliographic import & export – MARC XML			
Bibliographic import & export – BIBFRAME			
Acquisitions with EDI/EDIFACT support			
Authority import/export – MARC 21			

Authority import/export – Unicode			
Serials Control			
System Administration			
Z39.50 Interface			
RFID Support			
Unlimited users			
Unlimited SIP license			
Unlimited API/Webservices license			
Outreach services			
System APIs and Documentation			

The Proposer shall identify any functionality listed above that is subject to additional licensing requirements, transaction limits, user limits, usage-based fees, or restrictions imposed by third-party providers. Any such costs or restrictions shall be included in the pricing information submitted under Section 9.1.

9.3 Supplemental Products and Services

In the table below, indicate how the system provides each listed product or service by selecting one of the following classifications:

- Core: included as standard functionality within the base ILS license.
- Add-on: requires an extra fee (one-time or perpetual license).
- Subscription: requires an ongoing fee (annual or recurring)
- Not supported: the system/Proposer does not offer this service.

If classified as “Add-on” or “Subscription,” identify the associated line item and all applicable charges under the “Other Costs” section of the Proposer's pricing response.

For each product or service, the Proposer shall identify whether the functionality is provided directly, through a third-party product, or through an integration with another system. The Proposer shall disclose any licensing restrictions, usage limitations, transaction-based charges, or other conditions affecting the availability or cost of the product or service.

Table 5: Supplemental Products

Product/Service	**Indicate: Core/Add-on/ Subscription/ Not Supported**	**Proposer Notes**
Digital Collection Management		

Debt Collection via Unique Management		
Telephony Notification		
Marketing Emails		
SMS Notifications		
SMS Marketing		
Real-time Authority Updates		
Regular Authority Updates		
Regular Lexile and Accelerated Reader Updates		
Patron self-registration		

Please include the cost for these additional offerings as separate line items under the "Other Costs" section of your pricing response.

The Proposer shall identify all one-time and recurring charges associated with each supplemental product or service, including implementation, licensing, subscription, integration, maintenance, support, and usage-based fees. If a product or service is provided by a third party, the Proposer shall identify that provider and explain whether SWAN would contract directly with the third party or through the Proposer.

SWAN reserves the right to accept or decline any supplemental product or service without being required to purchase other optional products or services, except where the Proposer has expressly identified a dependency or pricing condition in its proposal.

9.4 Implementation Services Costs

Proposers must detail all costs associated with migration and implementation services; these costs should include the cost for system profiling, software staging, training, data extractions, and data loads. The Proposer shall also identify costs for project management, system configuration, data conversion and validation, testing, integration with third-party systems, staff training, go-live assistance, and post-implementation support.

The Proposer should load the software on SWAN's training and production environments. For a hosted SaaS solution, the Proposer shall be responsible for establishing, configuring, and making available the production and testing environments described in Section 9.1.

The Proposer shall identify all assumptions concerning SWAN's responsibilities, staffing, data preparation, technical resources, and participation in the implementation process.

Any services or activities not included in the proposed implementation price shall be separately identified, together with their anticipated costs.

The Proposer shall provide a proposed implementation schedule identifying major milestones, deliverables, testing, training, data migration, and anticipated go-live activities. The Proposer shall also identify the payment schedule associated with implementation services and any proposed milestone-based payments. The Proposer shall identify the specific deliverables or milestones associated with each proposed payment and indicate whether payment is conditioned upon SWAN's review and acceptance of the applicable deliverables.

Any additional implementation charges resulting from changes in scope or services shall require SWAN's prior written authorization.

9.5 Other Costs

The Proposer will detail any other costs for which SWAN would be liable. Any omitted costs will be the responsibility of the Proposer.

The Proposer shall identify all costs not otherwise included in Sections 9.1 through 9.4, including any charges for additional users, member libraries, transactions, storage, interfaces, APIs, integrations, data exports, upgrades, training, technical support, or other services. The Proposer shall also disclose any minimum purchase requirements, usage thresholds, third-party charges, or other pricing conditions.

Except for charges expressly identified in the accepted proposal or subsequently approved in writing by SWAN, the Proposer shall not be entitled to additional compensation for services, software, equipment, or other items necessary to provide the proposed solution in accordance with the resulting agreement.

SWAN reserves the right to review and approve any proposed additional charges before such costs are incurred.

9.6 Maintenance Costs

Proposers must provide a detailed, line-by-line breakdown of ongoing maintenance costs for all elements of the system. The Proposer will provide those costs for SWAN for the next five years.

The breakdown shall include all recurring charges for software maintenance, licensing, subscriptions, hosting, technical support, security updates, upgrades, database maintenance, backup and disaster recovery services, and any other services necessary for continued operation of the proposed solution.

The Proposer shall identify the costs applicable to each of the five years separately, including any anticipated annual increases, escalation provisions, or adjustments based on usage, membership, transaction volume, storage, or other factors.

The Proposer shall specify whether maintenance and support costs are included in the proposed SaaS subscription fees or are charged separately. Any services excluded from the proposed maintenance or support fees shall be expressly identified.

The Proposer shall disclose any proposed pricing changes upon renewal or expiration of the initial contract term, including any limitations on annual increases.

9.7 SWAN Tax-Exempt Status

SWAN is tax-exempt. Do not include taxes in the proposal.

10 Implementation Process

10.1 Configuration Testing

10.1.1 Cloud-Hosted (SaaS) Solutions

Proposers must provide an outline of a dedicated performance test suited to a hosted environment where network isolation is not possible. This test must confirm whether the proposed platform solution can sustain SWAN's system load alongside concurrent usage volumes and specify how results will be measured and reported.

The proposed testing methodology shall address expected peak transaction volumes, concurrent users, system integrations, and other material factors affecting system performance. The Proposer shall identify any assumptions, limitations, or dependencies affecting the proposed performance commitments.

Proposers must specify response times that they can guarantee, independent of SWAN's local network, and any additional hardware, software, or configuration needed to bring performance to the promised level will be provided at the Proposer's expense. Finally, Proposers must continue to monitor performance for compliance for the duration of the contract period.

The Proposer shall describe the tools and procedures used to monitor system performance and shall make performance reports reasonably available to SWAN. The Proposer shall also describe its procedures for investigating and correcting performance deficiencies.

Response time figures, testing procedures, and monitoring procedures will be established during contract negotiation.

The agreed performance standards, testing procedures, monitoring requirements, and remedies for failure to meet such standards shall be incorporated into the final agreement.

10.2 Warranty

SWAN requires that the successful Proposer warrant the performance of the system during the term of the agreement between SWAN and the successful Proposer, in which the system is under the successful Proposer's warranty period, and thereafter as long as the SWAN has a maintenance agreement with the successful Proposer, as follows:

During operation of the system under normal business conditions during normal business hours in which the activities of users are not scripted to create pre-defined transaction mixes for purposes of stress-testing the system or the response-time performance or capacity of the system, the successful Proposer warrants that the system shall perform all interactive transactions with average response times ≤2 seconds for users whose workstations are connected to the system server via a ≥100mbps LAN segment.

On demand, at any time during the term of the agreement between SWAN and the successful Proposer, in which the system is under the successful Proposer's warranty period, and thereafter as long as SWAN has a maintenance agreement with the successful Proposer, a thirty (30)-minute response-time warranty test may be conducted by SWAN to determine whether the system is meeting the above warranted response times using one (1) to three (3) workstations connected to the system server via a ≥100mbps LAN segment. The transactions active at the time shall be those occurring under normal business conditions during normal business hours.

SWAN shall have the right to request additional performance testing following a material system upgrade, recurring performance problems, or a significant service disruption. The Proposer shall cooperate with SWAN in conducting such testing and evaluating the results.

For the term of the agreement between SWAN and the successful Proposer, if the system fails to perform within the contracted response-time performance levels or functions and capabilities, the successful Proposer will make whatever enhancements to licensed software or equipment, or both, are necessary to provide the contracted levels of performance and functionality within a reasonable time frame and at no cost to SWAN.

The Proposer shall promptly investigate any failure to satisfy the agreed performance or functional requirements and shall provide SWAN with a corrective action plan identifying the proposed corrective measures and anticipated completion schedule. SWAN shall not

be responsible for additional costs associated with correcting deficiencies attributable to the Proposer or its subcontractors.

The final agreement shall establish appropriate remedies if the Proposer fails to correct material performance deficiencies within the applicable cure period, including service credits, other contractual remedies, and termination rights for material or recurring failures.

10.3 Implementation Schedule

Proposers must provide a detailed implementation outline including the following:

- A detailed timeline with major milestones.
- Composition and qualifications of the Proposer's implementation team.
- Expectations of SWAN and SWAN member staff throughout the implementation process.
- Availability to perform implementation and any scheduling or logistics considerations that would prohibit a successful implementation in mid-2028.
- The Proposer shall promptly investigate any failure to satisfy the agreed performance or functional requirements and shall provide SWAN with a corrective action plan identifying the proposed corrective measures and anticipated completion schedule. SWAN shall not be responsible for additional costs associated with correcting deficiencies attributable to the Proposer or its subcontractors.
- The final agreement shall establish appropriate remedies if the Proposer fails to correct material performance deficiencies within the applicable cure period, including service credits, other contractual remedies, and termination rights for material or recurring failures.

SWAN shall retain the right to determine whether the system has satisfactorily completed the agreed acceptance testing and is ready for production use. Commencement of production operations shall not, by itself, constitute acceptance of unresolved material deficiencies or a waiver of SWAN's contractual rights.

The final agreement shall also establish the relationship between satisfactory completion and acceptance of implementation milestones and the payment obligations associated with those milestones.

10.4 Data Migration

Proposers must be prepared to directly migrate or provide alternative solutions for all database elements including but not limited to:

- User data, including identifying and contact information, user types and analytic descriptors, creation and expiration dates, language and notification preferences, delinquency status, notes, and current holds/checkouts.
- Bill data, both paid and unpaid, including payment, owning, user, and item libraries; amount; payment status (including partial payments); and bill status.
- Bibliographic data, including all associated MARC data, cataloging status, and creation dates.
- Call number and Item data, including call number schema and volume information, item type and analytic descriptors, status, price, locations, and notes.
- Circulation data, including currently charged items with due dates, patron, items in transit, lost/missing/claims returned status and their associated users.
- Holds data, including hold level, user, status (including freeze status), and hold queue ordering.
- Serials data, including control records, predictions and subscription cycles, receiving status, and current holdings.
- Acquisitions data, including vendor data, orders and orderlines, funds, invoices, and all associated statuses and descriptive elements.

The Proposer shall identify any data elements that cannot be migrated in their existing form, any anticipated loss of functionality or historical information, and any additional costs associated with converting or preserving such data. The Proposer shall not exclude any material data elements from the agreed migration scope without SWAN's prior written approval.

SWAN’s expectation is that we will undergo a two-phased data migration process that will include:

- A test extraction and migration, being a full data migration of SWAN data to the testing/training environment for the purposes of quality assurance and training.
- The production extraction and migration, being the final data load required for implementation in the production environment.

The Proposer shall describe its procedures for verifying the accuracy, completeness, and integrity of migrated data, including reconciliation of record counts, identification of conversion errors, and correction of discrepancies identified during testing.

The Proposer shall cooperate with SWAN in reviewing and validating the test migration results before proceeding with the final production migration. Material deficiencies identified during the test migration shall be corrected before the production migration unless otherwise approved in writing by SWAN.

The Proposer shall also describe its proposed procedures for protecting SWAN data during extraction, transfer, conversion, testing, and production migration, including measures to prevent unauthorized access, disclosure, alteration, or loss.

Responses to this RFP must include answers to the following questions and prompts:

1. Can the two-phased approach be successfully completed?
2. Please provide an overview of the data conversion process, including a process outline and timeline for data mapping and any tools or software used.
3. Are there any considerations that would prevent migration of any of the data elements listed above?
4. What procedures will be used to validate migrated data and correct conversion errors?
5. What responsibilities will SWAN and its existing service providers have during data extraction, conversion, testing, and final migration?
6. What contingency or rollback procedures will be available if the production migration cannot be completed successfully?
7. What post-migration support will be provided to resolve data conversion issues discovered after implementation?

SWAN shall retain the right to review and approve the results of the final data migration in accordance with the acceptance procedures established in the resulting agreement. The Proposer shall remain responsible for correcting migration errors attributable to its services, including errors discovered after the system becomes operational, in accordance with the final agreement.

10.5 Training

SWAN staff and member library staff will require comprehensive training on the platform prior to implementation. Proposers should be willing to work closely with SWAN to create a comprehensive training plan for both internal staff and staff of our member libraries. Training would ideally take place on the testing/training environment created with real SWAN data to ensure verisimilitude with our experience on the live platform.

The Proposer shall identify the training services included in its proposed pricing, the anticipated number and format of training sessions, the availability of training materials, and any limitations on the number of participants. Any additional training charges should be separately disclosed. Training for staff should commence as early as necessary to ensure comprehensiveness and penetration throughout SWAN's membership, and it should conclude at least two weeks prior to a planned go-live date.

We require training for SWAN and membership staff in the following areas:

- Circulation and Holds: The practical mechanics and configuration of holds and circulation maps, patron management, and billing
- Cataloging and Authority maintenance, including methods to import records from OCLC Connexion.
- Serials maintenance.
- Mobile options for circulation, patron registration, and collection maintenance such as inventory.
- Acquisitions, including manual, 9xx, and EDI procedures.
- Reporting

SWAN staff will also require training in the following administrative topics:

- System Administration
- Database structure and management, including options for querying and editing beyond the standard user interface
- Integrations and connectivity
- System support options, documentation, platform community participation, and ongoing training opportunities.
- Reporting platform administration and permissions

For this RFP, Proposers must address the following questions and prompts:

- Describe the training procedures for new implementations, including the composition and experience of the training team, topics covered, structure of training, timeline, and how it will account for SWAN's consortial structure.
    - If the procedures omit any of the topics listed above, please indicate.
- Outline the support plan for the immediate months following implementation, including customer assigned support liaisons, issue reporting/escalation methods, and ongoing trainings.
- Describe opportunities for ongoing training on the platform, including asynchronous/pre-recorded trainings, seminars and live trainings, documentation/knowledge base, and training on new/updated features.
- Identify the training materials, recordings, and documentation that SWAN may retain and use for internal training purposes following implementation.
- Describe the procedures for evaluating training effectiveness and addressing material training deficiencies identified by SWAN before go-live.

The Proposer shall cooperate with SWAN in developing a final training plan, including the schedule, training topics, delivery methods, responsibilities, and materials to be provided. The agreed training obligations shall be incorporated into the resulting agreement.

11 Product Specifications

11.1 Instructions

The "Product Specifications" section of the Proposer's proposal must include a detailed response to Sections 11.2 through 11.16 of this RFP. The Proposer shall identify any exceptions, limitations, dependencies, or additional costs associated with satisfying the stated specifications.

Please follow these instructions when preparing your response:

1. Use the same numbering and section headings as presented in the RFP (e.g., 11.2 Product Information, 11.3 General, etc.).
2. Respond to each item individually. If a feature is not currently available but is planned or in development, clearly indicate this and provide the estimated release date. Planned or proposed functionality shall not be represented as currently available. The Proposer shall distinguish between committed development and anticipated enhancements and identify any material dependencies affecting the proposed release date.
3. If a feature is not supported, state "Not supported" and, if applicable, suggest any available workarounds or alternatives. The Proposer shall identify any additional software, licensing, integration, or costs associated with a proposed workaround or alternative.
4. Where appropriate, include screenshots, diagrams, or links to demonstration environments to support your responses. Any demonstration materials shall accurately represent the functionality of the version being proposed.
5. If multiple products or modules are proposed to meet the requirements, clearly indicate which product addresses each feature or function. The Proposer shall identify whether each product or module is included in the proposed pricing, requires an additional fee, or is provided by a third party.
6. Ensure all responses are complete, accurate, and reflect the current version of the proposed system. The Proposer shall identify the software version or release upon which its responses are based and disclose any material limitations or qualifications.

SWAN reserves the right to request clarification, additional documentation, or demonstrations to verify the accuracy and completeness of the Proposer's responses. Any material exceptions or qualifications to the specifications must be expressly identified in the proposal.

The Proposer's responses may be used by SWAN in evaluating proposals and establishing the functional and performance requirements of any resulting agreement. No representation, specification, or commitment shall become contractually binding except to the extent incorporated into the final executed agreement.

11.2 Product Information

Provide a comprehensive list of all products and/or modules proposed in response to this RFP. For each product or module, identify its name, current version, developer or provider, intended function, and whether it is included in the proposed pricing or requires an additional license, subscription, or other charge. Identify any third-party products or services necessary to provide the proposed functionality.

1. Demonstration system sandbox availability: Indicate whether a demonstration instance of the proposed system can be made available for assessment purposes. If yes, please provide a description of the demonstration environment, the functionality available for evaluation, and the procedures for obtaining secure access. SWAN may request access to a demonstration environment during the evaluation process.
2. Functionality Across Products: If multiple products are proposed to fulfill the same function (e.g., a desktop client versus a web-based client), clearly indicate which requested features are available for each product/platform. Identify any differences in functionality, licensing, support, or compatibility between the proposed products or platforms, including any limitations that could affect SWAN or its member libraries.

The Proposer shall identify any material dependencies among the proposed products or modules and explain whether SWAN may license or use them independently. Any additional costs or restrictions associated with such dependencies shall be disclosed in the pricing proposal.

11.3 General

1. Describe the minimum and recommended computer workstation requirements for staff access to the ILS and analytics. Identify any additional hardware, software,

operating system, or licensing requirements and any anticipated changes to these requirements during the proposed contract term.

2. Will all modern web browsers work equally well to access the system? If not, please explain. Identify supported browsers and versions and describe any material limitations or differences in functionality.
3. Is there a software client that needs to be loaded on library computers to run the ILS? Or are staff clients web-based? Are there different clients for different modules? Identify any installation, maintenance, or update responsibilities that would remain with SWAN or its member libraries.
4. Are there any mobile staff interfaces? If so, what functionality do they provide?
    a. What systems are supported (e.g. Android, Apple) and is one platform favored over others?
    b. Are there any limitations with the mobile staff interface with peripherals, such as printers, barcode scanners, etc.?
5. Identify any additional licensing, subscription, equipment, or support costs associated with mobile staff functionality.
6. How is the system optimized for a multi-institution consortium environment, specifically regarding configuration, reporting, and staff workflow? Describe how the system accommodates different policies, permissions, and operational requirements among member libraries while maintaining appropriate consortium-wide administration and oversight.
7. Are terms, field labels, instructional text, or other items customizable within the staff interface, and to what extent?
8. Describe the ILS architecture and configurability of staff permissions. Explain whether permissions can be assigned by role, individual user, member library, or consortium-wide administrator, and describe the procedures for granting, modifying, and revoking access.
9. Do the ILS and analytics solutions support single sign-on (SSO) with an identity service provider? Identify supported authentication standards and any additional costs or technical requirements associated with implementation.
10. Describe the system’s audit trail capabilities. Specifically, detail how changes to patron accounts, bibliographic records, and item records are tracked, including access to Personally Identifiable Information (PII). Identify what information is recorded in the audit logs, how long such records are retained, who may access them, and whether logs can be exported for security investigations or compliance purposes. Describe any limitations on SWAN's ability to review access to patron information or investigate unauthorized activity.

11. Can a user choose to only see locations, item types, and patron types that their library uses?
12. Does the system support the generation of unique item and patron IDs, where the ID is automatically prefixed according to the specific library system at the point of creation? If so, can these IDs be printed as a scannable barcode?
13. Describe the system's capabilities for protecting patron information and other sensitive data, including role-based access controls, encryption, and the ability to restrict access to patron records across member libraries. Identify any limitations on implementing different privacy or access policies for individual member libraries.
14. Describe how the system supports printing and/or exporting from the staff interface, such as printing a list of item search results or exporting patron checkouts. Can the print or export field display be customized?
15. Does the ILS provide embedded training in the staff client, such as tooltips or feature tutorials?
16. Describe how Artificial Intelligence (AI) and Machine Learning (ML) are currently used or planned for the proposed system. Identify each AI or ML feature, whether it is currently available or planned, and whether its use is optional or may be disabled by SWAN. Describe what patron, circulation, bibliographic, or other SWAN data may be processed by AI or ML systems, whether such data is shared with third parties or used to train or improve AI models, and what controls are available to SWAN over such use. Identify any additional costs associated with AI or ML functionality.

11.4 Patron Privacy

1. How long are patron transaction details (profile updates, circulations, holds) maintained in the system? Can these settings be customized? What manual and automated options exist to purge or anonymize this information? Describe whether retention periods and deletion or anonymization settings can be established separately for individual member libraries and whether such settings apply to backups, reporting databases, analytics platforms, and other systems containing patron information. Identify any limitations on permanently deleting or anonymizing patron transaction information.
    - What options exist to limit access to transaction history or visibility of patron data based on login permissions?
        - In the ILS?
        - In the reporting platform?
2. Describe whether access permissions can be established by staff role, individual user, member library, or consortium-wide administrator. Explain whether access to

patron information can be restricted across member libraries and whether the system maintains audit logs identifying who accessed or modified patron records.

3. Please share your privacy policy. Also provide any applicable data protection, information security, and data retention policies governing the proposed system. Identify whether the Proposer or any third-party service provider may access, use, disclose, or retain SWAN patron information for purposes other than providing the contracted services.
4. How are patron passwords set and updated? Are either viewable by staff in the ILS or via direct database query? What options exist to mask and/or encrypt these? Describe how patron passwords and other authentication credentials are protected, including whether passwords are stored using secure, nonreversible hashing methods. Identify any circumstances under which passwords or other authentication credentials may be accessed by the Proposer, its personnel, or third parties.
5. Is patron data used to train AI models? If so, is it anonymized, and is there an option to opt out? Identify whether patron information, circulation records, search histories, or other SWAN data may be transmitted to third-party AI providers or used to develop, train, test, or improve AI or machine learning systems. Explain whether such uses are enabled by default and whether SWAN may prohibit them entirely. Identify any data retention or deletion practices applicable to AI-related processing.
6. Describe what precautions you take regarding patron privacy when partnering with other organizations for implementation projects. Identify the categories of third parties that may receive access to SWAN data during implementation, migration, hosting, maintenance, or support. Describe the contractual, technical, and administrative safeguards used to protect such information, including confidentiality obligations, access restrictions, and procedures for terminating third-party access when it is no longer necessary.
7. Identify any material limitations on compliance with applicable patron confidentiality and data protection requirements. Describe procedures for notifying SWAN of any actual or reasonably suspected unauthorized access to, disclosure of, or loss of patron information, including the anticipated timing of such notification and the assistance it will provide in investigating and responding to an incident.

11.5 Product Development Process

1. What is your product release cycle? Describe the frequency of major releases, minor updates, security patches, and emergency fixes. Identify whether releases are controlled by the Proposer or by another software developer or maintainer, and

explain how customers are notified of upcoming releases and any anticipated service interruptions.

2. How are customers involved in ongoing product development? Are they involved in prioritizing features and bugfixes? Are they involved in testing before releases take place? Describe any customer advisory groups, development committees, user communities, or other mechanisms through which customers may submit requests and influence development priorities. Explain how customer feedback is evaluated and communicated to the developers or maintainers of the proposed software.
3. How are the needs of consortia considered in the development process? What are recent examples of development that has been designed for or around consortia? Describe how requests involving multiple member libraries, differing local policies, and consortium-wide administration are evaluated and prioritized.
4. Is there a process to purchase custom development outside the release schedule and priorities? Describe. Identify who would perform such development, how costs and schedules are established, and whether SWAN would have any rights to use, maintain, or modify the resulting functionality. Explain whether custom development would be incorporated into future standard releases and whether additional maintenance or support charges would apply.
5. Are new features made available to all customers? Do any require cost increases or add-on purchasing? If so, what are some examples released in the last year? Describe how new features are licensed and priced, including whether functionality previously included in the base system may subsequently become subject to additional charges. Identify any differences in feature availability or pricing for customers using third-party hosting or support providers.
6. Do you have a public changelog of features and bugfixes? If not, are you able to share recent changelogs from the past year? Describe how SWAN would receive ongoing information concerning software changes, known defects, security updates, and planned enhancements. Identify whether release notes and other technical documentation are available before updates are implemented.
7. If the Proposer does not directly control software development, it shall identify the entity or entities responsible for development and maintenance and describe the arrangements through which the Proposer obtains updates, reports defects, requests enhancements, and coordinates the resolution of software issues. The Proposer shall explain how it will fulfill its contractual support and maintenance obligations notwithstanding its reliance on third-party developers or maintainers.

11.6 Accessibility & Usability

1. Can all staff functions be completed through a web-based interface? Please elaborate. Identify any functions that require a separate desktop application, browser extension, or other software, and explain any differences in accessibility or functionality.
    a. What native web functionality is supported (e.g. back button, highlight and copy/paste, etc.)
2. Are the staff clients WCAG 2.2 AA compliant? Provide a recent Accessibility Conformance Report (ACR) or Voluntary Product Accessibility Template (VPAT) for the current version. Identify the date and version of each accessibility assessment, whether testing was conducted internally or by an independent third party, and any known accessibility deficiencies. Explain how accessibility issues are reported, prioritized, and corrected.
    a. If the system is not currently fully WCAG 2.2 AA compliant, please provide a remediation roadmap with estimated timelines for achieving compliance.
3. Are the staff clients fully compatible with screen readers and other assistive technologies? Identify the assistive technologies and versions tested, any known compatibility limitations, and available alternatives or accommodations.
4. Are the staff clients fully operable using only a keyboard? Identify any functions that cannot be completed without a mouse or other pointing device and describe any available alternatives.
5. Do the staff clients offer users the ability to customize their personal interface – such as adjusting font size, style, and color – to accommodate people with disabilities? Describe whether these settings are retained for individual users and whether customization affects the accessibility or functionality of other system features.
6. Describe multi-tasking capabilities and staff efficiencies within the staff client, for example keyboard shortcuts, menu customizations, multiple browser tabs, etc.
7. Describe any functionality to save or track browsing history, allowing staff to access previous patron records, item records, screens, etc.
    a. Can these settings be customized, such as setting the last 5 or 10 records?
    b. Can multiple screens or tabs be open at once?
    c. Can browsing history involving patron records be disabled, restricted, or automatically cleared? Describe how access to such history is controlled to protect patron confidentiality.
8. Do mobile versions of the staff client support native accessibility features, such as VoiceOver in iOS and TalkBack for Android?

a. What native mobile functionality is supported (e.g. back button, highlight and copy/paste, etc.)?

Identify any known accessibility limitations affecting mobile staff functionality and whether the mobile interfaces have been included in accessibility testing.

9. The Proposer shall identify any material differences in accessibility among the proposed ILS, analytics platform, mobile interfaces, and other products or modules included in its proposal. Where functionality is provided through third-party software, the Proposer shall identify the party responsible for accessibility testing and remediation.
10. The Proposer shall describe its process for receiving and addressing accessibility complaints or requests for accommodation and identify the support available to SWAN and its member libraries when accessibility barriers are discovered.

11.7 Cataloging

11.7.1 Bibliographic Records

1. Describe all available methods to import bibliographic records into the database, including MARC record importing, Z39.50, or any protocol that interfaces with OCLC WMS Record Manager or Connexion for this purpose. Identify any additional software, licensing, or fees required for these functions.
2. Is there functionality for bulk importing of MARC data with a .mrc file that includes item creation with various fields filled in based on information within a field contained in each individual MARC record (i.e. 947)?
3. Can staff create bibliographic record templates that can be selected when creating new records in which the system fills in select MARC fields with predetermined data, and prompts staff to fill in select other fields? If yes, describe.
4. Can existing records be copied or cloned to create a new record? If yes, can you choose to exclude fields in this process (001, 035, locally protected fields, etc.)
5. Describe how the system validates MARC fields and provides warnings or indicates errors, for example, invalid field tags and subfields, invalid ISBNs, unauthorized headings, etc.
6. When editing a bibliographic record, does the system include MARC field descriptions, detailed tag information, and options to view this information outside of the system (i.e. RDA Toolkit or Library of Congress)?
7. Can the order of MARC tags be automatically sorted by MARC field value, through manual intervention, or both?

8. Are MARC fields defined in accordance with the Library of Congress MARC standard? Is it possible to define or update definitions of MARC fields in configuration?
9. Define the number of entries a repeatable MARC tag can have within a bibliographic record. Does the system experience performance issues when a record contains many entries of any one repeatable field?
10. Describe the process for duplicate detection and prevention during and after cataloging. What level of permissions are needed to perform these tasks?
11. Can duplicate bibliographic records be merged and unmerged?
    a. Describe whether merged records can be restored.
    b. Describe whether the system maintains an audit log of record merges and related changes.
    c. Are there any item statuses, serial control, or open orders statuses that will prevent the merging of two records?
    d. What level of permissions are needed to perform these tasks?
12. Can local MARC fields be protected from overwrite during record merges or overlays? If yes, does the local field get duplicated when the record is overlayed with a record with the same exact local field value?
13. Can a record be marked as "Final" and not be overwritten by a MARC bib record load if there is a match? How does the system indicate whether a bib record has been fully cataloged or is still waiting for final cataloging?
14. Describe how the system supports Unicode characters, diacritics, and other character sets.
15. Does the system support indexing of all possible MARC tags? Is the creation of a new indexed field controlled by SWAN or is it vendor controlled?
16. Does the system provide real-time indexing as records are added or updated or is there a significant delay or require overnight processing?
17. Describe how different users/logins are permitted or prevented from creating, editing or deleting different types of bibliographic records. Identify whether these permissions can be established by role, individual user, member library, or consortium-wide administrator.
18. Are there any factors that would prevent a bibliographic record from being deleted from the system when someone is attempting to remove it? If so, please list them.
19. How are orphaned bibliographic records handled, i.e. records with no items or holdings?
    a. Does last-item deletion remove the bibliographic record?
    b. What cleanup reports or processes are available?

20. Does the system provide functionality to copy and paste fields when creating or modifying bibliographic records. If there are limitations on copying or pasting multiple fields or subfields, please describe them.

11.7.2 Item Records

1. Can staff create item record templates that can be selected when creating a new item record in which the system fills in select fields with predetermined data? If yes, describe.
2. Explain how the system supports structured call number fields (e.g., prefix, main, suffix). What is the character limit? What defaults can be set at an individual library level?
3. Can the system print call number spine labels directly? If yes, please describe the process and specify which data fields can be pulled from, what can be customized on the label (line breaks, font, alignment, etc.), and the number of setups/templates that can be saved for regular use.
4. Does the system allow multiple items with sequential barcodes to be entered at the same time?
5. Does the system allow multiple items with pre-set field content (item types, categories, call numbers, etc.) to be created at once?
6. What is the limit to the number of items that can be attached to one bibliographic record? Does a large number affect system performance, and if so at what number is this noticeable?
7. Does the system allow transfer of single or multiple items from one bibliographic record to another? If yes, does this transfer include all holds?
8. Are there any item statuses that prevent items from being transferred?
9. Describe how different libraries are prevented from editing or deleting each other's items, holdings, and order records. Explain whether SWAN administrators can establish and enforce different permissions for individual member libraries and whether unauthorized attempts to modify records are logged.
10. Are there any factors that would prevent item record from being deleted from the system when someone is attempting to remove it? If so, please list them.
11. How are new items handled in the system? Are they identified using item type/category, or is it a separate data point?
12. Describe available functionality to automate the conversion of new items to regular items.
13. Describe functionality around item record notes. How are they displayed based on audience (public notes, staff notes, etc.)? What options exist to add multiple notes, customize fields, etc.

11.7.3 General Cataloging

1. Can user permissions be limited to editing specific tags or specific subfields?
2. Can a user choose whether they see the description/names instead of codes where both exist for fields such as location, item type, etc.?
3. Describe the permissions required to perform bulk changes, whether changes can be previewed or validated before execution, and whether the system maintains audit logs or provides options to reverse erroneous changes.
4. What administrator tools are available to perform bulk editing of:
    a. MARC Data (Bibliographic and Holdings)
    b. Item Records, including notes
    c. Call Numbers
5. Describe the system's macro capabilities for repetitive tasks.
6. What methods does the system have available to suppress records from the online catalog for bibliographic records and item records.
7. When searching for bib records within the ILS, what identifying information is displayed in initial results that can be browsed before entering the full record?
    a. Is there any customization available to administrators to determine what is displayed for all users?
8. Identify any material limitations, additional modules, third-party products, or separate charges associated with the cataloging functionality described above. Any such costs shall be included in the pricing proposal.

11.8 Authority Control

1. Describe the authority control processes available in the system. Identify which processes are automated and which require staff intervention, and whether authority control functionality is included in the proposed system or requires additional software or services.
2. Explain how the system handles unauthorized headings. What tools are there to report on them? Describe whether unauthorized headings can be reviewed and corrected individually or in bulk.
3. Describe whether authority records may be imported individually or in bulk, whether automated loading or updating is supported, and whether any third-party services are required.
4. Are authority records created automatically when new headings appear in the catalog? If yes, what are their statuses and how does the system utilize this status?
5. Does the system support Library of Congress Subject Headings, Library of

Congress Children's Subject Headings and MeSH? What thesauri, e.g. Homosaurus, OLAC headings are supported? Does the system support custom vocabularies? Describe whether multiple authority vocabularies can be maintained simultaneously and whether SWAN can establish different authority control practices for particular collections or member libraries.

6. Does the system provide automated updates to headings in bibliographic records when authority records are added or updated? If yes, describe. Explain whether automated updates can be reviewed or approved before implementation, whether changes are recorded in an audit log, and whether erroneous updates can be reversed.
7. Describe how the system performs global headings change for all heading types in a database that contains multiple subject vocabularies, i.e. LCSH, LCSHCH, MeSH.
8. Describe how authority data is used when searching in the staff client. Identify whether authority records support cross-references, alternative headings, and navigation among related terms.
9. Identify any material limitations, third-party dependencies, additional licensing requirements, or separate charges associated with the authority control functionality described above. Any such costs shall be disclosed in the pricing proposal.

11.9 Circulation

11.9.1 Patron record management

1. Describe how permissions and access to patron records can be customized for a consortium of mixed library types. Identify whether access can be restricted by member library, staff role, individual user, or specific categories of patron information, and whether access to and modifications of patron records are recorded in an audit trail.
2. Can patron records be merged? If yes, describe functionality around current checkouts, checkout history, holds, and fines or fees, including how the system handles conflicting data during the merge process (e.g. different addresses). Explain whether merges can be reviewed before completion, whether the system maintains a record of the original patron information, and whether an erroneous merge can be reversed.
3. Can patrons have multiple barcodes or IDs associated with their accounts (such as a school ID and library barcode)? Describe whether individual identifiers can be added, deactivated, or removed without deleting the patron account.

4. Can the patron last activity date be updated based on online activity, such as logging in through SIP or API?
5. Describe alerts in the staff interface for patrons that are not in good standing and options to override, dismiss, or acknowledge. Identify whether permissions to override restrictions can be established by staff role or member library and whether overrides are logged.
6. Describe functionality around circulation and patron record notes.
    a. How are they displayed based on audience (public notes, staff notes, etc.)?
    b. What options exist to add multiple notes, customize fields, etc.
    c. Are notes available for checkout, transit, and/or other circulation functions?
    d. Can notes be updated in bulk?
    e. Describe whether access to sensitive or confidential notes can be restricted and whether changes to notes are tracked.
7. Describe functionality to store patron language preference and share with other systems (discovery layer, notifications, etc.
8. Can the system support alphanumeric patron barcodes? Can the system support multiple types of barcodes?
9. Are there configurable options for barcode validation, such as pattern recognition, number of digits, etc.?
10. Describe the process for searching for patrons and utilities to check for existing records. Describe any controls intended to prevent unauthorized access to patron information through search functions.
11. Are there utilities to bulk import, update, and remove patron records? Describe the permissions required, available validation and error-reporting tools, and whether bulk changes can be reviewed or reversed.
12. Describe any functionality around card groups, such as family groups, and how these might integrate with or complement the discovery platform. Explain how access to information concerning individual members of a group is controlled, including whether one group member may view another member's circulation or account information.
13. Does the system support collecting and storing signatures and/or patron photos? If yes, describe how such information is stored, protected, accessed, retained, and deleted, including whether collection of this information is optional.
    a. Describe staff efficiencies for patron record creation, such as keyboard shortcuts, cloning records, customizable templates, required and pre-populated fields, and auto-populating information from an ID scan.
    b. Describe how any patron templates can be customized based on patron fields

c. Identify whether the use of ID scanning or other automated data collection requires additional hardware, software, licensing, or third-party services.

11.9.2 Loan rules

1. Generally describe how loan rules work within your ILS.
2. Describe how loan rules can be customized based on checkout library, item library, patron types, or other factors. Include loan duration, renewal limits, autorenewal settings, daily fines, maximum fines, and notices.
3. Can the system assign loan rules (renewals, durations, fines, and notices) based on the checkout library settings?
4. Describe all options for setting circulation limits, including at the consortium level, library or patron type level, etc. Can patron checkout limits by item type be set based on criteria other than patron type – such as age?
5. Can items have item types that limit checkouts based on a specific time range? For example, a patron can only check out a museum pass item type every six months.
6. Describe the process to create and checkout "on the fly" items, and what happens when these items are returned.
7. Describe how the system handles item statuses, including checked out, transit, missing, display, in processing, etc. and impact on the system functionality such as holds, checkouts, etc. Identify whether item statuses and their associated circulation restrictions can be customized at the member library level.

11.9.3 Search functionality

1. Describe search capabilities for item holdings, including grouping and sorting capabilities. Are item covers included?
2. Describe multi-tasking capabilities and staff efficiencies within the item search capabilities, such as autosuggestions for search terms and personal customization of the fields displayed in results
3. Does the system support saved searches and/or saved filters? Can these be customized on a consortium, library, and/or user level?

11.9.4 Billing

1. Describe how bills are attributed in a multi-library consortium and how payments are recorded. Are bill reason, item-owning library, payment library, bill-owning library, checkout library, and patron library all recorded and reportable? Explain how the system supports financial reconciliation and reporting among member libraries, including the identification and correction of payments attributed to the wrong library.

2. Does the system support partial payments? Describe how they are distributed, reported, and how they can be customized (e.g. disabled for certain bill types). For multiple payments on a single bill, what attributes are recorded?
3. Does the system support the retention of item data in a patron's financial history (charges/payments) even if the associated item is deleted? Describe the retention and deletion options for this information, including any ability to preserve financial records without retaining unnecessary patron transaction details.
4. Can billed items be deleted from a patron's record while still retaining the bill with relevant information?
5. Describe the process of removing long-overdue items.
6. Does the system support billing notes, and are they searchable and reportable?
7. Describe options for fines payments and vendor integrations. Identify any third-party payment processors or services required, applicable transaction fees, and whether payment processing is included in the proposed pricing.
8. Describe the process for billing for an item or a service that is not in the system.
9. What bill information is editable after creation through the staff interface? Describe whether edits, adjustments, waivers, refunds, and deletions are recorded in an audit trail identifying the user, date, and nature of the change.
10. What attributes in the bill table are not reportable?
11. Are lost/missing item bills automatically cleared with a check-in or a renewal? What reason is used for the apparent payment? Can that reason be made inaccessible to staff?
12. Describe the system's controls for protecting payment information, including whether payment card information is stored or processed by the ILS or by a third-party payment processor. Identify the party responsible for applicable payment card security requirements and describe how SWAN and its member libraries are protected from unauthorized access to payment information.

11.9.5 Additional circulation features

1. Describe how the system and staff client support offline circulation, including functions available while offline and any additional software needed. Explain how transactions are stored and protected while offline, how they are synchronized when connectivity is restored, and how duplicate or conflicting transactions are identified and resolved.
2. Describe any homebound or outreach functionality.
3. Describe any functionality around processing and circulating damaged items.
4. Describe any functionality around checking out items not held by the consortium, e.g., items sent via interlibrary loans.

5. Does the system support checking out “ephemeral” items that will not be returned such as seed packets?
6. How does the system handle temporary shelving locations, such as display shelving, floating collections, etc.?
7. Describe inventory functionality and processes; Is any additional software required and/or can all inventory processes be completed using a mobile device and web interface? Identify any additional hardware, software, licensing, or fees required.
8. Describe RFID support and features. What RFID features are natively available within the staff client? Identify any third-party integrations or additional charges necessary to support the described functionality.
9. Describe functionality around item transaction history, including item checkout and holds history. What fields are recorded and where is it recorded? What search and filtering capabilities are there within the system? Describe how long this information is retained, whether retention settings can be customized, and whether access to transaction history can be restricted based on staff permissions or member library policies. Identify options for purging or anonymizing transaction history.
10. Identify any material limitations, third-party dependencies, additional licensing requirements, or separate charges associated with the circulation functionality described above. Any such costs shall be disclosed in the pricing proposal.

11.10 Circulation Slips & Receipts

1. Describe the types of circulation slips and receipts the system supports. Identify whether each type can be generated in printed or electronic format, e.g., email or SMS.
2. Describe customization options – including font size, logos, custom text, or any other options – for circulation slips and receipts for the following:
    a. Checkout
    b. Checkin
    c. Transit
    d. Hold
    e. Payments
3. Describe the process of customizing circulation slips and receipts and available permissions.
    a. Describe whether templates can be established separately for individual member libraries and whether changes can be previewed or tested before implementation.
    b. Identify whether permissions can be assigned by staff role, individual member library, or consortium-wide administrator.

4. Can circulation slips be disabled and/or customized on a per library basis? On a consortium-wide basis? On a staff workstation basis?
5. What data fields can be added to circulation slips? Identify whether particular fields containing patron information can be excluded, truncated, or masked to protect patron confidentiality.
6. Can circulation slips be printed without staff interaction (i.e. silent printing).
7. What peripherals for printing circulation slips are supported, and to what extent can different slips be routed to different peripherals (i.e. can hold wrappers go to a sticky receipt printer while checkout slips go to a regular receipt printer). Identify any additional software, drivers, licensing, or other requirements necessary to support the described functionality.
8. Can circulation slip printing be configured on a workstation, library, and consortium-wide basis?
9. If a patron has requested email or SMS notifications, can a slip not be printed? If so, describe the workflow. Explain whether these preferences can be established by individual patrons or member libraries and whether they can be overridden by authorized staff.
10. Can the system print hold shelf wrappers? What data fields can be added, and how can patron information be truncated or masked? Describe whether SWAN or individual member libraries can establish default privacy settings for hold shelf wrappers.
11. Describe customization options for email receipts. Identify whether email receipts can be configured separately by member library and whether patron information included in such receipts can be limited or masked.
12. Describe any cost-savings functionality for receipts (i.e. “you saved X by using your library”). Explain how the savings amount is calculated and whether individual member libraries can customize or disable this functionality.
13. Identify any material limitations, third-party dependencies, additional licensing requirements, or separate charges associated with the circulation slips and receipts functionality described above. Any such costs shall be disclosed in the pricing proposal.

11.11 Holds

1. Describe the process for placing holds in your system.
    a. Are holds placed at the bibliographic, item, or volume level?
    b. Can holds be converted from one level to another?
2. Describe how holds work with multi-volume book sets and periodicals. How are differing volumes identified and grouped for the purposes of fulfilling holds?

3. How are holds prioritized in a multi-library system? Describe whether hold prioritization rules can be established and modified by SWAN at the consortium level and, where permitted by SWAN, by individual member libraries.
    a. How can hold priorities be customized based on patron fields, home library, etc.?
    b. How can hold priorities be customized based on item types or statuses (e.g. new items prioritized for home library patrons)?
    c. If an item is checked in at a library that does not own the item, how will that affect hold fulfillment?
    d. What options exist to minimize item transits between libraries and fulfill patron holds most efficiently?
    e. Are on-shelf titles at a patron's pickup library given priority in holds fulfillment? Home library?
4. If an item is in transit to a patron at a library, but that library checks in another copy of the item before it arrives, will that checked-in item be able to fill the hold? Explain how the system prevents duplicate fulfillment or unnecessary transfers in this situation.
5. Can hold pickup locations be limited based on the type of item?
6. Describe all options for setting hold limits, including at the consortium level, library or patron type level, etc.
7. Can holds be limited based on the home library of the patron?
8. Describe batch holds placement capabilities. Does the system allow:
    a. Batch holds placement across multiple titles for one patron, such as selecting results in a search and placing all on hold for a patron?
    b. Batch holds placement for multiple users on one item?
9. Does the system allow for placing holds on multiple copies of the same item for one patron (e.g. for book clubs or teachers)? If so, is there any special functionality for tracking these holds?
    a. How can permissions for multiple holds be customized by patron fields (i.e. limiting this capability to certain patron types)?
10. Can a patron choose to have a hold automatically placed on any new title by a particular author?
11. Can holds be edited in batch? What aspects of a hold can be edited in this way? Does it apply to freezing/suspending holds, pickup dates, and pickup locations? Describe the permissions required to perform bulk changes and whether changes can be reviewed or reversed if made in error.
12. What options exist to cancel holds for items that have not been retrieved by the patron? What options exist to cancel holds that have not been fulfilled for a long

period of time? Describe whether cancellation periods and related patron notifications can be configured separately by member library.

13. Can patrons retain their position in queue for items returned from transit (e.g. an item arrives damaged or with a locked case, etc.)
14. Can holds be transferred from one bibliographic record to another? Can this be done in bulk? Are there options to dynamically move holds based on certain criteria? Explain how the system preserves hold priority and other relevant information when holds are transferred.
15. How can holds pull/pick lists be customized? Do you have options for pull lists optimized specifically for use on mobile devices? Explain whether lists can be generated separately for individual member libraries, branches, or pickup locations. Describe whether patron information displayed on printed or electronic pull lists can be limited or masked.
16. What happens to holds when the last available item is lost or discarded? Is there a built-in mechanism to notify patrons of holds no longer available for these reasons?
17. Is patron hold history tracked? What options exist to purge this data? Describe whether retention periods can be customized and whether hold history can be automatically deleted or anonymized, including in reporting and analytics systems.
18. Can the number of holds a patron has at a given time be limited? Are those limits configurable by patron type, item type, or bibliographic format?
19. Are item renewals or automatic renewals limited if a hold exists on an item? Does the existence of other available copies of that item affect those limits?
20. What options exist for multiple pick-up locations in a single library, for example lockers, drive-up windows, and bookmobiles? Identify any additional software, hardware, integrations, or licensing required to support these pickup options.
21. Can holds be placed on items on-order. What is required to make this possible (item records, barcodes, etc.)?
22. Does the system support notes on holds? Can those notes be modified after the hold is created? Can they be included for printing in circulation slips? Describe whether hold notes can be restricted to authorized staff, whether changes are logged, and whether notes can be automatically deleted when the associated hold is completed or canceled.
23. Does the system offer functionality to estimate hold wait times for a patron?
24. At the time of cataloging, does adding a new item to the system trigger a hold placed on the record?
25. Identify any material limitations, third-party dependencies, additional licensing requirements, or separate charges associated with the holds functionality described above. Any such costs shall be disclosed in the pricing proposal.

11.12 Acquisitions

1. Does the system support EDI invoicing and/or EDIFACT? Please list supported vendors and formats. Identify any additional software, third-party services, licensing requirements, or fees necessary to support these functions.
2. Describe how the system prevents duplicate EDI orders from being sent to a vendor. Explain how duplicate orders or transmissions are identified and corrected and whether the system maintains a record of such transactions.
3. Are there API connections available in lieu of EDI for order loading? Identify any additional software, third-party services, licensing requirements, or fees necessary to support these functions.
4. When matching incoming order records on fields like the ISBN and UPC, does the system look at all entries, or only the first one?
5. Can the system import and process more than one order at a time? Describe any limitations on the number of orders that can be uploaded simultaneously.
6. Describe how the system handles incoming order records when there is an existing bibliographic record in the system for that title.
7. Describe the process of receiving items.
    a. Are there multiple fields that mark an order "closed"?
    b. Can the system support batch receiving order lines, allowing staff to receive multiple order lines simultaneously rather than one at a time?
    c. Can the system flag newly received items with holds, and differentiate holds at the consortium level and local level?
    d. Describe the process of manually creating an order and an invoice. Identify whether permissions to create, modify, approve, or delete orders and invoices can be established by staff role or individual member library.
8. Describe the order cancellation process.
    a. If on-order items are created at the time an order is created, are they automatically removed upon cancellation?
    b. Describe how canceled orders affect outstanding encumbrances, fund balances, and associated bibliographic or item records.
    c. Does the system support batch cancellation of orders and order lines?
    d. Describe the process for canceling multiple orders or order lines simultaneously, including impacts on encumbrances, expenditures, fund balances, vendor records, and audit trails.
    e. Identify the permissions required to perform batch cancellations and whether the system provides an opportunity to review or confirm proposed changes before execution.

9. What reporting options are available for displaying expenditures, encumbrances, and balances by fund for the current and past fiscal years? Explain whether reports can be generated separately for individual member libraries and whether historical financial information remains available following fiscal year close.
    a. Can they be exported as a .csv?
    b. How many fiscal years are available for reporting?
10. Does the system allow creating orders without creating bibliographic/item records?
11. Does the system allow holds on order records without an item attached to the bibliographic record?
12. What is the fiscal close process like in your system? What happens to outstanding orders? Is there a file structure for the orders that contain a fiscal year as a prefix or another section of the order name? Describe whether fiscal year closing procedures can be performed separately for individual member libraries and whether outstanding orders and encumbrances can be carried forward or otherwise accounted for in subsequent fiscal years.
13. Identify any material limitations, third-party dependencies, additional licensing requirements, or separate charges associated with the acquisition's functionality described above. Any such costs shall be disclosed in the pricing proposal.

11.13 Serials

1. Describe how serial prediction patterns are created and managed. Identify whether prediction patterns can be established and modified separately for individual member libraries and whether templates or existing patterns can be reused.
2. Describe how MARC holdings records are created, updated, imported, exported, and maintained, including whether holdings information can be managed separately for individual member libraries.
3. If a publication pattern changes, explain how the pattern can be updated for all locations subscribing to the serial. Describe whether updates can be applied selectively to particular locations and whether proposed changes can be reviewed before implementation.
4. If a location typically receives one copy of a serial and a second copy comes in, explain how the library can add the second copy.
5. Describe whether routing lists per serial can be customized and maintained separately for individual member libraries. Does the system support routing serials to a specific list of staff members?
6. Can one location check in serials for another location, such as for a branch

library? Explain the process. Identify whether permissions for this functionality can be established by member library or staff role.

7. Explain the process for adding supplements, special issues, and combined issues. Can call numbers be standardized across multiple libraries for these?
8. Can a serial be received/checked in without it being added to the catalog? Identify whether permissions for this functionality can be established by member library or staff role.
9. Does the staff client allow staff to place a specific volume of a serial on hold without placing a copy-specific hold? Explain if the system can handle variances to the volumetric.
10. Is there any component of managing serials that will prevent a bib record from being deleted if the final item on the bib record is set to be discarded?
11. Describe how the system handles non-standard patterns or frequency changes. Explain how the system addresses missed, delayed, or irregular issues and whether staff can manually adjust predictions without affecting other locations.
12. Describe how the system handles claims.
    a. What reporting options are available for claims?
    b. What formats are available for exporting results?
13. Identify any material limitations, third-party dependencies, additional licensing requirements, or separate charges associated with the serials functionality described above. Any such costs shall be disclosed in the pricing proposal.

11.14 Notices

1. SWAN currently uses Unique Management's MessageBee for phone, SMS, e-mail, and print notifications. Identify whether the integration is currently supported and in production, whether additional software or services are required, and any associated implementation or ongoing costs. Describe the measures used to protect patron information transmitted through integration.
2. Describe any native functionality within the system for phone, SMS, e-mail, and print notifications.
3. Can your system generate e-mail, print, and SMS notifications for holds, overdue items, bills, and courtesy notices (items due soon)? Identify whether these notifications are generated directly by the proposed system or require third-party services.
    a. What options exist for customizing these notices with wording, library branding, cover art, custom graphics? Can libraries customize notices themselves? Describe whether individual member libraries can establish and

maintain separate notice templates and whether changes can be previewed or tested before implementation

b. Are notices available in multiple languages? What determines the language of a notice?
c. What fees are associated with notices of each type? Identify any per-message, per-transaction, subscription, third-party service, or other recurring charges and whether those charges are included in the pricing proposal.
d. How can patrons update their notice preferences? What options exist if a patron opts out of notices of a particular type? Describe whether notice preferences can be managed separately for different categories of notifications and whether the system maintains a record of patron preferences and changes.

4. Can staff generate a list of hold notices for patrons who do not receive them by e-mail, SMS, or print? Describe whether access to such lists can be restricted based on staff permissions or member library.
5. Are notices available to be sent on demand as well as scheduled? Describe whether notice schedules can be customized separately for individual member libraries and whether authorized staff can suspend, delay, or resend notices.
6. Can the system automatically update notice preference if one form fails (e.g. send phone if email fails)?
7. Describe how the system tracks the generation, transmission, and delivery status of patron notices. Explain whether failed or undelivered notices can be identified, reported, and resent, and whether staff can review notice history for individual patrons.
8. Describe how the system protects patron confidentiality in electronic and printed notices, including whether SWAN and individual member libraries can control the information included in notices and whether patron information transmitted to third-party notification providers is subject to appropriate security and confidentiality protections.
9. Identify any material limitations, third-party dependencies, additional licensing requirements, or separate charges associated with the notices functionality described above. Any such costs shall be disclosed in the pricing proposal.

11.15 Automated Maintenance

1. Do you have a Routine Administrative Task Scheduling (RATS) outline or similar documentation that you can share? Identify which maintenance tasks are

performed automatically by the system, which are performed by the Proposer, and which remain the responsibility of SWAN or its member libraries.

2. Describe how bibliographic and authority records are indexed. What maintenance processes govern this, and what expectations can we have with a collection of our size? Identify any anticipated performance impacts, processing delays, or additional maintenance requirements associated with SWAN's database size.
3. Describe the process for discarding items. What options exist to customize this process with regard to method and timing? Are discarded items recorded in any way? Describe whether discard rules can be established separately for individual member libraries and whether records of discarded items remain available for reporting or auditing purposes.
4. What options exist to automate the removal or editing of items that have been long overdue, lost, claims returned, or missing in transit after a certain period of time? Explain whether automated changes can be reviewed before execution and whether the system maintains logs identifying affected records and actions taken.
5. Each year, SWAN runs patron information through National Change of Address processing to capture patrons who have moved and update their records accordingly. Do any of your current customers do this? Describe how it is accomplished in the ILS. Identify any additional software, third-party services, or fees required and describe how patron information is protected when transmitted for processing.
6. Describe the patron cleanup/removal process. Each month, SWAN removes patrons who have no activity for 5 years and who have a total bill under a certain amount. We report on patrons who will be removed to our libraries for their review and purge the patron records after a short period of review time. How can this be accomplished in your system? Describe whether SWAN can establish the criteria and timing for this process. Explain whether patron information removed from the ILS is also deleted or anonymized in reporting and analytics platforms and other systems maintained by the Proposer.
7. Describe the general visibility of system maintenance processes. What logs are available? Identify whether SWAN administrators can review, search, and export maintenance logs and whether those logs identify the date, time, nature, and results of automated or manually initiated maintenance activities.
8. Describe any maintenance processes or recommendations you make that require system downtime. How often does this occur, and how much downtime is generally required? Please provide recent examples. Explain how scheduled maintenance is communicated to SWAN, whether maintenance windows can be coordinated with

SWAN, and whether maintenance activities affect access to the ILS, reporting platform, or other services.

9. Identify any automated maintenance processes that may result in permanent deletion or material alteration of SWAN data and describe the safeguards available to prevent unauthorized or erroneous changes.
10. Identify any material limitations, third-party dependencies, or additional charges associated with the maintenance functionality described above.

11.16 Reporting & Analytics

1. Describe your available reporting platforms, whether native to the ILS or any that are provided with your service platform through a third party tool. Identify the developer and provider of each reporting platform, whether it is included in the proposed system, and any additional licensing, hosting, maintenance, or support charges.
    a. What are the available options?
    b. Describe how available reporting tools harvest data. Are there delays, or is data updated live? Identify the expected frequency of data updates and any material differences between operational ILS data and information available through the reporting platform.
    c. Are data labels consistent between the ILS and outside reporting platforms?
    d. Is there ILS data that does not exist in a particular reporting platform? Identify any material categories of ILS data that cannot be accessed, queried, or exported through the proposed reporting tools.
    e. Describe how users are configured in your reporting tools. Is there a one-to-one relationship between ILS logins and reporting logins, or are they maintained separately? Explain whether reporting permissions can be restricted by staff role, individual member library, or consortium-wide administrator, including restrictions on access to confidential patron information.
    f. Describe the process of importing outside data into the reporting platforms. Identify any limitations on data formats, volume, or frequency and any additional costs associated with importing external data.
2. Describe SWAN's ability to access and export its data from the reporting and analytics platforms, including the available formats, frequency of exports, and any limitations or additional charges. Explain whether SWAN can obtain complete copies of its reporting data in a commonly used, machine-readable format without requiring proprietary tools or assistance from the Proposer.
3. Does the system support direct querying or editing of data through SQL querying or a dedicated API?

    a. Do these tools support the querying and editing of MARC data?
    b. Is there a web browser version of these tools?
    c. Describe any restrictions on access to underlying data, available APIs, or database structures, including whether SWAN can independently create custom queries and reports without assistance from the Proposer.
    d. Identify any additional licensing requirements or charges for such access.
4. Describe options to generate data visualizations. Identify whether visualizations can be customized, saved, shared, and exported and whether dashboards can be configured separately for individual member libraries or consortium-wide reporting.
5. Describe how report scheduling works. What options are available to send reports to specific users or groups of users? What formats can reports be sent in: Excel, CSV, JSON, etc.? Explain whether scheduled reports can be restricted to authorized recipients and whether reports containing confidential patron information can be protected against unauthorized disclosure.
6. Does the reporting tool consume ILS resources or impact ILS performance? Can reports that don't edit system data run simultaneously? Describe whether resource-intensive queries or reports can adversely affect the performance or availability of the production ILS and what safeguards exist to prevent such impacts.
7. SWAN performs quarterly bill reconciliation analysis to ensure that patron payments get resolved to the appropriate libraries no matter where they are paid. This requires detailed bill reporting. Is it possible to track and report payment type, payment method, payment library, bill library, and patron library in custom billing reports? Describe whether these fields and related transaction details are available for both current and historical financial records, including partial payments, adjustments, waivers, refunds, and payments made through third-party payment processors. Identify any limitations on generating or exporting the information necessary for reconciliation among member libraries.
8. Describe how the reporting and analytics platforms protect confidential patron information, including available methods for restricting access, anonymizing or aggregating patron data, and establishing retention and deletion policies. Explain whether patron information deleted or anonymized in the ILS is also deleted or anonymized in the reporting and analytics platforms.
9. Describe the availability of audit logs for reporting and analytics activities, including access to confidential patron information, report creation, data exports, and modifications to reporting configurations. Identify whether SWAN administrators can review and export such logs.
10. Describe how the reporting and analytics platforms are maintained, updated, backed up, and restored following a system failure. Identify any material differences

between the availability, security, disaster recovery, and support arrangements applicable to the reporting platforms and those applicable to the ILS.dentify any material limitations, third-party dependencies, additional licensing requirements, or separate charges associated with the reporting and analytics functionality described above. All such costs shall be disclosed in the pricing proposal.

11.17 3rd Party Integrations

1. Are the following protocols supported:
    a. TLS-SIP2
    b. REST API
    c. Z39.50

    For each protocol, identify whether support is included in the proposed system, requires additional software or licensing, or is provided through a third party. Describe any material limitations or restrictions on its use.

2. List any additional supported communication protocols. Identify any applicable technical standards, authentication requirements, or restrictions on access.
3. Describe any deep integrations or key vendor partnerships, especially those unique to your system. Identify which integrations are currently supported and in production, which require additional development or configuration, and which depend on third-party software or services. Describe how integrations are maintained and supported when either the ILS or the integrated product is updated.
    a. Does the system offer integrations with OCLC APIs, and what capabilities are supported (e.g. viewing ILL requests within the staff interface, maintaining holdings)?
4. What steps can 3rd party vendors take to obtain access to the ILS SDK and support? Describe the availability of API documentation, development tools, testing environments, and technical support for third-party developers. Identify any approval requirements, licensing restrictions, access limitations, or fees associated with these resources.
5. Describe the security controls applicable to third-party integrations, including authentication, authorization, encryption of data in transit, and restrictions on access to confidential patron information. Explain whether SWAN can approve, restrict, or revoke third-party access to the ILS and its data.
6. Describe the process for identifying, reporting, and resolving failures or compatibility issues involving third-party integrations. Identify the responsibilities of the Proposer and any third-party providers, including how the Proposer coordinates troubleshooting and resolution when an issue involves multiple systems.

7. Identify any additional licensing, implementation, maintenance, support, transaction, or other fees associated with third-party integrations. Explain whether existing integrations are included in the proposed pricing and how charges for new or modified integrations would be determined.

11.18 Peripheral hardware & equipment

List any peripheral equipment requirements (e.g., barcode scanners, receipt printers, spine label printers) and identify any types that are incompatible with the proposed system. For each category listed below, identify the supported equipment types, any known compatibility limitations, and whether existing equipment can be used without modification. Identify any required drivers, middleware, additional software, licensing, or configuration.

If replacement or additional equipment is required, describe the applicable technical specifications and estimated costs. Identify whether compatibility differs depending on the operating system, browser, workstation configuration, or use of a web-based rather than locally installed staff client.

The Proposer shall identify any peripheral equipment that must be purchased from the Proposer or an authorized third party and any associated installation, maintenance, support, or licensing charges. All required costs shall be disclosed in the pricing proposal.

1. Barcode scanners (USB, Bluetooth, etc.)
2. Spine label printers
3. Receipt printers
4. Credit card swipes & EMV
5. Signature pads
6. Digital cameras
7. RFID equipment

For equipment identified as compatible, describe the level of support the Proposer will provide for installation, configuration, troubleshooting, and continued operation following software updates. Identify any equipment or functionality for which support is the responsibility of a third party.

12 SWAN provided services

Confirm support for the following vendors, products, and connection methods.

Table 6: SWAN core platforms

Platform	Connection method	Supported – Y/N
Aspen Discovery & LiDA, hosted by Grove for Libraries	REST API, ILS Exports	
OpenAthens	REST API	
Unique Management, including MessageBee, notice printing, and Gentle Nudge	ILS Exports	
Patron Point/Springshare LibConnect Pro	REST API	
Syndetics Unbound and covers	ILS Exports	
OCLC WorldCat Discovery	ILS Exports Z39.50	
OCLC WorldShare Interlibrary Loan	Z39.50	
OCLC Connexion	Z39.50 TCP/IP	

Third-party integrations we currently support for our libraries include:

Note: connections listed as SIP2 without TLS are local services running on the library's network

Table 7: SWAN supported vendors

Vendor/Platform	Connection method	Supported – Y/N
Auto-Graphics SHAREit (Find More Illinois)	OpenAthens, Z39.50	
Bibliotheca	SIP2	
Capira	Rest API	
Cen-Tec	SIP2	
CollectionHQ	ILS Exports	
Comics Plus	TLS-SIP2	
Communico	Rest API	
Comprise	SIP2	
D-Tech	SIP2	
Envisionware	SIP2	
Hoopla	TLS-SIP2	
Ingram	FTP	
Library Ideas	SIP2	

Library Market	TLS-SIP2	
LibraryIQ	ILS Export	
LibraryPass (Comics Plus)	SIP2	
LinkedIn Learning	SIP2	
NoveList	ILS Exports	
OrangeBoy	ILS Exports	
Overdrive and Kanopy	TLS-SIP2	
Palace Project	REST API	
Quipu (Explore More Illinois)	REST API	
Springshare (LibCal)	SIP2	
Tech-Logic	SIP2	
Tipasa	OpenAthens, Z39.50	
Wowbrary	Z39.50	

13 Appendix A: List of SWAN Member Libraries

1. Acorn Public Library District
2. Addison Public Library
3. Alsip-Merrionette Park Public Library District
4. Batavia Public Library District
5. Bedford Park Public Library District
6. Beecher Community Library District
7. Bellwood Public Library
8. Bensenville Community Public Library District
9. Bensenville School District #2
10. Berkeley Public Library
11. Berwyn Public Library
12. Bloomingdale Public Library
13. Blue Island Public Library
14. Bridgeview Public Library
15. Broadview Public Library District
16. Calumet City Public Library
17. Calumet Park Public Library
18. Carol Stream Public Library
19. Chicago Heights Public Library
20. Chicago Ridge Public Library
21. Cicero Public Library
22. Clarendon Hills Public Library
23. Crestwood Public Library District
24. Crete Public Library District
25. Dolton Public Library District
26. Downers Grove Public Library
27. Eisenhower Public Library District
28. Elmwood Park Public Library
29. Evergreen Park Public Library
30. Flossmoor Public Library
31. Forest Park Public Library
32. Frankfort Public Library District
33. Franklin Park Library District
34. Geneva Public Library District
35. Glen Ellyn Public Library
36. Glenside Public Library District

37. Glenwood-Lynwood Public Library District
38. Grande Prairie Public Library District
39. Green Hills Public Library
40. Harvey Public Library District
41. Hillside Public Library
42. Hinsdale Public Library
43. Hodgkins Public Library District
44. Homewood Public Library District
45. Indian Prairie Public Library District
46. Itasca Community Library
47. Justice Public Library District
48. Kaneville Public Library District
49. La Grange Park Public Library District
50. La Grange Public Library
51. Lansing Public Library
52. Linda Sokol Francis Brookfield Library
53. Lyons Public Library
54. Markham Public Library
55. Matteson Area Public Library District
56. Maywood Public Library District
57. McCook Public Library District
58. Melrose Park Public Library
59. Messenger Public Library of North Aurora
60. Midlothian Public Library
61. Nancy L. McConathy Public Library District
62. National University of Health Sciences
63. North Riverside Public Library District
64. Northlake Public Library District
65. Oak Brook Public Library
66. Oak Lawn Public Library
67. Oak Park Public Library
68. Palos Heights Public Library
69. Palos Park Public Library
70. Park Forest Public Library
71. Prairie Trails Public Library District
72. Richton Park Public Library District
73. River Forest Public Library
74. River Grove Public Library District

75. Riverdale Public Library District
76. Riverside Public Library
77. Roselle Public Library District
78. Saint Charles Public Library District
79. Schiller Park Public Library
80. South Holland Public Library
81. Steger-South Chicago Heights Public Library District
82. Stickney-Forest View Public Library District
83. Sugar Grove Public Library District
84. Summit Public Library District
85. The Morton Arboretum
86. The Theosophical Society in America
87. Thomas Ford Memorial Library
88. Thornton Public Library
89. Tinley Park Public Library
90. Town and Country Public Library District
91. University Park Public Library District
92. Villa Park Public Library
93. Warrenville Public Library District
94. West Chicago Public Library District
95. Westchester Public Library
96. Westmont Public Library
97. William Leonard Public Library District
98. Wood Dale Public Library District
99. Woodridge Public Library
100. Worth Public Library District