INTRODUCTION

The SCLS ILS staff developed a list of questions designed to evaluate each prospective vendors viability and ease of system administration in the 2024-25 ILS evaluation process. All vendors participating in the process submitted the reports on time. This report will summarize the reports submitted by the 3 full-service ILS providers: LibLime, Innovative Interface and SirsiDynix. The reports for the discovery layer service providers may be assessed at a later date, should that be necessary.

Overall Summary

Based on the SCLS ILS staff assessment of vendor viability reports, we have compiled the following overall summary.

SirsiDynix Symphony and Innovative Interfaces Polaris have several "vendor viability" categories in common. They are both well-established and solid companies. They both have extensive vendor partnerships and some services either come bundled with the main service, or can be bundled. We need to do more follow-up, but feel confident we will be able to work with all parties to integrate services. Both vendors have described comparable and satisfactory Customer Support and Implementation Services & Training Services. SCLS ILS staff could work with either vendor.

SCLS ILS staff do have a preference for SirsiDynix Symphony based on the following.

> Library Customers: SirsiDynix Symphony has substantially more library customers, and larger public libraries and larger public library consortia using Symphony than comparable libraries using Polaris. Large consortia are important as the software is more likely to have flexibility for consortia built in. Systems with a large number of libraries indicate that Symphony can handle large loads on the software.

> User Groups: One advantage they have is that they have special interest groups, including one for consortia. These specializations make it easier for system staff to collaborate with others in their same service areas. There is also a Wisconsin group and based on their agenda, high-level SirsiDynix staff participate.

> Development Input: SirsiDynix offers enhancement forums based on modules and customer types which are chaired by a customer moderator. One of these forums is for consortia. The SCLS ILS staff opinion is that this gives the SirsiDynix development input path an edge.

At this time, SCLS has concerns about the viability of LibLime Bibliovation. They do have one other very large consortium customer (Department of Defense Recreational Libraries), but they have not attracted many other recent customers. The LibLime user group is not operational. With fewer customers, the burden of testing most new development is not shared with partners and falls to SCLS staff. This is difficult to sustain. Integrating 3rd party vendor products has proven to be difficult and does not always lead to success.

Report

Company Information	Innovative Interfaces Incorporated / 789 E. Eisenhower Parkway Ann Arbor, MI 48108	SirsiDynix / 3300 N. Ashton Boulevard, Suite 500, Lehi, UT 84043	LibLime, a division of PTFS, Inc. / 1801 Research Blvd. Suite 310 Rockville, MD 20850
Date response submitted	November 8, 2024	November 8, 2024	November 11, 2024
RFI Responder Information	Candice Oliver / Account Manager /	Gary Voran / Sales Director, New Account Development	Patrick Jones / Director, Library Solutions & Services
Company Background	See Exhibit A	See Exhibit A	See Exhibit A
SCLS Summary	Innovative Interfaces was founded in 1978 and has a large customer base with its three library services platforms. The company is defined as a part of a global provider of data and software solutions to education, government and medical professionals, with a focus on libraries. Innovative is part of the Proquest family of companies, which joined Clarivate in 2021. *SCLS is satisfied that Innovative Interfaces is a well-established and solid company.*	SirsiDynix's origins are Sirsi, founded in 1979 and Dynix founded in 1983, and merged in 2005. SirsiDynix is a privately-held corporation, ICV Partners. *Note: after the Vendor Viability document was submitted it was announced that Harris Computing, one of six operating companies of Constellation Software, Inc, a publicly traded company based in Toronto, had acquired SirsiDynix. Harris Computing also owns Envisionware and Bibliocommons.* *SCLS is satisfied that SirsiDynix is a well-established and solid company. Its recent acquisition appears to align it more solidly in the library marketplace, and it is more comparable to Innovative.*	PTFS, parent company to LibLime, was founded in 1993. PTFS is a privately owned company incorporated in Maryland. In March, 2010 PTFS acquired LibLime which was at the time a privately owned company incorporated in Ohio. LibLime began to provide services around what is now Bibliovation in Fall, 2008. *SCLS is concerned that while LibLime did gain the business of the large Department of Defense Recreational Libraries, they have not attracted many other recent customers.*
SCLS ranking	Rank 1	Rank 1	Rank 2

Customer Information			
Customer entities: Provide the total number of customer entities with a contract for service.	264	4,700	80
Libraries: Provide the total number of libraries served.	586		550
Physical entities. Provide the total number of branches, libraries or bookmobiles.	2,990	20,000	550
Large library customers #1	**Phoenix Public Library (AZ)** 27 branches Annual circulation: 8,528,061 # of bibliographic records: 2,164,487 # of item records: 2,500,000 # of patrons: 1,000,000 Service population: 1,634,062	**Name withheld** A large county library 86 libraries, plus 34 bookmobiles, etc. # of patrons: 3.4 million 3,000 square miles	**The South Central Library System (SCLS)**
Large library customers #2	**Fairfax County Public Library (VA)** 27 branches Annual circulation: 12,881,013 # of bibliographic records: 2,460,461 # of item records: 2,300,000 # of patrons: 489,658 Service population: 1,197,235	**Name withheld** A consortium of 49 public and private colleges and universities # of item records: 20 million	**The Department of Defense Morale, Welfare, and Recreation Library Service (DoD MWR)**
Large library customers #3	**San Diego County Library (CA)** 33 branches Annual circulation: 11,515,560 # of bibliographic records: 1,472,951 # of item records: unknown # of patrons: 991,000	"The above-listed customers are by no means the only SirsiDynix customers comparable to SCLS. They are all large systems, some are larger than SCLS by some metrics and smaller than SCLS by some other metrics. But with the size of these and other	**The National Geospatial-Intelligence Agency GeoInt Research Center (NGA GRC)**

	Service population: 1,048,860	consortia comes often remarkable complexity. Our motive in pointing out a variety of library types is to demonstrate that Symphony is capable of handling large consortial demands with all types of complexities."	
Largest public library consortia #1	**Bergen County Cooperative Library (NJ)** 12 libraries with 112 branches Annual circulation: 11,800,000 # of bibliographic records: 5,100,000 # of item records: 6,500,000 # of patrons: 599,210 Service population: 1,250,000	**Name withheld** Consortia of 100 libraries # of patrons: 1.9 million # of item records: 8,000,000 Open resource sharing	
Largest public library consortia #2	**Central Library Consortium (OH)** 14 libraries with 16 branches Annual circulation: 26,000,000 # of bibliographic records: 4,771,920 # of item records: 5,073,241 # of patrons: 203,000 Service population: 1,381,559	**Name withheld** A consortium consisting of all public libraries in a state in Australia migrated from individual systems to a shared Symphony database. Now patrons at any library in the state can use their current library card to access services at their home library or any other library in the state.	
Largest public library consortia #3	**Cooperative Computer Services (IL)** 25 libraries with 30 branches Annual circulation: 13,940,134 # of bibliographic records: 5,600,000 # of item records: 5,623,610	**Name withheld** A statewide consortium that includes a State University as the largest institution, but also includes a wide variety of community colleges, and public libraries of various sizes.	

	# of patrons: 599,226 Service population: 1,097,310		
SCLS Summary	*Polaris has a satisfactory number of large customers and large consortia installations.*	*SirsiDynix requested that their customer information remain confidential. We have provided numbers, not names. SirsiDynix Symphony has substantially more library customers, and larger public libraries and larger public library consortia using Symphony than comparable libraries using Polaris. Large consortia are important as the software is more likely to have flexibility for consortia built in. Systems with a large number of libraries indicate that Symphony can handle large loads on the software.*	*Other than the Department of Defense Morale, Welfare, and Recreation Library Service, LibLime does not appear to have large installations of public libraries or consortia. This is a concern to SCLS staff.*
SCLS ranking	Rank 2	Rank 1	Rank 3
Reference 1	**Central Library Consortium (CLC)** 1685 W. First Avenue Columbus, OH 43212 Wes Osborn, Executive (details above)	**Name withheld** Consortia of 100 libraries	**SCLS -- Vicki Teal Lovely**
Reference 2	**Sharing & Technology Enhancing Local Library Access (STELLA)** 27 Mayfield Avenue Edison, NJ 08837-3820 # of Bibs: 992,854 # of Items: 3,090,624 # of Patrons: 364,501 # of Libraries: 4 # of Branches 39 Annual Circulation: 3,920,000	**Name withheld** A large county library	**DoD MWR**

	Service Population: 1,191,726		
Reference 3	**Bergen County Cooperative Library System (BCCLS)** 21-00 Route 208 South Suite 130 Fair Lawn, NJ 07410 (details above)	**Name withheld** Another county library	**Rocky View School District**
SCLS Summary	*References provided by Innovative are adequate.*	*References provided by SirsiDynix are adequate.*	*LibLime provided only 2 references.*
SCLS Ranking	Rank 1	Rank 1	Rank 2
User Groups	See Exhibit B	See Exhibit B	See Exhibit B
SCLS Summary	*Innovative offers an adequate variety of user group opportunities.*	*SirsiDynix offers an adequate variety of user group opportunities. One advantage they have is that they have special interest groups, including one for consortia. These specializations make it easier for system staff to collaborate with others in their same service areas. There is also a Wisconsin group and based on their agenda, high-level SirsiDynix staff participate.*	*The LibLime user group is not operational at this time.*
SCLS Ranking	Rank 2	Rank 1	Rank 3
Development Input	See Exhibit C	See Exhibit C	See Exhibit C
SCLS Summary	*Polaris provides adequate opportunities for customer input into its development process.*	*SirsiDynix provides adequate opportunities for customer input into its development process. SirsiDynix offers enhancement forums based on modules and customer types which are chaired by a customer moderator. One of these forums is for consortia. The SCLS ILS*	*LibLime has used an 'open development' business model for the last twelve years. This model allows customers to affect changes in the Bibliovation platform through funded design and development. SCLS confirms that this model is accurate*

		staff opinion is that this gives the SirsiDynix development input path an edge.	*and SCLS has participated in development. In the early years, there were many more similar library customers sharing in development projects and this collaboration is almost non-existent now. The burden of testing most new development is not shared with partners and falls to SCLS staff. This is difficult to sustain.*
SCLS Ranking	Rank 2	Rank 1	Rank 3
Third Party Vendor Partnerships	Most vendors SCLS currently works with are listed as partners. Missing are Talking Tech, TBS (MyPC) and Envisionware self-check systems. Syndetics Solutions is bundled with the Vega product.	SiriDynix's approach to the 3rd party vendor question was to provide lists of standards (such as SIP, Z39.5, etc.) and products that illustrate implementation of those standards. SirsiDynix offers bundled pricing for Syndetics Unbound.	No list was provided, but response stated "LibLime is happy to engage in a partnership with any service organization or company that is willing to do the same".
SCLS Summary	*The list provided is extensive. SCLS will follow up to assure that all current vendor partners are compatible. The integration of products like Syndetics is a bonus.*	*The list provided is extensive. SCLS will follow up to assure that all current vendor partners are compatible. The integration of products like Syndetics is a bonus.*	*Each time that SCLS adds a new vendor, ILS staff must work between the two vendors. This is fine if it works, but this does not always lead to success—for example, we have not been able to integrate OverDrive with Bibliovation.*
SCLS Ranking	Rank 1	Rank 1	Rank 2
Customer Support	Agile ticket response, based on severity. Tickets submitted	Help Desk support (call, email, chat). 24/7 emergency support.	Online ticket center. Response is based on priorities of 1-3.

	through a support center. Access Polaris Site Manager.	Access to Library Relations Manager.	Priority 1 response available 24X7X365. Weekly customer support meeting (per contract).
SCLS Summary	*SCLS is satisfied with the customer support as described by Innovative.*	*SCLS is satisfied with the customer support as described by SirsiDynix.*	*SCLS has found the customer support system with LibLime to be adequate.*
Implementation Services & Training Services	Migration and implementation: 5 services areas. A 5 phase plan is laid out.	Migration and implementation: 4 areas of focus, each with a team. Phased plan developed, led by a project manager. A detailed sample implementation and training plan is provided.	Description was provided, but would not be applicable.
SCLS Summary	*SCLS is satisfied with plan as presented.*	*SCLS is satisfied with plan as presented.*	*A migration is not applicable if the decision is to remain on Bibliovation. However, LibLime does have an excellent migration service.*
Additional notes		Some information SD provided is confidential.	

Exhibit A: Company Background

Provide a background on the history of the company, including when it started, mergers, name changes etc. Include if this company is a subsidiary company, publicly traded, privately owned, non-profit, etc.

#1 Innovative Interfaces Incorporated

Innovative Interfaces Incorporated was founded in 1978 for the sole purpose of serving public libraries. Our first software was an interface to make cataloging easier for library staff by allowing the download of bibliographic records into a third-party circulation system without re-keying – at the time a revolutionary, time-saving service for librarians. Since 1978, we have routinely introduced new technology to help librarians and patrons and to expand libraries' impact on the world.
Innovative has focused on helping libraries throughout our history, introducing a series of new solutions to help our customers. Innovative launched the first truly integrated library system in the 1980s, which included a public access catalog (PAC), as well as cataloging, circulation, serials, and acquisitions modules. The 1990s saw exciting changes for Innovative. The first INN-Reach system was launched, dramatically increasing the speed and cost-effectiveness of resource sharing. Over the next 10 years,

Innovative continued to expand the system with Web Services technology and integrated tools such as Ecommerce. By integrating functions that surpassed expectations of the traditional ILS, Innovative kept libraries up to date as they expanded services to become more efficient and provide in-demand web-based services. Since our earliest days, Innovative has continually strived to provide excellent customer service. Today, the Customer Support Center offers web-based call initiation, reporting, and a wealth of information, training, and product tutorials.

Through our ongoing focus on delivering leading software solutions to the global library community, our company has evolved from a privately owned corporation to a part of a global provider of data and software solutions to education, government and medical professionals. Throughout this process, Innovative has maintained its identity and its focus on libraries. In 2014, Innovative acquired Polaris Library Systems and VTLS, bringing together three of the leading providers of library services platforms to the library community. The combined company offers even greater resources to Innovative customers in solving the challenges of library automation, deepening customer support and product development capabilities worldwide. In 2020, Innovative joined the ProQuest family of companies. As a ProQuest business unit, Innovative continued in its role as a cutting-edge company, but with additional financial resources to invest in products, people, and a proven commitment to serving libraries' changing needs. ProQuest is exclusively focused on the library marketplace and partners with content holders of all types, preserving and enabling access to their rich and varied information. ProQuest has brought financial commitment to help us enhance our current products and develop new ones.
On December 1, 2021, the ProQuest family of companies joined Clarivate to empower global discovery, research and innovation. Clarivate is a global leader in providing trusted information and insights to accelerate the pace of innovation. The combination of Clarivate and ProQuest creates a world-leading software and information provider for research-focused organizations to fuel scientific discovery, knowledge sharing and accelerate innovation into the future.

Today, Innovative, part of Clarivate, supports over 2,400 library systems and over 10,000 libraries in 66 countries. Innovative has a global presence – serving thousands of libraries worldwide.

#2 SirsiDynix

Our company has 40+ years of experience in library automation. Sirsi Corporation was founded in 1979 as a computer consulting business. The company developed a Unix-based library automation system for the Georgia Institute of Technology in 1981 and offered it as a turnkey system to other libraries beginning in 1983. Also in 1983, Dynix Corporation first partnered with libraries to spearhead the development of Integrated Library Systems (ILS) technology. Their strengths were combined when Sirsi Corporation and Dynix merged in 2005, forming SirsiDynix. SirsiDynix was acquired by Vista Equity Partners in December of 2006 and was then acquired by ICV Partners, a leading investment firm, in December of 2014. SirsiDynix is a privately-held corporation.

SirsiDynix maintains numerous offices in the United States and around the world, including our corporate headquarters in Lehi, Utah, and offices in 18 countries including Canada, Australia, throughout Europe, Asia, and Central and South America. This global reach provides you with a dedicated team that can support your needs 24/7. Our team of industry experts, many with library and MLS experience, includes nearly 300 full-time individuals devoted exclusively to our electronic library systems. Department Total SirsiDynix Headcount

Training & Consulting 22
Data & Delivery Services 15
Project Management 9
Upgrades 5
Customer Support 49
Library Relations 10
R&D/Development 76
Cloud Services/SaaS 12
Marketing 6
Sales 48
HR 3
Admin/Legal 7
Accounting & Finance 21
IT 4
Total Number of Employees 287

With over 40 years of industry experience, we know how to deliver outstanding solutions and on-time implementations to academic, public, school and consortia libraries, helping you to deliver a great patron experience while increasing productivity and lowering costs.

#3 LibLime

LibLime is the Library Software & Services Division within Progressive Technology Federal Systems, Inc (PTFS) that is responsible for ILS/LSP/CRM implementation, consulting, development, and support/hosting services. LibLime currently is under contract to provide support to over 550 research centers and libraries using numerous software services and systems. PTFS is a privately owned company incorporated in Maryland.

PTFS and LibLime have sold and implemented hundreds of commercial Integrated Library Systems (ILS) and Library Service Platforms (LSP) to libraries since 1995. Since 2008, we have focused our efforts around the Bibliovation LSP. In March, 2010 PTFS acquired LibLime which was at the time a privately owned company incorporated in Ohio.

We began to provide services around what is now Bibliovation in Fall, 2008. Our first installed customer was a small Maine public library in January, 2009. We have been expanding our customer base and enhancing the software ever since. In the last five years, we have averaged roughly 2.5 production upgrades annually. Over the last three years we have added over 30 new libraries as customers to our platform. Our most recent customer is the combined group of the Department of Defense Recreational Libraries covering all four service branches. We began building a single shared union catalog for them, starting with 30+ Navy libraries, in December, 2020 and completed that massive project in July, 2024. There are now over two hundred brick and mortar service organizations throughout the world sharing this hosted union catalog of community resources.

Exhibit B: User Groups

Please describe the makeup and role of ILS and/or Discovery Layer user groups. Include the governance structure, whether the user group is user managed or company managed, total membership (break out customer entities and libraries if applicable), and membership fees. SCLS is interested in the number and

types of opportunities for user group and/or customer gatherings, including at major conferences and user group conferences. Include also any regional user groups.

#1 Innovative Interfaces Incorporated

Innovative customers are a part of the Innovative Users Group (IUG), one of the most active user groups in the industry. The IUG was founded in 1991 as an international organization of member libraries who use the Innovative Interfaces Incorporated integrated library software. It is an independent organization from Innovative Interfaces.

Online Clearinghouse

This database-driven resource allows greater searching capabilities than a clearinghouse made up of static webpages. IUG members have a centralized resource for sharing public and staff tutorials, locally produced manuals, presentations, and locally written scripting applications for Innovative software. This site is located at https://forum.innovativeusers.org/c/clearinghouse-repository/11.

Annual Conference

The Innovative Users Group coordinated the first annual Users Group Conference in 1993.
Each year, Innovative users present dozens of sessions on creative and effective use of Innovative's products and services, providing the opportunity for users to share among themselves and with the Innovative staff the various ways in which the system is being implemented in public libraries.
In addition to the myriad of presentations, Innovative's staff discusses the company's plans for future system enhancements, gives presentations on product "tips and tricks," and meets with users to learn about their needs and future expectations.

IUG Forum

The IUG Forum is not operated by Innovative and stays independent. Topics discussed by over 2,000 subscribers to the discussion list focus on implementation issues, hardware platforms, telecommunications, suggestions for new enhancements, library staff functions, announcing local projects, posting notices of upcoming users group meetings, etc.

Idea Exchange

Innovative uses Idea Exchange, a product development community where customers can share feedback and ideas that inform the development of our solutions. Rather than contracting for custom development for your individual needs, this process lets you brainstorm with other Polaris libraries to collectively devise better solutions.

Idea Exchange is accessible from the Innovative Users Group (IUG) webpage as well as the Customer Support Center. Idea Exchange is a community innovation environment, designed for users to submit, discuss, and vote on ideas to improve solutions for libraries.

#2 SirsiDynix

There is the SWIG (Wisconsin) group and they typically meet both in person and online. This meeting often takes place around August. Here's a review of this past conference:

SWIG 2024: Forging Connections, Finding Inspiration

At this special in-person and online event, you'll hear firsthand about SirsiDynix product updates, watch fellow regional librarians collaborate, and discover innovative ways peers are using and adapting their software to their needs.

Other session topics will include:

- BLUEcloud Analytics Sharing Session
- SirsiDynix Product Roadmap
- Round Table Discussion

Agenda

9:00 AM	Introductions and What to Expect for Today	Lori Burgess
9:05 AM	SirsiDynix Product Roadmap	Berit Nelson
9:50 AM	BLUEcloud Mobile2 Overview	Melissa Kulmer
10:20 AM	BLUEcloud Discovery Overview	Adam Viator
10:40 AM	**Break**	
10:55 AM	BLUEcloud Circulation and Cataloging Updates	Carla Clark & Lisa Witteman
11:15 AM	BLUEcloud Analytics Overview	Hilary Prisbylla
11:45 AM	BLUEcloud Analytics Sharing Session	Open Discussion
12:15 PM	Open Forum and SirsiDynix Q&A	Open Discussion
12:30 PM	**Lunch Break**	
1:15 PM	Round Table Discussion of User-Based Topics	Open Discussion
3:00 PM	Closing Remarks	Lori Burgess

SirsiDynix partners with user groups around the world in an effort to better interact and communicate with, as well as support, the users of our products and services. International user conferences, regional user group meetings, online communication forums, and product enhancements interaction mechanisms are a few of the ongoing initiatives that SirsiDynix and its user groups work together to maintain and expand for their mutual benefit.

SirsiDynix relies on input from several independent users groups to monitor overall customer satisfaction and to solicit customer ideas and priorities for new development and product enhancements. Users Groups facilitate cooperation and information exchange between users of various SirsiDynix systems and serve as a united voice for the exchange of information and development ideas between SirsiDynix product users and SirsiDynix.

In addition, all of our customers are provided with access to our customer web forum to open or pursue discussion on any desired topic. Aside from SirsiDynix gleaning new development ideas from the forum, customers share shortcuts, hints, tips, suggestions, etc. The forum is virtually available to empower our customers as teams members of SirsiDynix to help shape our corporation as we strive to become customer-centric, focused on the simple reality behind any company: understanding and pleasing our library customer. It is your participation in how the ILS best can be utilized today as well as developed in the future.

User Groups
SirsiDynix member libraries may join our large users group (COSUGI) as well as Special Interest users groups (SIGs).

The SIGs are: Academic Libraries, Special Libraries, State Library, Consortia, Public Libraries, K-12 Libraries, Large Users Group, Corporate, Federal and Scientific/Technical Libraries, Medical Library, and Law Library. The official COSUGI website is http://www.cosugi.org. The activities of COSUGI are coordinated by an Executive Committee elected by the membership. The website was created by COSUGI and serves as the means for COSUGI members to remain current about COSUGI activities and conferences. Dues/annual fee information for user groups are available at:

COSUGI – Customers of SirsiDynix Users' Group Inc.
www.COSUGI.org
COSUGI's purpose is to facilitate communication among its members, and between the membership and SirsiDynix; to collaborate with our international counterparts and SirsiDynix on recommendations for product development and enhancements; and to support the activities of Special Interest Groups and Regional Users Groups. Numerous other user groups exist for specific countries and geographic areas.

SirsiDynix Connections Annual Conference
Connections is a free, online conference open to library professionals worldwide—and everyone in your library is invited to attend.
Free - Open to all libraries and their staff at no cost

Focused - Expert-led, strategy-driven educational programming

Fast-Paced - Interactive, 15- to 30-minute sessions

SirsiDynix Connections is held annually and brings together 1,000+ attendees from across the globe to hone product knowledge, learn from distinguished thought leaders, and discover exciting ways to advance your library's mission.

The most recent Connection conference offered 40+ sessions over three days dedicated to the latest industry trends, new educational resources, and a dynamic array of library-centered products and services. Presented over three days, attendees were able to hear from a range of experts on current trends and issues—including artificial intelligence, the culture of reading, and data voids—and glean valuable insights about how to navigate them.
SirsiDynix management also discussed the ins and outs of our new investment initiative, and how it will enhance product functionality, accelerate release timelines, and elevate the staff and patron user experience.
The conference format gives the flexibility to zero in on the content that matters most to you by following one of three tracks: Partner Connect, Explore SirsiDynix, or Academic.

#3 LibLime

As the creator of the software product LibLime attempts to maintain neutrality regarding customer organization and product requests. As such, LibLime does not organize a User's Group. Over the years, LibLime customers have organically organized User's Groups and asked for LibLime corporate support and participation. LibLime participates and supports in any way possible other than being a controlling entity for users. The last User's Group ceased to exist as covid became prevalent. Our DoD MWR customer is now considering organizing a new User's Group once they are given permission by the DoD to participate with non-DoD organization

Exhibit C: Development Input

Describe the process for customer input into the development process. Is the user group involved? Is there the opportunity for customer funded development? How are known bugs prioritized for resolution?

#1 Innovative Interfaces Incorporated

Our customers drive changes to our products. At Innovative, we are truly invested in creating the best possible experiences for your patrons, your staff and your entire community. This is why our vision and development efforts are rooted in meeting your needs and understanding the outcomes you hope to achieve. This process allows us to deliver products that continually adapt to how patrons and staff use them, driving better outcomes for your library.

Innovative engages with current customers in different ways throughout the development process to ensure changes to the product are influenced by libraries' needs.
Idea Exchange – The Idea Exchange is an open collaboration platform where Innovative users can suggest enhancements to our products and other users can upvote those ideas. Innovative regularly adds enhancements from Idea Exchange to our releases, and over 100 customer-suggested enhancements have been added to our releases since 2018.
Member-Exclusive Enhancements Process (MEEP) – Innovative has signed an agreement with the Innovative Users Group with a commitment to implementing enhancements from MEEP process as voted on by designated IUG Working Groups.
Product Roadmap – Our public roadmaps allow customers to rate the importance of new features. Once an idea has transitioned to the roadmap, this allows us to prioritize critical features in our sprint planning process for software engineering.
Product-led Meetings - In 2023, the product management team spent over 2,000 hours with libraries listening to their feedback. While we can't meet with every customer, we do routinely meet with customers and ask them to beta test a feature or provide user testing on features about to be released.
In addition to our development process, we provide customers with open portals for documentation and support, conduct customer webinars and maintain public roadmaps to keep customers current on the latest developments in our software solutions, and assign a dedicated site manager who provides a familiar point of contact for your questions and support issues. In addition, our large and active user community engages in collaboration through the customer-led Innovative Users Group.
Customer-driven enhancements are important to us, we understand that what works for one library may not work for our more than 600 Polaris library systems. This is why our engineering team takes the time, resources, and budget to ensure that new features, especially ones that impact your workflows, have staff settings so that libraries can choose to enable or disable the features.

#2 SirsiDynix

SirsiDynix relies on input from several independent users groups to monitor overall customer satisfaction and to solicit customer ideas and priorities for new development and product enhancements. User's Groups facilitate cooperation and information exchange between users of various SirsiDynix systems and serve as a united voice for the exchange of information and development ideas between SirsiDynix product users and SirsiDynix.

Customer enhancement forums based on modules and customer types exist on the SirsiDynix Client Care portal. Each enhancement forum is chaired by a customer moderator who formulates enhancement discussions into formal enhancement suggestions that are voted upon by the customers. A designated

number of the top voted enhancement suggestions are sent to SirsiDynix for review prior to SirsiDynix roadmap planning. SirsiDynix considers these suggestions closely in our roadmap process and updates the forums with the enhancements that have been selected for a given release cycle.

SirsiDynix divides the enhancement process up into functional categories and attempts to select 1 or 2 enhancement requests from each category for the annual roadmap. Consortia have their own category. This means that consortia can vote on enhancement requests within each of the modules and can also vote on consortia-specific requests.

The way that individual sites vote and how votes count is up to the User Group, which also makes the decisions on how voting works. This is a joint decision made by the user group board.

In order to ensure that customers using all of our key platforms have a voice in the enhancement process, enhancement forums are available for both ILS platforms and also for all non-ILS products.

Enhancements are developed throughout the year based on an overall development plan organized around each year's major release. Enhancements are made available without further charge to all customers maintaining an annually renewable software support contract with SirsiDynix.

In addition to the customer enhancement forums, enhancements are considered and developed based on:

- **SirsiDynix Strategic Partner Program**, which involves customers directly in the SirsiDynix development process via review of product requirements, development in progress, and participation in pre-beta Community Technology Previews
- **Changes necessary to maintain compliance** with evolving standards and protocols or take advantage of new ones, e.g., changes to existing standards such as MARC and Z39.50 are Incorporation of new standards not yet in general use, e.g., emerging interlibrary loan standards, is normally scheduled to keep pace with final approval by the appropriate standards committees, and the availability of practical applications for the standards.
- **Developments based on new technology**, as exemplified by our leadership in releasing clients that take advantage of the World Wide Web and the capabilities of new generations of PC workstations.
- **Developments suggested by potential clients**, often in the form of RFP specifications, which are regularly reviewed to ensure that all ILS modules and clients deliver the features in which libraries are interested and remain competitive across the board

We are proud of our responsiveness to our customers and welcome their input in the development process. We encourage customers to submit ideas for development. This process results in numerous customer-suggested enhancements added to releases.

#3 LibLime

LibLime has used an 'open development' business model for the last twelve years. This model allows customers to affect changes in the Bibliovation platform through funded design and development. This model allows our customers to play a substantial role in the evolution of the Bibliovation platform, if they are so inclined. Some customers take advantage of this and have designed workflows that meet their specific needs in circulation, acquisitions, and cataloging. Other customers are either not technically capable of taking on this role, or else they are just not funded to do so. Regardless of where the idea comes from, who develops the design, or who funds the enhancements, all customers benefit from the new development built into the Bibliovation platform.

When a LibLime customer is interested in participating in the open development process, they contact LibLime and discuss their enhancement ideas. LibLime application experts and software engineers then work with the customer to accurately describe how to meet the customer's objectives and their desired results for system enhancement. A design is generated for software expansion to support the desired result. LibLime engineers then provide a level of effort based on the design, and the customer is sent a development quote with a descriptive statement of work covering the development approach. If the customer is interested in purchasing the enhancement, the quote is turned into a task order and the development work is scheduled by LibLime. The customer then participates in testing the new functionality once it is ready to be placed in the customer sandbox for initial review and response. The development process is iterative and LibLime works with the customer until the enhancement is functioning as designed and the expected outcome is occurring. The new functionality is then committed to the base codeline and is delivered to all customers via the version upgrade process.

For over a dozen years now LibLime has been expanding the Bibliovation platform based on individual customer development requests and development request whereby multiple customer join together to create the request.

Currently LibLime is in beta testing for a new AI Module (called SmartSearch) which will be published as a production release in the first quarter of 2025.