

**Report title: CUSTOMER AND STOCK DATABASE SYSTEM RENEWAL
(LIBRARY MANAGEMENT SYSTEM)**

Wards affected: All

Strategic Director: Alison Comley

Report Author: Kate Murray

RECOMMENDATION for the Mayor's approval:

- To agree the procurement, through Somerset County Council as LibrariesWest consortium lead, for a new library management system from 2015/6 for 7 years and the option to extend for a further 2 years.
- To authorise the Strategic Director Neighbourhoods to proceed as planned, through to and including giving authority for Somerset County Council, as lead authority, to enter into a contract with the preferred bidder on behalf of the partner authorities.

Key background / detail:

a. Purpose of report: The current LibrariesWest Library Management System (LMS) contract will expire in May 2016 so LibrariesWest consortium (7 local authorities) has gone through an OJEU process to retender as all options to extend have already been taken.

New suppliers have entered the market and the system options available have increased which would allow the consortium to reduce costs and improve efficiencies. Also two more Local Authorities have joined the procurement process increasing efficiency in the procurement process.

b. Key details:

1. The LMS is the business critical ICT system providing the core functionality of the library service across the five (and potentially 7) partner authorities in the LibrariesWest consortium. The LMS facilitates buying material for all 28 Bristol City libraries and being able to borrow and return items, use the online catalogue and customer account management. It provides the support services for the self-service kiosks, online Reference Resources, and the free public access computers.
2. Somerset County Council as the lead authority will procure the system on behalf on the partner authorities, including the letting and management of the contract. By doing this LibrariesWest is able to realise significant cost savings in running costs over the lifetime of the contract as well as providing a better service to customers. These cost savings will be shared by the partner authorities, of which Bristol is one.

3. The value of the LibrariesWest total contract for the LMS, for 5-7 authorities could be an estimate of £1.25 Million over the contract length of 9 years, depending on the supplier chosen and the award of the contract across 7 authorities. The value of the contract for Bristol could be £220,000 for the LMS alone over 9 years, from the revenue budget, as part of a 7 authority consortium. This would be a saving. There is potential for further reductions to ongoing LibrariesWest costs if the consortium grows to include 7 authorities. Bristol costs are currently 26% (current 5 authority proportion) and may decrease to 20% of the total consortium.
4. Recognising that Bristol Libraries will undergo significant change, as will the other library authorities, over the life of the contract, the new library management system will be required to be flexible and adaptive to other models of delivery e.g. community libraries, working with volunteers and an increased digital offer.
5. The project was approved through the Change Board in 2014 to release the appropriate support through ICT.

**BRISTOL CITY COUNCIL
CABINET
JUNE 2nd 2015**

**REPORT TITLE: CUSTOMER AND STOCK DATABASE SYSTEM RENEWAL
(LIBRARY MANAGEMENT SYSTEM)**

Ward(s) affected by this report: All

Strategic Director: Alison Comley / Strategic Director Neighbourhoods

Report author: Kate Murray / Head of Libraries

**Contact telephone no. 0117 352 1264
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Purpose of the report:

The current LibrariesWest Library Management System (LMS) contract will expire in May 2016 so Bristol Libraries as part of LibrariesWest, is required to go out to tender as all options to extend the contract have already been taken.

The market has changed significantly since the current contract was let. New suppliers have entered the market and the system options available have increased which would allow the Consortium to reduce costs, improve efficiencies and offer a better customer service online.

Additional authorities have joined the procurement process which could lead to the expansion of the LibrariesWest Consortium and potential further cost savings for all authorities.

The library management system is the underpinning technology that will help the Libraries for the Future programme meet the core and local offers throughout the city, as one essential part of the future development of the library service.

RECOMMENDATION for the Mayor's approval:

- 1. To agree the procurement, through Somerset County Council as LibrariesWest consortium lead, for a new library management system from 2015/6 for 7 years and the option to extend for a further 2 years.**
- 2. To authorise the Strategic Director Neighbourhoods to proceed as planned, through to and including giving authority for Somerset County Council, as**

lead authority, to enter into a contract with the preferred bidder on behalf of the partner authorities.

The proposal:

LibrariesWest

1. The LibrariesWest Consortium consists of library authorities from Bristol, Bath and North East Somerset, North Somerset, Somerset (Lead Authority) and South Gloucestershire. The authorities of Dorset and Poole are joining the consortium for the procurement exercise and both have indicated they will join the consortium. This will reduce costs for all.
2. We are the oldest and most mature of all consortiums nationally and held up as an example of good practice. Consortium working fosters close collaboration, sharing of skills and knowledge, customer benefits and cost benefits to the authorities.
3. BCC joined LibrariesWest in 2006, following a joint LMS tendering process. This provided Bristol with a lower cost Library Management System and improved customer service, to enable borrowing throughout five authorities with one single library card. The increased customer offer was a huge benefit to our residents.
4. We share a library management system (LMS) which enables our customers to access and return books and stock across 5 and soon 6/7 authorities. We would never be able to replicate access to this many books as a single authority. Our residents enjoy a stock of over 2.5 million items through 96 + libraries, returnable to any one of those libraries. This means that a single library card can be used through a considerable geographical area.
5. We all contribute to the shared eBooks and e Audio catalogue as it can be accessed equally through the LibrariesWest website. This offers our residents a far bigger range of titles than a single authority could. Our only limiting factor is the current range of titles available from publishers.
6. LibrariesWest employ 3 members of ICT staff to develop the website, run management reports, fault manage and liaise with our suppliers and Library Management System suppliers. There are efficiency savings on joint procurement and development. The costs are shared according to population. There are also efficiency savings in the joint management of acquiring and processing books and library materials. Somerset Bibliographic Services do this already for four authorities. Bristol has recently joined this arrangement and made efficiency savings contributing to the corporate restructure.
7. We plan and deliver joint training, marketing initiatives, share in joint bids and share best practice.
8. There is a Service Level Agreement in place to manage the LibrariesWest governance with an 18 month termination period to withdraw from LibrariesWest.

Libraries For The Future

9. The ongoing comprehensive review of the Bristol library service – Libraries for the Future, is dependent on the continuation of an effective Library Management System.
10. The future library service requires a modern technological solution for working with local authority libraries, communities and self-service technology. The current LMS is not capable of this future development.
11. The customer expects a comparable experience to other online services. This would be part of the Bristol Libraries core offer.
12. A new library management system needs to be flexible and able to adapt to future changes within any of the consortium members.

Library Management System (LMS)

13. The Library Management System (LMS) is the technical tool for delivering the library service in Bristol across 28 libraries. It is business critical as it is the way for issuing and returning library items. It is a huge database of books and library materials for all 5 (currently) authorities that can be searched online and also has an accompanying borrower database with all our customer details. It provides the platform for our website and e Books and e Audio. It provides the support services for the self-service kiosks, online Reference Resources, and the free public access computers.
14. The contract for the current LibrariesWest Library Management System (LMS) will expire in May 2016 and all options to extend have already been taken. The value of the contract means that LibrariesWest has gone out to tender for a replacement system which will need to be in place by May 2016
15. We are currently in a full OJEU (Official Journal of the European Communities) process as LibrariesWest to replace the traditional and limited system. The current system has been in place since 2006 and is not fit for future service. Each change requires a long lead in and substantial additional cost. It does not provide the future developments we require as standard for a new approach to library services in Bristol.
16. The OJEU system offers the widest range of responses and we have been very detailed in our requirements of a new system – from being accessible to sharing data across the local authority to responding to the inevitable changes to library services across all 5-7 authorities. These changes may be from an increased digital service to a local response for one authority to community libraries and less local authority supported Libraries. We are hoping for a much better digital offer for our customers that are used to Amazon style online shopping with recommendations and reading profiles. We will require a fully adaptable Library App that can be scaled to all mobile devices and a platform for further developments. This procurement will allow us to test the current market and ensure that the Consortium is getting best value for the available financial resource.
17. The new system and contract will have to be responsive to change over the length of the contract, to ensure that future changes can be managed across all authorities.

18. The contract length is for 7 years with a 5 year break clause and the option to extend for a further 2 (therefore a maximum of 9 years).
19. Somerset County Council as the lead authority will procure the system on behalf on the partner authorities, including the letting and management of the contract. By doing this LibrariesWest is able to realise significant cost savings in running costs over the lifetime of the contract as well as providing a better service to customers. These cost savings will be shared by the partner authorities, of which Bristol is one.
20. The value of the LibrariesWest total contract, for 5-7 authorities could be an estimate of £1.25 Million over the contract length of 9 years, depending on the supplier chosen and the award of the contract across 7 authorities.
21. The value of the contract for Bristol could be £220,000 for the LMS alone over 9 years, from the revenue budget, as part of a 7 authority consortium. This would be a saving. The value of the current contract for Bristol is £31,000 a year, £279,000 over 9 years
22. There is potential for further reductions to ongoing LibrariesWest costs if the consortium grows to include 7 authorities. Bristol costs are currently 26% (current 5 authority proportion) and may decrease to 20% of the total consortium costs.
23. Bristol Libraries currently pay approximately £100,000 - £125,000 per year for all the services that LibrariesWest currently provide for us. These services include the LMS contract, Bibliographic services to process books and library items, e-book service and the joint administration of the LMS.
24. All LibrariesWest partners are using a Collaboration Agreement through the procurement. This has a one month termination period.
25. If the proposed decision is not implemented Bristol Libraries would no longer be able to run a library service as now or in the future, as the Library Management System is business critical to provide the technical platform for library service delivery.

Consultation and scrutiny input:

a. Internal consultation:

BCC Procurement – as Somerset County Council were the lead authority and undertaking the procurement exercise, BCC procurement were satisfied with a watching brief.

BCC Legal - worked on the Collaboration Agreement between all authorities for the procurement process and the issue of the OJEU notice and Invitation to Tender documents.

BCC ICT for implementation - Approval by the Change Board on 29th April 2014. Resources allocated by ICT for implementation.

Library Staff – to assess operational requirements of any future Library Management System

b. External consultation:

LibrariesWest Consortium partners – to scope the brief and formal documentation of the OJEU process.

Other authorities within the South West – to investigate interest in a shared procurement and tender process.

Scrutiny was not deemed necessary as the new contract was regarded as Business as Usual and without a Library Management System the library service could not function.

Other options considered:

1. Do Nothing – the existing contract expires on May 2016 and there is a risk of service failure for this option. The procurement is lengthy for 7 authorities to agree process. A single authority procurement is prohibitively costly and risks a poorer customer offer at substantially increased revenue.
2. Extending the existing contract – rejected as LibrariesWest Consortium had already taken the option to extend for a single period of up to 5 years by extending for the maximum period.
3. Renegotiating a new contract with existing supplier – rejected as the current contract has been extended for the maximum period. In addition, the market has changed significantly since the current contract was let and the LibrariesWest Consortium needed to test the current market to ensure that best value for the available financial resource was obtained.
4. Renegotiating a new contract as a single authority – rejected as the OJEU process has started with Bristol as a partner.
5. To withdraw from the LibrariesWest Consortium – rejected as the cost is so prohibitive (both for the procurement and continued standalone service) and Bristol Libraries do not have the resources to replicate the services provided as a consortium. Equally the customer offer would be much worse.
6. To withdraw from LibrariesWest and do a separate procurement – rejected due to the increased cost of procurement, decreasing timescales to achieve a satisfactory LMS solution and the much poorer customer offer.

Risk management / assessment:

FIGURE 1

The risks associated with the implementation of the Customer and Stock Database System Renewal decision :

No.	RISK Threat to achievement of the key objectives of the report	INHERENT RISK		RISK CONTROL MEASURES Mitigation (ie controls) and Evaluation (ie effectiveness of mitigation).	CURRENT RISK		RISK OWNER
		(Before controls)			(After controls)		
		Impact	Probability		Impact	Probability	
1	Temporary disruption to customer service whilst the new system is configured	High	Low	The LibrariesWest team have added sufficient contingency time to the procurement tender to allow for gradual transition that will not impact on the customer	Low	Low	Kate Murray
2	ICT support to implement the new system	High	Medium	The request for ICT support has been approved by the Change Board	Medium	Low	Kate Murray
3	Risk of delay in the procurement working with 6 other authorities	High	Low	The procurement is led by Somerset CC and all authorities are bound by a collaboration agreement for the process that mitigates against this risk.	Low	Low	Kate Murray

FIGURE 2

The risks associated with not implementing the Customer and Stock Database System Renewal decision:

No.	RISK Threat to achievement of the key objectives of the report	INHERENT RISK		RISK CONTROL MEASURES Mitigation (ie controls) and Evaluation (ie effectiveness of mitigation).	CURRENT RISK		RISK OWNER
		(Before controls)			(After controls)		
		Impact	Probability		Impact	Probability	
1	LibrariesWest consortium contract fails if Bristol do not implement this decision	Medium	High	Timely cabinet report and advice sought from Legal and Procurement about the process	Medium	Low	Kate Murray
2	Bristol Library service fails if there is no procurement process	High	High	Approval from the Change Board to proceed to Cabinet. Timely cabinet report.	Medium	Low	Kate Murray

Public sector equality duties:

A full Equality Impact Assessment has been undertaken for this project and is attached as Appendix 1.

The main equality impact for this project is access to the new system. To ensure that the new LMS system does not disadvantage customers with protected characteristics the specification will be compatible with assistive technology users and will be tested before it goes live to ensure there is no loss of service to Disabled customers. The system will enable font size to be changed so that users with a visual impairment can access the site. The new LMS will offer a number of benefits for customers from equality groups, including access to a wider range of books including books in languages other than English and an interface that is easier to use with mobile technology which may be particularly useful for some Disabled people and younger people.

The new system is not intended to replace counter service for those that prefer it and customers will still be able to access the library catalogue via staff assistance.

The staff user interface will also be compatible with assistive technology. Library staff who use assistive technology will be identified and the system will be tested with them before it

goes live. All staff will be provided with support and guidance to enable them to make full use of the new LMS to carry out their job effectively. Particular attention will be paid to the needs of older staff members who may be less comfortable with new technology as part of training during the implementation process.

The Bristol City Council Equality Impact Assessment can be found as Appendix 1.

As part of the tender evaluation process LibrariesWest Consortium will assess the systems on offer to ensure they meet accessibility standards and comply with Data Protection and Freedom of Information legislation

Eco impact assessment

Libraries West Consortium are undertaking & documenting a Sustainable Procurement Review in compliance with the Public Services (Social Value) Act 2012.

The retender of the Libraries West Consortium Library Management System contract will not produce any further significant environmental impacts than those arising from current arrangements.

Advice given and Assessed by Claire Craner-Buckley Environment Project Manager, Environmental Performance Team, Energy Service (formerly Sustainable City Group)

Date 08/04/2015

Resource and legal implications:

Finance

a. Financial (revenue) implications:

Library Services is expecting to reduce its on-going revenue costs from May 2016 through implementing a new Library Management System which is due to be procured by the LibrariesWest Consortium.

The existing current revenue budget, already within the library budget for the LibrariesWest Consortium (which includes LMS) is approx. £100,000 of which £31,000 is understood to relate to the Library Management System. It is not possible to specify the extent of revenue savings until the procurement process is finished and the contract awarded.

Library Services have advised that the one – off implementation charge of an estimated £10,000 which can be funded from within the existing Bristol Libraries budget.

Advice given by Robin Poole, Finance Business Partner, Neighbourhoods

Date 15th April 2015

b. Financial (capital) implications:

There are no capital implications.

Advice given by **Insert name / job title**
Date **Insert date**

c. Legal implications:

The procurement process commenced prior to 26 February (the date when new 2015 procurement Regulations came into force) and accordingly has and will comply with the procedures set out in the Public Contracts Regulations 2006. Legal Services have been involved in the procurement process and in the preparation of the contract documents.”

Advice given by Eric Andrews, Team Leader, Legal Services
Date 1st April 2015

d. Land / property implications:

We are not aware of any property implications associated with this procurement exercise.

Advice given by Steve Mathews Project Lead Corporate Property
Date 1st April 2015

e. Human resources implications:

This Consortium contract enables libraries to retain self-service facilities for the citizens of Bristol, which directly impacts on the number of staff required to run library services. Staff may require training to use the new system. There are no further HR implications associated with this procurement exercise. Not having a suitable ICT system to support library services would result in a requirement to review resources with likelihood of additional resources being required to deliver any alternative model.

Advice given by Sandra Farquharson/People Business Partner, Neighbourhoods
Date 15/04/15

f. ICT implications:

ICT would require that:

- The front-end user interface design meets the standards of usability and accessibility we have set for all of our digital services
- We examine ways in which we can integrate both the customer data and account credentials with our citizen account, or how well we can integrate the user experience into our website and digital services.
- Where the system supplier(s) operate a hosted solution, this will be our preferred choice.

These should be possible to test during the tender and selection process.

Advice given by
Date

Ian Gale
08/04/2015

Appendices:

Appendix 1 – Equality Impact Assessment

Bristol City Council Equality Impact Assessment Form

(Please refer to the Equality Impact Assessment guidance when completing this form)



Name of proposal	Libraries West Library Management System – re tender project 2015
Directorate and Service Area	Neighbourhoods
Name of Lead Officer	Kate Murray

Step 1: What is the proposal?

Please explain your proposal in Plain English, avoiding acronyms and jargon. This section should explain how the proposal will impact service users, staff and/or the wider community.

1.1 What is the proposal?

Libraries West is undertaking a procurement project to replace the existing Library Management System (LMS), in a joint procurement exercise with Dorset County Council and Poole Borough Council. The purpose of this document is to assess any impacts the project might have on equalities issues. The LMS is the business critical technological system providing the core functionality of the library service.

This integrated system provides a comprehensive package that covers the following elements:

- Circulation – controls all aspects of the circulation of library stock between libraries and customers.
- Acquisitions – controls the processes around the purchase of library materials
- Cataloguing – controls the management of library catalogue records
- Inter Library Loans – the inter lending of library materials between library authorities to satisfy reservations.
- Public online interface – the front end web interface for library users to discover resources, interact with the library and manage their loans, personal details etc.
- Reporting – allows library staff to produce reports on data held within the system.

The LMS also connects with a range of third party products including public access PCs, self - service kiosks, council finance systems and electronic resources (e.g. eBooks).

Step 2: What information do we have?

Analysis of impacts on people with protected characteristics must be rigorous. Please demonstrate your analysis of any impacts in this section, referring to all of the equalities groups as defined in the Equality Act 2010.

3.1 Does the proposal have any potentially adverse impacts on people with protected characteristics?

The replacement LMS will be delivered via a web browser interface accessible on a range of devices including desktop PCs, laptops, tablets and smart phones.

It was specified in our requirements that the browser-based staff interface must be based on a responsive design that adapts to different screen sizes without any loss of functionality or compromise in usability. It must do this on a variety of devices including desktop PCs, laptops, tablets and smart phones.

It was clearly stated in the technical specification sent to prospective bidders, and on which each submission was evaluated, that the staff interface must as a minimum requirement comply with relevant provisions of the following:

- Web Accessibility Initiative Level AA
- Special Educational Needs and Disability Act 2001
- Data protection Act 1998
- Equality Act 2010

It was also specified in the technical specification that the staff interface must include accessibility features, and must allow individual members of staff to tailor the interface to meet specific personalisation needs. These may include accessibility software (e.g. JAWS, Super Nova), language options and support for staff with visual impairments (e.g. customisable colour schemes).

During the implementation process, we will ensure that all staff receive training in using the new system. The level of training will vary depending on the different staff roles, which range from front line staff to back office staff in bibliographic services units and customer contact centres.

We do not believe there will be any adverse impact on people with protected characteristics. The basic management system is the same as the one used now, this is just an updated version. One advantage of the new system is we will be able to retrieve a more comprehensive profile of our active users. Each of the identified needs has been included in the technical specification sent to prospective bidders, and on which each submission was evaluated.

Library Users:

It is probable that the replacement LMS will have the following impacts on library users from the following groups with protected characteristics. We have ensured that each of the identified needs is reflected in the technical specification.

Disability: Library users who are less mobile as a result of a physical or visual disability are more likely to rely on remote methods of using library services so we will need to ensure that the replacement LMS is fully accessible. The user interface will need to be clearly laid out, intuitive and easy to use, and comply with all accessibility standards. It will allow for personalisation so that a user with visual impairments can access all of the required functionality. The current LMS already allows access to ebooks etc but it doesn't list them all in the same place so the new one will make choice of format easier eg LPrint or E book.

continues with the new LMS.

Carers: We will ensure that the new LMS will continue to allow individuals to link their library membership to other members for the purposes of managing loans etc. This will specifically apply to parents and their children, and to adults with caring responsibilities.

As an overarching principle, we will also ensure that the new LMS is capable of recording all of the required data on library members to enable us to carry out service analysis. A requirement for this is being written into the Technical Specification.

Staff Users:

It is probable that the replacement LMS will have the following impacts on staff users from the following groups with protected characteristics. We will ensure that each of the identified needs is reflected in the technical specification.

Disability: The staff user interface will need to be clearly laid out, intuitive and easy to use, and comply with all accessibility standards. It will allow for personalisation so that a staff user with visual impairments can access all of the required functionality. We will ensure that this requirement is written into the Technical Specification. Staff who use assistive tech will need to be involved in testing before it goes live. Furthermore, we will carry out user testing (both staff and end users) on the replacement LMS, using the Compass Disability Service Level Agreement which will be managed through Somerset County Council.

Age: We will ensure that all staff are provided with support and guidance to enable them to make full use of the new LMS to carry out their job effectively. It will be particularly relevant as we increasingly rely more on technology to deliver our service to users. Particular attention will be paid to the needs of older staff members who may be less comfortable with new technology as part of training during the implementation process.

Race: We do not consider there to be any specific requirements relating to this group.

Sex: We do not consider there to be any specific requirements relating to this group.

Gender reassignment: We do not consider there to be any specific requirements relating to this group.



Marriage & Civil Partnership: We do not consider there to be any specific requirements relating to this group.

Pregnancy & Maternity: We will ensure that any staff members who are on maternity leave during the implementation of the project receive full training on use of the new LMS and its implications for the service and their particular role on their return to work.

Religion & Belief: We do not consider there to be any specific requirements relating to this group.

Sexual Orientation: We do not consider there to be any specific requirements relating to this group.

3.2 Can these impacts be mitigated or justified? If so, how?

X Service Director Sign-Off: 	Equalities Officer Sign Off: 
Date: 17/4/15	Date: 15 th April 2015