Finance Department
Purchasing Division

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REQUEST FOR PROPOSALS (RFP)
Specification No. 26-11754-C Reissue
FOR
LIBRARY DIGITAL EXPERIENCE PLATFORM
PROPOSALS WILL NOT BE OPENED AND READ PUBLICLY

ADDENDUM "A"
01/06/2026

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Dear Proposer:

Questions received from proposers along with answers are attached.

Proposals/bids must be received no later than 2:00 pm, on <u>Tuesday, January 20, 2026.</u> All responses should be sent via email to <u>Solicitations@berkeleyca.gov</u> and have **"LIBRARY DIGITAL EXPERIENCE PLATFORM"** and **Specification No. 26-11754-C Reissue** indicated in the subject line of the email. Please submit one (1) PDF of the technical proposal. Corresponding cost proposal shall be submitted as a separate PDF document.

Proposals will not be accepted after the date and time stated above.

We look forward to receiving and reviewing your proposal.

Sincerely,

Henry Oyekanmi
Finance Director

Questions and Answers for Specification No. **26-11754-C Reissue**
LIBRARY DIGITAL EXPERIENCE PLATFORM

The City of Berkeley has received questions from some potential respondents regarding **Specification No. 26-11754-C Reissue**, **LIBRARY DIGITAL EXPERIENCE PLATFORM**. In an effort to provide the same information to all, listed below are the questions received to date, with responses from City staff.

1.Q. Could you please confirm the legal service area population the Library uses for planning and reporting?
1.A. Legal service population is approximately 120,000.

2.Q. Will the Library be providing translated website content in Chinese and Spanish, or would you prefer the vendor to assist with translation and localization? Is continued use of Google Translate acceptable?
2.A. The Library will not provide translated website content. Our first preference is for the vendor to assist with translation and localization. We will also consider continuing use of Google Translate for the website if the vendor does not provide translation and localization.

3.Q. How does the Library define "equity-centered navigation" in the context of this project? Are there specific metadata standards, design principles, or community engagement practices you expect from vendors?
3.A. In the context of the overall project, please see Answer for Question 62. Within the context of the discovery layer, equity-centered navigation refers to the metadata design, indexing, and search pathways that promote equitable access and representation across Berkeley Public Library's collections. It extends beyond visual or website navigation to include how users explore and discover materials through culturally responsive metadata, inclusive vocabularies, and user-centered search experiences.

Key expectations include:

• Compliance with WCAG 2.2 AA standards and full interface multilingual access

• Support for metadata elements for example: MARC 386 (Creator Demographic Group), Homosaurus, Indigenous subject headings, and other local or identity-based vocabularies.

• Ability to configure sidebar facets, that let users refine searches by creator characteristics, representation, or other inclusive metadata fields.

The Library recognizes that equity-centered navigation is a work in progress and will be developed in partnership between the Library and the selected vendor. It is not expected to be delivered "out of the box." Implementation will be an iterative process informed by evolving metadata standards, and collaborative design between the Library and vendor.

4.Q. Are the three required meetings intended to align with specific project milestones (e.g., discovery, testing, launch), or is the timing flexible based on project needs?

4.A. Timing is flexible based on project needs and will be discussed with the selected vendor.

5.Q. Could you provide an estimate of the number of pages or content types to be migrated from the current Drupal site? Are there any legacy formats, custom modules, or integrations we should be aware of?
5. A. See answer below to question 36.

6.Q. Would the Library also be open to considering other integrated event and room booking platforms if they meet accessibility, usability, and functional requirements?
6.A. At this time the Library is not seeking a new event and room booking platform, but if one is proposed, the proposal should include the cost of the platform annually and a detailed description of the product and the migration process. Additionally, if proposed the proposal should also describe the advantages of moving to a different platform.

7.Q. Are there specific collections or platforms vendors should plan to integrate with for the institutional repositories, local history collections, and digital archives? Do they currently have associated MARC records?
7.A. Berkeley Public Library's work in developing and organizing its digital and local history collections is in progress. The Library does not currently host digital collections but may build them in the future.

Not all materials currently have MARC records. Future digital collections may use a variety of metadata structures depending on the selected repository platform. The Library recognizes that digital collection systems may employ both structured and unstructured data. Vendors should describe how their discovery layer can harvest, normalize, and crosswalk metadata from diverse sources to ensure consistent indexing and display. The selected discovery platform should be capable of adapting to growth and supporting future integration of diverse metadata sources.

8.Q. Could you share which content enrichment services the Library currently subscribes to?
8.A. Syndetics and Novelist.

9.Q. The RFP outlines vendor-led design with multiple review phases. Is there internal design expertise at the Library that would actively participate in shaping UX and visual design, or should vendors plan to fully lead these efforts?
9.A. The Library has a number of staff who will participate in the UX and visual design process with varying degrees of experience in UX and visual design. However, we would look to the vendor for expertise in and guidance on UX and visual design development and to lead the process.

10.Q. For International Language Support, are English, Chinese, and Spanish the only additional languages you require? What variant of Chinese are you looking for?
10.A. Yes, we for launch, we are only asking for English, Chinese and Spanish language translation. We want Simplified (or Traditional) Chinese.

11.Q. For translation, do you have a preferred approach (human or machine translation)?

11.A. Machine translation

12.Q. For language translation, do you expect full content parity across languages?
12.A. Yes.

13.Q. Can you share requirements for "Equity Centered Navigation?"
13.A. See answers for questions 3 above and 62 below.

14.Q. Do you have a preferred hosting provider?
14.A. No, we do not have a preferred hosting provider.

15.Q. Do you have a preference on CMS options? Do you prefer Open Source or a SaaS CMS?
15.A. We are open to different possible Content Management Systems.

16.Q. For chat, do you expect native CMS functionality or integration with an existing tool (e.g., LiveChat)? Any staffing/SLA expectations?
16.A. No, chat doesn't necessarily have to be part of the CMS. We do not currently have an existing chat product that we integrate with. We would most likely set hours when human staff members would be staffing the chat interface, and other times when we would expect the chat feature to provide the best possible answer to questions when staff are not available.

17.Q. Are you expecting a built-in CMS search, a third-party search service? (noting that a 3rd party will have incremental cost, but provide a much more robust experience).
17.A. We prefer a search service that is strong in relevance ranking, similar to results Google search provides. If that is built into the CMS that would be acceptable, but we are also willing to consider a third-party search service as long as the service has a very strong privacy policy.

18.Q. Please confirm whether the current Communico instance will remain, and whether you expect embedded widgets vs. API-level integration for events.
18.A. Yes, the Communico system will continue to be the system for publishing events on the site as well as for booking rooms at the Library. The integration will continue to rely on widgets and direct calls to the Library's instance of Communico depending on the use case.

19.Q. You note CARL ILS limitations and an undisclosed ranking model. Will the CARL team provide API documentation and a sandbox for index, holds/requests, fines/fees, and authority data?
19.A. CARL APIs and documentation will be made available to the selected vendor.

20.Q. You intend to enhance your bibliographic records with additional metadata. Will this work be complete before the website development begins?
20.A. Metadata enhancement is an ongoing process. Some enhancements (such as the addition of MARC 386 creator demographic data and local subject headings) are already underway.

21.Q. Please confirm pick up rules. Will this be limited to pickup/return only or also include availability, pick up logic, hold time?

21.A. The discovery layer serves as an interface, not a circulation system. It displays and interacts with the live data managed by the CARL ILS but does not replicate or override the ILS's business logic. All loan policies, hold queues, and pickup logic are governed by the ILS. The discovery layer should surface this information for users and staff, ensuring accuracy and consistency, but not duplicate or re-calculate it.

22.Q. Several features are listed as possibilities (recommendations, visual search, AI integration). Which are baseline launch vs. future-phase/nice-to-have so we can scope accurately?
22.A. Recommendations in the Discovery Layer is a required launch feature. Visual search and AI integration are "nice to have" and it is acceptable if these are proposed for a post launch implementation.

23.Q. You call for LCNAF/LCSH/LCGFT and local authorities with browse, cross-refs, and preferred-term resolution. Do you require full authority-driven redirects at search time, or is display-only acceptable at launch?
23.A. The Library uses authority control to support consistent and inclusive discovery. References to LCNAF, LCSH, LCGFT, and local authority files are provided as examples only of the types of vocabularies the discovery layer should be able to support. The Library may adopt or develop additional vocabularies or linked data sources as part of its ongoing metadata and DEI initiatives. The discovery layer should be flexible to accommodate future vocabularies and to expand to new or emerging authority structures without major redevelopment.

24.Q. You require SSO across website and discovery. Which is in place today or should we plan for, and do you need patron-level personalization tied to SSO?
24.A. The Single-Sign on requirement is for the Discovery layer and underlying Catalog that public users log into only. As the Discover Layer lies on top of the exiting Catalog, and that catalog already has user logins, those logins should used for existing users' logins.

25.Q. For "shared search," should the website search box query the discovery index directly, or should both systems publish to a shared search service? Any expectation for federated results/"blended" UI?
25.A. Search on the website should have a selector (e.g. radio button or menu) to choose "Discovery Layer, "Website", "Tools" or "Link+" as the services that will be searched. Please refer to https://www.berkeleypubliclibrary.org for an example. Searches will be conducted on the selected service and results would come only from the system searched.

26.Q. For fines and fees: Should the discovery layer integrate with the existing online payment provider and will we be provided with specs/test accounts?
26.A. Yes if possible. If vendor is not able to add payment functionality to the discovery layer, a there should be an option to "Pay fees" that links to the underlying catlog sign-in page.

27.Q. Do you have a required analytics stack? Do you expect cross system funnel tracking?
27.A. We use Google Analytics. We do not have funnel tracking set up on GA at this time.

28.Q. Do you have a specific list of deliverable artifacts for this project?

28.A. No.

29.Q. After the six-month implementation, the RFP mentions a three-year support/maintenance/subscription period. Should pricing break out annual support for each part separately.
29.A. Yes.

30.Q. Please confirm data-retention policies and privacy expectations for personalized recommendations and analytics (PII storage, anonymization, and data-processing addenda).
30.A. User related data should be stored indefinitely or until a user account is deleted from the system by library staff. Analytics should be saved for a 5-year period.

31.Q. Please confirm what staff will be dedicated to this project, to allow for the quick 6-month delivery of your requirements?
31.A. We anticipate a Team made up of 5-7 staff will be involved in the implementation process.

32.Q. How much time do Berkeley Library staff require for decision making and approvals of UX, Design, and Technical decisions?
32.A. We will negotiate that with the selected vendor.

33.Q. Can you confirm the MVP scope for both parts (Website/CMS and Discovery Layer)?
33.A. The website MVP should be a website with all of the features and functionality of the Library's current website https://www.berkeleypubliclibrary.org/.

We require a fully functional discovery layer at launch that meets the bulk of the requirements outlined in the RFP excepting any AI components which are nice to have but we recognize may require additional development/exploration. This system is replacing our existing catalog interface and must provide complete search, display, and user account access functionality from day one.

Additionally, the Library recognizes that equity-centered navigation is a work in progress and will be developed in partnership between the Library and the selected vendor. It is not expected to be delivered "out of the box." Implementation will be an iterative process informed by evolving metadata standards, and collaborative design between the Library and vendor.

34.Q. What are the must-have user journeys at launch?
34.A. We have not yet mapped use journeys and expect that this would be part of the Discovery process.

35.Q. What are your success metrics?
35.A. See answer to question 33.

36.Q. Is there a canonical content list (pages to migrate/create)?
36.A. There are approximately 800 pages, however, some content on some pages is stored as

"blocks" in Drupal terminology. There are approximately 250 blocks. Additionally, there are "slideshows" a content type created by the Library in Drupal witch consists of A. the "header slideshow" at the top of our web pages that prominently feature upcoming events, programs or services offered by the Library and B. book images in horizontal slideshows where each item displayed links to the the online catalog. There are approximately 200 slideshows which should be migrated to the pages which should appear on the pages from which they are linked to. Additionally, there are approximately 18,100 static files that must be migrated and mapped to the pages which link to them.

37.Q. Will content drafting start in parallel with IA/wireframes? Are there PDFs that must be converted to HTML?
37.A. It is difficult to predict how much content will be created during the implementation of the website. There are no PDFs that are required to be converted to HTML. The Library anticipates that there will be a period of time when new content creation will be put on temporary hold until after existing content is migrated.

38.Q. Any security reviews (penetration tests, policy sign-offs) that could block releases?
38.A. We have not planned any at this time, but if the vendor recommends them please state that in the proposal.

39.Q. Please provide a list of the collections, subscription databases, and electronic resources to be incorporated into the discovery layer and federated search. For each collection, please let us know (at a high level) the kinds of items or objects in the catalog, the volume of items, and the name and version of the platform used to manage/access the collection.
39.A. In general, the discovery layer will integrate:
• Carl ILS bibliographic records (print and media collections)
• eBook and eAudiobook collections (e.g. OverDrive, Hoopla. Kanopy)
• Subscription databases (e.g., EBSCO (which aggregates data from many of our online databases), Gale, Encyclopedia Britannica)
• Future digital collections once developed

40.Q. Section 1.3 calls for real-time availability status for all formats and editions of the same title. More generally, is the expectation that the discovery layer and associated search features reflect the current state of underlying catalogs and systems in real- or near-real time wherever possible, recognizing that requirement may influence the system design?
40.A. The Library expects the discovery layer to reflect the current state of holdings and availability as in real time consistent with CARL API performance and caching capabilities. Vendors should describe how their solution manages synchronization and refresh intervals for accurate item status.

41.Q. Section 1.3 has a requirement for related work connections or "links between related works, series, and companion materials." Is the goal to link items across collections? If so, are these links—or the metadata needed to easily create these links—present in the collections today or is the expectation that the discovery layer will be able to generate these links based on metadata gathered from the source systems?

41.A. Regarding Section 1.3 FRBR and Record Grouping we require functional work level grouping that displays different formats/editions of the same work with real-time availability at launch. . The goal is for the Discovery Layer to support FRBR-based related work linking-establishing visible connections among related titles, formats, series and companion materials. This would be across collections if applicable. The Library's MARC records contain metadata that supports this functionality. For example but not limited to Uniform titles (MARC 130/240) and related work tags (MARC 7XX fields); Identifiers like ISBN,ISSN, and OCLC numbers for grouping editions and formats; Authority controlled relationships. The Discovery layer should leverage existing metadata elements. If metadata is incomplete the Discovery layer should be capable of inferring or enhancing links algorithmically. Vendors should ensure their proposed solution supports FRBR-informed metadata -driven related work lining as specified in Section 1.3 of RFP.

42.Q. Section 2.1 of the RFP lists "Comprehensive APIs for data exchange and system communication" as a requirement. Can you provide a short description of some key use cases for the APIs? What kind of data would be exchanged at the discovery layer level? Would any communication between system require "real-time" performance characteristics? Detailed requirements are not required, but it would be helpful to understand the broad use cases.
42.A. The Library expects the discovery layer to include APIs that support data exchange and interoperability between the discovery platform, the CARL ILS. All patron-facing transactions (e.g., holds, renewals, account views) should occur in real time through APIs. Metadata and bibliographic updates should refresh in real or near-real time to maintain accuracy in search results.

43.Q. Section 4.3 lists requirements for authority record integration and "real-time authority updates." Can you expand on this requirement? How do you see the role of the new discovery layer and web site with regard to authority control records including "synchronization with authority record changes and updates?" Also, do you maintain local authority files?
43.A. The discovery layer should support ongoing synchronization with authority records in the CARL ILS or other linked data sources. When authority records are updated—whether LC, local, or Homosaurus-based for example, the discovery index should refresh corresponding terms. The Library maintains both LC authority files and local authority entries for names, subjects, and genres. Real-time updates are preferred.

44.Q. To ensure our team is perfectly aligned with the Library's vision for the long term, we wish to confirm our understanding of the technical architecture described in the RFP. We interpreted the requirements as calling for a deeply integrated platform where the public-facing Website/CMS and the Discovery Layer function as a single, cohesive "digital branch" for patrons.
44.A. Yes, on the surface the website and discovery layer should appear to be a unified system, however we recognize that there are a number of ways to achieve that, one example is two sites (a web server and a discovery layer server) that run side by side, each of which has different functionality, but which share all major design elements. In particular from the website, it should be possible to enter a search that will be passed on to and conducted by the discovery layer, and

search results will appear on the discovery layer, not on the website. See our current website for an example of how a search box with selectors allows the user to search the Library's website, or the online catalog, as well as a separate instance of the catalog which contains only the Library's tools collection: www.berkeleypubliclibrary.org.

45.Q. To ensure our team is perfectly aligned with the Library's vision for the long term, we wish to confirm our understanding of the technical architecture described in the RFP. We interpreted the requirements as calling for a unified user experience with seamless navigation, shared authentication, and consistent design across both components.
45.A. Yes to seamless navigation and consistent design across both components. Since public users do not login to the Library's website, only Library staff who work with the website for the purposes of content management and creation, the login to the website will be different from the discovery layer which public users may login to view their library accounts. The Discovery Layer login must connect to the underlying Catalog's user database to access existing users' login information and must pass new user login information back to the underlying Catalog.

46.Q. To ensure our team is perfectly aligned with the Library's vision for the long term, we wish to confirm our understanding of the technical architecture described in the RFP. We interpreted the requirements as calling for. A technical architecture where the website's search functionality directly passes queries to the discovery layer, providing a single starting point for all resource discovery.
46.A. Yes.

47.Q. What is the anticipated budget range for this project?
47.A. While the budget is important it is not the most important factor by which we will be considering the proposals, we will be assessing them overall as to how well they meet the requirements.

48.Q. Can you provide details on CARL ILS API documentation and integration requirements?
48.A. That information will be provided to the selected vendor.

49.Q. What specific discovery layer features beyond basic search are most critical? Are there existing vendor relationships or incumbent preferences?
49.A. We require a fully functional discovery layer at launch that meets the bulk of the requirements outlined in the RFP excepting any AI components which are nice to have but we recognize may require additional development/exploration. This system is replacing our existing catalog interface and must provide complete search, display, and user account access functionality from day one. Additionally, the Library recognizes that equity-centered navigation is a work in progress and will be developed in partnership between the Library and the selected vendor. It is not expected to be delivered "out of the box." Implementation will be an iterative process informed by evolving metadata standards, and collaborative design between the Library and vendor. There is no existing discovery layer vendor.

50.Q. What volume of content needs migration from the current Drupal site?
50.A. 17G of files, 435MB of code (including dependencies and compiled assets) 532MB of

database. Additionally see answer to question 36 above.

51.Q. Preferred CMS / Drupal: We note that the current website runs on Drupal. If all existing pain points are addressed and requirements fulfilled, would the City prefer to remain on Drupal, or is the City fully open to other CMS platforms?
51.A. The Library will consider proposals that propose Drupal as the CMS. At the same time, we are open to other CMS options if they meet our requirements.

52.Q. Budget Parameters: The RFP does not include a budget range or allocation for this project. Is there a set budget or budget goals that proposers should be aware of to appropriately scope implementation and the three-year support/maintenance component?
52.A. While the budget is important it is not the most important factor by which we will be considering the proposals, we will be assessing them overall as to how well they meet the requirements.

53.Q. Timeline Flexibility: The RFP specifies a six-month implementation period beginning March 2026. Given that similar combined Website + Discovery Layer projects often require 9–12 months for effective design, development, integration, and testing, does the City have flexibility on this timeline, or is the six-month implementation period a firm requirement?
53.A. The Library will consider a longer timeline if the proposal meets our specified requirements.

54.Q. **Content Migration Scope: For the website redesign, will the City provide an estimated number of pages or digital assets (documents, images, multimedia) expected to be migrated from the current Drupal site?**
54.A. See answer to question 50 above.

55.Q. Mandatory Integrations: The RFP references integrations such as Communico, Google Analytics, CARL ILS (with Tool Lending), Link+, subscription databases, digital collections, WorldCat, SSO/SIP2, OPAC payments, and others. Can the City confirm which of these are mandatory for the base proposal and which are optional or future-phase enhancements?
55.A. All above integrations are required at launch. For clarification of SSO question see answer to question number 24 above.

56.Q. Discovery Layer Integrations: The RFP requires integration with the CARL ILS and federated search of subscription databases. Can the City confirm the number of subscription databases and third-party digital collections to be included at launch?
56.A. See answer to question 39 above.

57.Q. AI Features: The RFP references AI capabilities (predictive search, smart recommendations, AI for assistance). Does the City have specific AI use cases in mind, or should vendors propose based on industry best practices?
57.A. Vendors should propose based on industry best practices. Note that this requirement is considered "nice to have" but will not be a determinant factor in the proposal evaluation process.

58.Q. Accessibility Testing & Compliance: Does the City require the WCAG 2.2 accessibility audit to be performed by an independent third party, or will vendor-led testing with documentation be acceptable?
58.A. We recommend that the proposer use an independent third-party tool to demonstrate compliance with the WCAG 2.2 guidelines.

59.Q. Hosting & Security: The RFP calls for cloud hosting with 99.9% uptime. Does the City have a preferred hosting environment (e.g., AWS, Azure, Pantheon, Acquia), or should vendors recommend options?
59.A. Vendors should recommend options.

60.Q. Post-Launch Support The RFP requires a three-year support, maintenance, and subscription period. Does the City expect a fixed annual subscription model, or time/materials-based support with defined SLAs?
60.A. We expect a fixed annual subscription model with a description of the SLA offered by the vendor.

61.Q. Equity-Centered Navigation: Could you provide more details on what you envision for "equity-centered navigation"? Are there any user personas or specific scenarios you'd like us to consider during the design process?
61.A. Equity-centered navigation ensures that every patron, regardless of race, language, ability, or familiarity with library systems, can find and feel represented in what they discover. This means designing a discovery layer and website that surfaces diverse voices, uses inclusive metadata, and anticipates multiple literacies. Navigation pathways should be adaptive and intuitive for first-time users as well as power researchers, with plain-language explanations, multilingual options, and an accessible design. We envision an experience that celebrates community identity and curiosity while minimizing structural barriers to information.
    Personas to consider:
- A longtime resident unfamiliar with digital systems.
- A teenager looking for music, events, and maker materials, not just books.
- A parent or caregiver navigating in English as a second or third language.
- A university researcher or student seeking representation and context-sensitive search results.
- Homebound patron only interested in online materials

62.Q. Discovery Layer Branding Alignment: Are there any specific visual elements, color schemes, or branding guidelines from the Discovery Layer that we should incorporate into the design to ensure alignment?
62.A. The Library does have a style guide with logos and color combinations that are preferred. This information will be provided to the selected vendor.

63.Q. Custom Content Types: Could you clarify what types of content you would like to manage in WordPress (e.g., books, events, blog posts)? This will help us build flexible templates and structures.
63.A. We have several custom content types including "Popular Topics" blocks, site alerts, book

carousels, header slideshow, general slideshow, locations pages. We make extensive use of customized Drupal "blocks" as you can see from our site: www.berkeleypubliclibrary.org.

64.Q. User Roles and Permissions: Can you outline the different user roles within your staff, and what specific permissions each role should have in the CMS? For example, who can create, edit, approve, or publish content?
64.A. Administrator, Author. Currently our roles are very limited, with the site administrator creating most of the content without an approval flow. We still wish to have an Author role and may decide on additional roles at a future date.We will provide the selected vendor with the permissions we would like for each role.

65.Q. Approval Workflows: Could you describe your approval workflow for content updates? Are there specific stages (e.g., draft, review, approval) and roles involved in this process?
65.A. Approval flows are done offline through various communications with the site administrator and authors. We will consider whether we wish to incorporate approval flows in the CMS during site development.

66.Q. Cloud Hosting Provider: Do you have a preferred cloud hosting provider (e.g., AWS, Google Cloud, or others)?
66.A. No we do not have a preferred hosting provider.

67.Q. Backup Scope: For the daily incremental backups, would you like us to include the entire WordPress site, including the database, media files, and themes, or just specific parts?
67.A. All components daily and monthly.

68.Q. Training Scope: Could you let us know which staff roles need training on WordPress? Should we focus on content creators, site admins, or both?
68.A. Both.

69.Q. Video Walkthroughs: Would you prefer video walkthroughs for training on specific features or workflows? If so, which areas would you like us to cover in detail?
69.A. Video walkthroughs would be acceptable as supplemental training material, but we would prefer to have at least 1 or 2 live trainings as well as a user manual.

70.Q. CARL ILS Integration: For the API integration with CARL ILS, do you have any specific requirements or configurations we need to be aware of? Have you already established the necessary API access credentials?
70.A. That information will be provided to the selected vendor.

71.Q. Inclusive Metadata Structures: When implementing inclusive metadata structures (e.g., MARC 386, Homosaurus), would you like assistance in defining the metadata fields, or do you have a clear idea of how you'd like them structured?
71.A. No, specialized Library staff trained in MARC and RDF will defining these fields.

72.Q. Equity-Centered UX Testing: What does "equity-centered UX testing" mean for your team? Do you have specific testing criteria or a methodology you want us to follow, or would you like us to define this as part of the process?
72.A. Equity-centered UX testing prioritizes participation and feedback from communities historically underserved by traditional design processes. Our goal is to create a discovery and website experience that feels welcoming, intuitive, and trustworthy for all users. We expect testing to engage patrons with diverse lived experiences, across race, ability, language, and age, and to assess not only usability but also inclusion, accessibility, and cultural resonance. We welcome proposals that integrate community co-design, accessible testing tools, and transparent sharing of results to ensure equity informs every design decision. If the organization has additional criteria they have used, please define them and include them as part of the process.

73.Q. Do you have any brand guidelines (logo, colors, typography, UI standards) available for the new website?
73.A. No. Please review current website for existing branding: https://www.berkeleypubliclibrary.org

74.Q. Are there any reference websites you like or would want us to take inspiration from?
74.A. No.

75.Q. Should the catalog and the main website appear as a single unified system in terms of design and user experience, or should they remain visually distinct?
75.A. The website and catalog should have the same branding and appear to be unified. However, the structure of the website and catalog will necessarily differ due to the nature of the content of each entity.

76.Q. What is the approximate number of pages to be migrated to the new website?
76.A. See answer **#36**.

77.Q. What is the estimated volume of media assets (images, videos, audio) and documents (PDFs, MP3s, etc.) to be migrated?
77.A. See answer **#50**.

78.Q. Are there any SEO considerations we should follow during migration (such as URL preservation, redirects, metadata retention)?
78.A. The Library has not developed any SEO criteria. It is expected that the vendor would propose a rubric for SEO.

79.Q. How should translations be managed:
79.A. The vendor is expected to propose a solution for translation of content.

80.Q. Should all content be multilingual, or only specific sections/pages?
80.A. All content.

81.Q. What user roles are required (e.g., Author, Editor, Librarian, Admin)?
81.A. See question 64.

82.Q. How many approval levels are required before content is published?
82.A. These will be defined at the system design stage.

83.Q. Should publishing workflows vary based on content type or entity?
83.A. The majority of content will be published in real time, though it should be possible to save content as unpublished drafts and also to preview content before publishing. The ability to schedule certain content types, such as Alerts (e.g. regarding holidays, other important announcements) is required. Scheduling capability should include publishing and unpublishing (but not deleting) specific content types on specific dates and times including the hour and minute of the day.

84.Q. Is content rollback/versioning required?
84.A. Yes.

85.Q. Is a room booking system required in the newly developed website?
86.A. Not at this time. The Library currently uses the Communico product to publish events and to book rooms.

86.Q. Should login and signup functionality be part of the new website, or should existing authentication remain unchanged?
86.A. Only staff will have accounts on the website. The Library will provide a list of staff accounts to be created or they will be created by the designated website administrator(s). Library patron (public user) accounts on the Discovery Layer will be based on the patron's library card number and PIN, established at the time of patron account creation, usually initiated by staff in the underlying library catalog and circulation system.

87.Q. Do you require a newsletter signup feature on the website?
87A. The Library uses a third party system for newsletters, website users will sign up via a link on the website.

88.Q. Should the website include a tabular section displaying upcoming meetings and meeting materials (MP3 and PDF)?
88.A. Yes. See https://www.berkeleypubliclibrary.org/about/board-library-trustees for an example.

89.Q. Do you require a global search feature across the website, or should the existing external search widget continue to be used?
89.A. The library website currently utilizes the built in Drupal search function. Search functionality for the website should be provided by the vendor.

90.Q. We will provide advanced search capabilities using Drupal. If you would like to include data from external platforms in the search results, will you be able to provide access to external databases or APIs for indexing?
90.A. No website searches should only include content from the website, not from external sources. If a Discovery Layer is being proposed, provide information on the Discovery Layer's

capabilities to conduct searches of external databases.

91.Q. Do you agree with storing all media assets in object storage (e.g., cloud-based storage) for better performance and scalability?
91.A. Yes.

92.Q. Is real-time chat required between patrons and staff?
92.A. Real-time chat is a desired feature. Vendor should specify if that is an available option and if it allows for scheduling of chat service hours (based on staff availability).

93.Q. Who will be responsible for purchasing and managing hosting for the website?
93.A. Vendor should propose hosting as part of their proposal. Managed hosting is strongly preferred including live, development and production environments, automated backups, system software upgrades and patches, and technical support for the website platform included in the pricing.

94.Q. Are there any compliance or security standards that must be met (e.g., SOC 2, ISO, FedRAMP)?
94.A. In addition to standard SSL/TLS encryption for content, please provide the security services offered including pricing. This would include SOC services, firewall services, DDoS prevention, monitoring, etc.

95.Q. Do you have a preferred cloud provider, or should we propose suitable options?
95.A. Please propose options.

96.Q. Which content types should be indexed by website search (e.g., pages, blogs, PDFs, policies, FAQs, staff pages, catalog items)?
96.A. All of the above.

97.Q. When a user performs a search, which source should be prioritized first:?
97.A. Search will be dependent on the source chosen by the end-user. Options should include search of website and separately, search of the catalog via the Discovery Layer.

98.Q. Should archived or unpublished content appear in search results?
98.A. Only for staff users when logged in.

99.Q. Should the search experience support AI-based or semantic search (understanding intent rather than exact keywords)?
99.A. We are interested in exploring AI search options. Vendor should specify in submitted proposal what AI capabilities exist, if any.

100.Q. What is the expected data volume under: normal traff (number of records), peak usage (searches per minute)?
100.A. Google Analytics does not track data transfer. On an annual basis the Library's current website receives 1.6 million page views per year or approximately 133,333 monthly page views.

101.Q. Do you require role-based access control (RBAC) for search results?
101.A. Public searches (with no login to website) should include all relevant published website content. Staff who are logged in should also be able to see all relevant unpublished and archived content in addition to published content.

102.Q. Is there a preferred search engine or technology, or any specific technical requirements we should consider?
102.A. The Library does not have a preferred search engine or search technology.

103.Q. How should restricted or limited-access items appear in results?
103.A. Not applicable.

104.Q. Should advanced search support nested Boolean logic (AND/OR combinations), or only basic filtering?
104.A. Vendor should specify if Boolean logic is supported.

105.Q. How critical is it that availability information is always accurate:
105.A. Do not understand this question.

106.Q. If one integrated system is temporarily unavailable, should search?
106.A. Site search or Discovery layer search will not be available if system is unavailable.

107.Q. Which is more important, extremely fast search responses or perfect accuracy at all times?
107.A. Accuracy is preferred, however, the search process should not be perceptibly slow for end-users.

108.Q. Which fields should always perform well in search (e.g., Title, Author, Subject)?
108.A. Keyword searching should be based on a relevancy algorithm. The ability to search specifically by Title, Author and Subject should be a separate options.

109.Q. When filtering by year, should users choose from preset ranges or select exact date ranges?
109.A.Sorting search results by most recent to oldest should be an option.

110.Q. Should search behave like Google, showing useful results even if keywords are not an exact match?
110.A. Capability to do keyword expansion (e.g. "walk", "walking") is desirable as is phrase searching, (e.g. "black cat").

111.Q. Which filters should always be available? Format, Location, Availability, Subject.
111.A. Format, Location, Availability.

112.Q. Should library staff be able to add or modify filters without technical assistance?
112.A. Yes.

113.Q. Should filters be displayed in all supported languages?
113.A. Yes.

114.Q. Should search results be language-isolated?
114.A. Search should be possible in the supported languages.

115.Q. Is cross-language search expected?
115.A. No.

116.Q. Should translated content be manually curated or auto-translated at query time?
116.A. Vendor should propose.

117.Q. When an item becomes unavailable, should filter counts update immediately or shortly after?
117.A. If possible yes but not mandatory.

118.Q. What should influence result ranking most (availability, popularity, recency, proximity)?
118.A. Keyword matching (including frequency of word in individual results and keyword expansion) followed by recency and then popularity.

119.Q. Should some collections appear differently than books in search results?
119.A. Format of materials will be indicated by format designation and icon.

120.Q. Should staff be able to highlight or promote specific items or collections?
120.A. Need more information to answer.

121.Q. Should different formats of the same title appear grouped or separately?
121.A. The Library prefers title level grouping with available multiple formats displayed in the title level record.

122.Q. How should translated versions be displayed?
122.A. Works in translation appear on their own bibliographic record and have an 041 tag in Marc record.   Additionally they could have a 655 tag as well as a 546 note field as seen in these two examples:

Colson whitehead's Underground Railroad (Spa)
https://catalog.berkeleypubliclibrary.org/?section=resource&resourceid=13319549

Colson whitehead's Undergraound Railroad (Eng)
https://catalog.berkeleypubliclibrary.org/?section=resource&resourceid=2404643

123.Q. When multiple formats are available, which should be shown by default?
123.A. Formats should be grouped under title by: Book, eBook, Large Print, Downloadable Audiobook.

124.Q. If some formats are unavailable, how should this be communicated to users?
124.A. If format exists in the catalog but is checked out, "Unavailable" should be noted. If a particular title does not have an item of a particular format, that format should not be listed under the title.

125.Q. If an item has limited metadata, should it still appear in search results?
125.A. Yes.

126.Q. Are there collections with special rules (e.g., tools, equipment, restricted items)?
127.A. Please see the Library's Circulation Policy for a list of Circulation rules: circulation_policy_approved_2022_09_07.pdf.

127.Q. Should pickup and return rules be clearly shown before placing a request?
127.A. Not necessarily.

128.Q. Do these rules vary by location, and should staff manage them centrally?
128.A. The rules for tools versus all other materials are described in Q. 126.

129.Q. After logging in, what actions should users be able to perform (save searches, lists, holds, pay fines)?
129.A. This should be configurable. For initial login, prefer, current account activity, i.e. checked out items, items on hold and overdue items. All other options should be a choice the user selects.

130.Q. Should users be able to view their past activity?
130.A. This should be an opt-in feature.

131.Q. How long should search history and activity data be retained?
131.A. This should be configurable by the Library.

132.Q. Are there any privacy or data protection requirements we should follow?
132.A.

133.Q. How should users authenticate (existing login or SSO)?
133.A. For the website, if available, SSO, if not, individual accounts created on the website. For the Discovery layer, that will be determined by the user's record in the circulation system.

134.Q. Once logged in, should users remain logged in across website and catalog?
134.A. No, they are two separate, unlinked accounts. Each account should have a Library defined time-out/automatic logout after inactivity.

135.Q. Should saved searches and preferences be consistent across all systems?
135.A. No, the website will not save searches. In the Discovery Layer, saved searches should be configurable by the user.

136.Q. How frequently should catalog data be updated?
136.A. Catalog data are updated by staff daily, usually multiple times a day.

137.Q. If data updates fail, should the system show older data, hide items, or notify staff?
137.A. Staff should receive notifications of system failures.

138.Q. Should staff be alerted when updates fail?
138.A. Yes.

139.Q. Should staff dashboards differ based on user role?
139.A. TBD.

140.Q. Should staff have access to popular searches and no-result searches?
140.A. Yes.

141.Q. Should staff be able to update labels, text, and featured items without technical support?
141.A. This is negotiable.

142.Q. Should subjects, names, and categories actively guide search relevance and filtering?
142.A. This depend both on the type of search selected by the user and the search algorithm.

143.Q. Should community-focused or inclusive topics be easier to discover?
143.A. Negotiable.

144.Q. Should search results pull data from external systems or be stored locally?
144.A. Searches should be done on the data source selected (website, catalog/Discovery Layer).

145.Q. Are you open to using a dedicated or custom discovery and catalog technology alongside Drupal?
145.A. As stated in the RFP requirements for the Discovery Layer, the product should be an existing system that is sold and utilized in the U.S.

146.Q. For the website redesign, will the Library provide full access to the current Drupal CMS environment and hosting assets (themes, modules, SSL certificates), or should vendors assume a limited audit scope?
146.A. To be determined. At minimum vendors will be provided with full copies of all website content including static files and images, stylesheets and the Drupal database and configuration settings.

147.Q. Does the Library have a preferred CMS for the redesign (e.g., Drupal continuation, WordPress, or another platform), or should vendors recommend the most suitable solution based on accessibility, multilingual support, and scalability?
147.A. No, we expect the vendor to propose one.

148.Q. Regarding WCAG 2.2 compliance, are there specific accessibility audit tools or validation protocols (e.g., Siteimprove, WAVE, third-party certification) the Library

requires vendors to use?
148.A. To be determined. Vendor should recommend any tools they have successfully used for WCAG compliance and pricing if available.

149.Q. For multilingual support, will the Library provide finalized translations in Chinese and Spanish, or should vendors include translation services and workflows in their proposals?
149.A. Vendors should include translation services and workflows in proposals.

150.Q. In terms of metadata enrichment for the discovery layer (e.g., MARC 386, Homosaurus, Indigenous subject headings), does the Library expect vendors to configure these fields only, or also provide ongoing authority control and metadata curation services?
150.A. The vendor may need to provide the Library with support in configuring these fields depending on the functionality and capabilities of the proposed system.

151.Q. For integration with the CARL ILS and Communico events system, will the Library provide API documentation and sandbox access, or should vendors plan to conduct independent discovery and integration testing?
151.Q. The Library will provide the selected vendor with API documentation and access. Sandbox availability is currently unknown.

152.Q. Are federated search capabilities across subscription databases considered mandatory at launch, or optional features to be phased in during later stages?
152.A. Optional.

153.Q. What KPIs does the Library prioritize for measuring success (e.g., improved search success rate, increased catalog usage, accessibility audit scores, multilingual engagement metrics)?
153.A.
• Responsive Design Process: Designing with community members in mind
• Accessibility Compliance: Meeting or exceeding WCAG 2.2 standards
• Search Effectiveness: Google-like search results and relevance
• Unified Search: Single point of access for all resources including Link+
• Public Perception: Improvement in website and mobile satisfaction ratings
• Resource Discovery: Increased usage of online resources
• Event Integration: Successful search and display of relevant Communico events

154.Q. Is there a target budget ceiling for optional services (e.g., AI-driven recommendations, advanced analytics dashboards), or should vendors propose flexible pricing models for add-on features?
154.A. Vendor should propose flexible pricing models for add-on features.

155.Q. For project milestones, does the Library anticipate phased delivery (website first, discovery layer later), or a single integrated rollout within the six-month implementation window?
155.A. It will most likely to be a phased implementation, order of phases to be determined during

negotiations with selected vendor.

156.Q. For the website redesign, will the Library provide full access to the current Drupal CMS environment and hosting assets (themes, modules, SSL certificates), or should vendors assume a limited audit scope?
156.A. At minimum we will provide all files, data, Drupal database and configuration settings, stylesheets to the selected vendor. System level access to the existing site, hosted by a third party provider, is not likely.

157.Q. Does the Library have a preferred CMS for the redesign (e.g., Drupal continuation, WordPress, or another platform), or should vendors recommend the most suitable solution based on accessibility, multilingual support, and scalability?
157.A. We expect the vendor to propose a CMS.

158.Q. Regarding WCAG 2.2 compliance, are there specific accessibility audit tools or validation protocols (e.g., Siteimprove, WAVE, third party certification) the Library requires vendors to use?
158.A. We expect the vendor to use a variety of tools and methods to validate WCAG 2.2 compliance including automated tools such as WAVE, manual testing and use of accessibility software such as screen readers.

159.Q. For multilingual support, will the Library provide finalized translations in Chinese and Spanish, or should vendors include translation services and workflows in their proposals?
159.A. The vendor is expected to provide translation services and workflows.

160.Q. In terms of metadata enrichment for the discovery layer (e.g., MARC 386, Homosaurus, Indigenous subject headings), does the Library expect vendors to configure these fields only, or also provide ongoing authority control and metadata curation services?
160.A. Depending on the Discovery Layer system being proposed, we may need assistance configuring certain MARC tags and other display fields.

161.Q. For integration with the CARL ILS and Communico events system, will the Library provide API documentation and sandbox access, or should vendors plan to conduct independent discovery and integration testing?
161.A. The Library will provide API access to both systems. Availability of sandbox environments is TBD.

162.Q. Are federated search capabilities across subscription databases considered mandatory at launch, or optional features to be phased in during later stages?
162.A. See Part 2, section "1.2 Content Integration and Resource Discovery :Database Integration: Option to conduct federated searches across subscription databases and electronic resources.

163.Q. What KPIs does the Library prioritize for measuring success (e.g., improved search

success rate, increased catalog usage, accessibility audit scores, multilingual engagement metrics)?
163.A. For Part 1, Website, see section 4.1 and 4.2 for success metrics and KPIs. For Part 2, Discovery Layer, see section 6.

164.Q. Is there a target budget ceiling for optional services (e.g., AI driven recommendations, advanced analytics dashboards), or should vendors propose flexible pricing models for add on features?
164.A. There is no target budget.

165.Q. For project milestones, does the Library anticipate phased delivery (website first, discovery layer later), or a single integrated rollout within the six month implementation window?
165.A. We are open to either a phased roll out (e.g. Discovery Layer then Website) or integrated roll-out.

166.Q. Who are the users of the website and the CMS?
166.A. Users can be any anonymous public user as well as Library staff.

167.Q. How many user roles will be required for CMS access, including content review and approval workflows?
167.A. See question 64.

168.Q. Is there a preferred technology stack or CMS for the website, or should the vendor recommend one?
168.A. Vendor should propose.

169.Q. Do you want to re-design the existing website or develop it from scratch?
169.A. Complete redesign and from scratch are equivalent.

170.Q. Could you please confirm whether the website or CMS needs to integrate with any external systems, platforms, or applications, and provide a list of those integrations if applicable?
170.A. See question 25.

171.Q. Will the website include end-user sign-up/sign-in functionality, or will user access be managed entirely through the CMS?
171.A. The only users to sign in to the website will be staff, so login via the CMS.

172.Q. Is any payment integration required? If yes, what will it be used for?
172.A. While the Library does not charge late fines, there is still a charge for lost or unreturned materials. Current payment provider is Authorize.Net.

173.Q. Do you want a specific tool that can translate the website content into English, Chinese, and Spanish languages?

173.A. Vendor should propose translation tools/services.

174.Q. Approximately how much content needs to be migrated?
174.A. See question 50.

175.Q. What data is expected to be migrated as part of Part I?
175.A. All content in the current Drupal CMS including files and content stored in Drupal database.

176.Q. What is the purpose of the calendar and events feature, and who will use it?
176.A. The calendar lists events at the library and is an existing third-party tool provided by Communico.

177.Q. Should real-time chat be managed by staff or Chat Bot?
177.A. The Library is interested in exploring a chat feature that would allow users to chat with staff during designated service hours.

178.Q. Will the real-time chat be available 24/7, or only during specific hours?
178.A. Specific hours.

179.Q. How would you like AI capabilities to be used on the search & Assistance?
179.A. We are interested in exploring AI search capabilities.

180.Q. What usage statistics are required (e.g., sessions, searches, downloads, user engagement)?
180.A. All the standard information collected by Google Analytics.

181.Q. Do you have any preferred analytics or reporting tools to be used?
181.A. Google Analytics.

182.Q. What ecommerce provider does Berkeley Public Library currently use?
182.A. Authorize.Net.

183.Q. How many bibliographic records are in your CARL ILS, including the records for the Tool Library?
183.A.

Physical materials: 300,932 includes on order titles
Electronic materials: 311,239
Tools: 955

184.Q. Can you provide a few examples of the data that you are adding to the MARC 386 fields?
184.A. Examples of 386 (Creator Characteristics):

Authors:

Amiri Baraka
‡a African Americans ‡aWriters‡2lcdgt

Maxine Hong Kingston
‡aAsian Americans‡aWriters‡2lcdgt

Illustrators:

Grace Lin
‡aAsian Americans‡aIllustrators‡2lcdgt

Current implementation: We are currently utilizing subfields $a (demographic group term) and $2 (source of term) for writers and illustrators.

Future plans: We plan to expand our use of the 386 tag to include additional subfields and cover other creator roles beyond writers and illustrators.

185.Q. Are you open to a Canadian agency that has done similar work with clients across the United States, with some currently being the States of California, Colorado and Wyoming?
185.A. All submissions will be reviewed and evaluated.

186.Q. Would you need any copywriting or content migration services?
186.A. No copywriting. Content migration is a requirement.

187.Q. Would you need any original or stock videography or photography?
187.A. TBD.

188.Q. Would you require hosting, dns or ssl services?
188.A. Hosted DNS is desirable as is vendor installation of SSL certificates provided by the Library.

189.Q. Is there a DAM currently integrated with the website?
189.A. No.

190.Q. Is there a preference for an open source Discovery layer product?
190. No.

191.Q. The RFP title notes that this is a re-issue. When was the original RFP and what was the outcome that led to this reissue?
191.A. The original RFP was issued in September 2025. The RFP was re-issued to include a requirement that was inadvertently not included in the originally posted RFP and the adjustment of the evaluation criteria. The re-issued RFP included the criterion in Part 2, Discovery Layer, section 8.1: "Library Industry Tested Product: Discovery layer being proposed has been tested in the Library industry and is in use by libraries in the United States."

192.Q. What third-party tools, if any, are used to manage accessibility?
192.A. None at the moment.

193.Q. Where is the site currently hosted?
193.A. In the cloud by Sevaa.com.

194.Q. Please provide average monthly and peak page views over the last year.
194.Q. See question 100.

195.Q. What are the data storage requirements (files, database, etc) for the site?
195.A. See question 50.

196.Q. Do you currently have a CDN and/or a WAF in place in your hosting infrastructure?
196.A. No.

197.Q. Can you quantify the content in the Drupal site (#nodes, pages, files, etc.)
197.A. Not at this time.

Except as provided herein all other terms and conditions remain unchanged.