



Vancouver Island Regional Library

Request for Proposal #1015-2013

INTEGRATED LIBRARY SYSTEM (ILS)

Issue Date: January 6th, 2014

Closing Date: 14:00:00 local time, March 6, 2014

1.0. GENERAL INFORMATION

1.1. Introduction

Vancouver Island Regional Library invites proposals through this Request for Proposal (“RFP”) for the supply and, maintenance of a new Integrated Library System (“ILS”). VIRL is currently using Horizon from SirsiDynix. VIRL is interested in finding an ILS which provides patrons with robust, seamless access to a variety of online resources, as well as enabling the Library to monitor and improve stewardship of library resources.

VIRL is looking for an ILS vendor which can support and enhance our efforts to provide stable, innovative and comprehensive customer services.

The Proposals should reflect initial costs as well as maintenance costs over a Five (5) year term. VIRL’s Requirements for the ILS including the scope of work is attached as “Appendix 1” to this RFP.

1.2. Limitation of Request for Proposal

This is a request for proposals and is not a tender call. Refer to Section 3.5 for further details.

1.3. Overview

Vancouver Island Regional Library (VIRL) is the fourth largest library system in British Columbia. We have approximately 370 employees and serve over 430,000 people on Vancouver Island, Haida Gwaii, and Bella Coola on the Central Coast through 38 (soon to be 39) branch libraries, an eLibrary at virl.bc.ca and a Books by Mail service. The Library maintains a centralized processing department to receive and distribute our floating and fixed collections.

Library Branches: VIRL is comprised of 38 branch libraries that regionally cover approximately 63,000 sq. km., including eight islands 450km apart at the farthest distance.

VIRL branches are described as either large (urban) or small (rural), based on the communities they serve.

Large/Urban branches:

Sooke	South Cowichan	Parksville	Campbell River
Sidney/North Saanich	Port Alberni	Courtenay	Comox
Cowichan	Ladysmith	Qualicum Beach	Nanaimo – North
Nanaimo – Harbourfront	Nanaimo – Wellington		

Small/Rural branches:

Union Bay	Tofino	Port Hardy	Bowser
Cumberland	Ucluelet	Chemainus	Horby Island
Port McNeill	Masset	Queen Charlotte	Sayward
Gold River	Cortes Island	Port Alice	Woss
Sointula	Cowichan Lake	Gabriola Island	Sandspit
Quadra Island	Bella Coola	Tahsis	Port Renfrew
Port Clements			

1.3.1. Library Information

Bibliographic records	261,372
Items records	904,702
Serials records	900
Patrons	156,724
Total annual circulation	5,019,367
Staff clients	250
OPAC workstations	240
Self-checkout stations	27

1.3.2. Current Software System and Culture

VIRL currently uses SirsiDynix's Horizon Integrated Library System (ILS). Since 2006 we have used the following modules:

- Acquisitions
- Cataloguing
- Circulation
- StaffPAC

- Serials
- Offline Circulation
- OPAC
- Web Reporting Tool (with Report Scheduler)

In addition to the above modules, VIRL uses several third-party software programs to fulfill all the capabilities it requires from an ILS. VIRL's strategic priorities require a new-generation ILS. This ILS must allow VIRL to create more efficient workflows, provide tools for enhanced collection management, and offer effective ways to promote and distribute library resources.

A complete list of VIRL's required Core Modules and Functionality Checklist is listed in Appendix 1.

1.3.3. Connectivity

All VIRL Branches have independent connections to the Internet. All of VIRL Corporate resources and servers are located at the Nanaimo North Administration facility. Branches are connected to these resources by way of VPN links over the Internet. Each of the VIRL branches is connected to the Internet as follows:

Location	Connectivity
Nanaimo North Administration	50 Mbps
Nanaimo North Library	30 Mbps
Bella Coola	3 Mbps
Books by mail	N/A
Bowser	30 Mbps
Campbell River	30 Mbps
Chemainus	30 Mbps
Courtenay	30 Mbps
Cortes Island	3 Mbps
Cowichan	30 Mbps
Cowichan Lake	30 Mbps
Cumberland	30 Mbps
Gabriola Island	30 Mbps

Gold River	3 Mbps
Hornby Island	3 Mbps
Ladysmith	30 Mbps
Masset	3 Mbps
Nanaimo Harbourfront	30 Mbps
Nanaimo Wellington	30 Mbps
Parksville	30 Mbps
Port Alberni	30 Mbps
Port Alice	3 Mbps
Port Clements	3 Mbps
Port Hardy	3Mbps
Port McNeil	3 Mbps
Port Renfrew	3 Mbps
Quadra Island	3 Mbps
Qualicum Beach	30 Mbps
Queen Charlotte	3 Mbps
Sandspit	3 Mbps
Sayward	3 Mbps
Sidney/North Sannich	30 Mbps
Sointula	3 Mbps
Sooke	30 Mbps
South Cowichan	30 Mbps
Tahsis	3 Mbps
Tofino	3 Mbps

Ucluelet	3 Mbps
Union Bay	30 Mbps
Woss	3 Mbps

1.4. Timetable

The proposed timetable for this RFP is as follows, however, the Library reserves the right to modify the process and schedule as events warrant:

Action	Date
Issue Date of RFP	January 6th, 2014
Proposal Due Date	March 6th
Library review of RFP documents	March – April
Vendors shortlisted for presentations	May (Vendors contacted after Board Executive meeting)
Vendors prepare for presentation	Mid May - June
Vendor presentations	July
If required, Vendor call-back presentation	August
Final selection	August
Budget approvals	September
Contract negotiations	October
Intended migration and implementation	March 1, 2015

2.0. DEFINITIONS

The following words and phrases used in this RFP and Schedules and any Addenda have the meanings set forth below:

Addendum or Addenda: changes to this RFP communicated pursuant to this RFP

Agreement: an agreement or agreements between the Library and the Contractor for the work required by the Contractor identified in this RFP and all attached Schedules. Any agreement entered into by the Library and the Preferred Proponent will be as negotiated between the two parties.

Branch or Branches: the locations within the VIRL from which the successful Proponent may be required to provide all work identified in this RFP including those Branches identified in Part 1.3 of this RFP.

Closing Addresses: 4390 Boban Drive, Nanaimo, British Columbia

Closing Time: 2:00 PM Pacific Standard Time, March 6, 2014

Contractor: the Proponent who enters into an Agreement pursuant to this RFP

Evaluation Committee: a committee of Library personnel and, at the Library's discretion, one or more consultants, who will evaluate the Proposals

Evaluation Criteria: the criteria for evaluation of the Proposals set out in Section 5

Integrated Library System or ILS: the integrated library software system that meets the Library's Requirements

Library or VIRL: the Vancouver Island Regional Library ("VIRL")

Library's Requirements : the requirements of the Library set out in Appendix 1 which should be included in a proposal

Library Representative: the Library's contact person described at Section 3.1

Preferred Proponent: the Proponent, if any, selected by the Library to negotiate an Agreement

Proponent: any legal entity, including a person, company firm or consortium, which submits a Proposal

Proponent Member: where a Proponent consists of two or more legal entities, each of such entities

Proposal: a Proponent's submission pursuant to this RFP

RFP: this Request for Proposals

3.0. INSTRUCTIONS TO PROPONENTS

3.1. Library Representative

The only authorized contact person for the Library on behalf of this RFP is:

Elisa Balderson, Purchaser
Vancouver Island Regional Library
4390 Boban Drive,
Nanaimo, BC V9T 5V9
Email: ebalderson@virl.bc.ca

3.2. Errors and Omissions

While the Library has used considerable effort to ensure an accurate representation of information in this RFP, the information is solely a guideline for proponents. The Library does not guarantee or warrant the information to be accurate, comprehensive or exhaustive, and the Library shall not be held liable for any errors or omissions in this document. Nothing in this RFP is intended to relieve Proponents, at their own expense, from forming their own opinions and conclusions with respect to matters addressed in this RFP.

3.3. Clarifications

All questions and requests for clarification relating to the Request for Proposal process and/or identification of any errors or omissions in the Request for Proposal documents should be directed to the Library Representative.

Information about this RFP from any other source is not official and should not be relied on. Enquiries and responses may be recorded and may, at the Library's discretion, be retained in confidence or distributed to all other Proponents.

3.4. Addenda

The Library Representative may change, amend or correct this RFP by issuing an Addendum. Addenda will be posted on the BCBid website (www.bcbid.gov.bc.ca). A Proponent is solely responsible to ensure that it has received a complete RFP as listed in the Table of Contents and a copy of any Addenda. Submission of a Proposal constitutes a representation by a Proponent that it has verified receipt of a complete RFP including any Addenda. Each Proposal will be deemed to be made on the basis of the entire RFP and any Addenda.

3.5. RFP is not a Tender

This is a request for proposals and is not a tender call. This RFP is an invitation to treat. It is not an offer. The Library does not intend for this RFP to create any obligations between the Library and any Proponent and no contractual, tort or other legal obligation of any kind is created or imposed on the Library by this RFP or by the submission of any proposal or by consideration of, or failure or refusal to consider, any proposal by the Library. No contractual or other legal obligations will be created between the Library and any Proponent until and unless a written contract is executed between the Library and a Proponent for the development of the ILS. Without limiting the foregoing, the use of mandatory or prescriptive language in this RFP in relation to future acts of the Library is intended only to describe the Library's present intention, is not intended to express contractual intention, and if relied upon by a Proponent is relied upon at that Proponent's own risk. If there is anything in this RFP that is inconsistent with this paragraph, this paragraph prevails.

The Vancouver Island Regional Library is under no obligation to award any Contract(s) as a result of this RFP and reserves the right to cancel the RFP process at any time.

3.6. Additional information and/or interviews

VIRL may, at their sole discretion, invite some or all of the Respondents to meet with VIRL to perform a scripted demonstration of their product either at the VIRL offices in Nanaimo, BC or live via the web. Please indicate your ability to provide such presentations.

3.7. Contractor's Responsibility

The Contractor will, except to the extent otherwise specified in the Agreement, be responsible for all aspects of the ILS and for acquiring all necessary operating, authorizations and licences, for compliance with all applicable laws and jurisdictions. Depending upon the particular Proposal, some or all of these functions may be specified under the Agreement.

3.8. Proponents' Investigations

Any party responding to this RFP is solely responsible for investigating and satisfying itself on every aspect of the ILS, including without limitation, branch conditions, environmental matters, servicing requirements and design feasibility and requirements. By submitting a Proposal a Proponent will be deemed to have satisfied itself on all such matters.

3.9. Enquiries

All inquiries related to this RFP should be directed in writing to the person named below (the "Library Representative"). Information obtained from any person or source other than the Library Representative may not be relied upon.

Name: Elisa Balderson
Purchasing Manager

at the following location:

Address:
Vancouver Island Regional Library,
Box 3333 / 4390 Boban Drive
Nanaimo, BC. V9T 5V9

Fax: 250-729-2334

E-mail: ebalderson@virl.bc.ca

Reference No.: RFP 1015- 2013 Integrated Library System (ILS)

Inquiries should be made no later than 7 business days before Closing Time. The Library reserves the right not to respond to inquiries made within 7 business days of the Closing Time. Inquiries and responses will be recorded and may be distributed to all Proponents at the discretion of the Library.

Proponents finding discrepancies or omissions in the Contract or RFP, or having doubts as to the meaning or intent of any provision, should immediately notify the Library Representative. If the Library determines that an amendment is required to this RFP, the Library Representative will issue an addendum in accordance with section 2.7. No oral conversation will affect or modify the terms of this RFP or may be relied upon by any Proponent..

3.10. Access to VIRL Facilities

Upon notifying the Library Representative of a time which they will access a Facility, a Proponent may complete a visit to any Facility for the purposes of inspection and investigation of the Facility, but may not otherwise disturb Facility operations.

Any access by a Proponent, or any person authorized by it, is at the Proponent's and that person's sole cost and risk. By such access the Proponent agrees to indemnify the Library from any liability suffered or incurred by either or both of them as a result of such access. Any access not in accordance with the foregoing will be unauthorized.

3.11. Proponents' Costs

Any Proponent, or other party responding to this RFP is solely responsible for its own expenses and bears the sole risk and liability for any expense, damage, loss or liability incurred by it, including loss of opportunity and loss of profits or potential profits, in connection with its consideration of, or response, or both, to this RFP.

3.12. No Liability of Library

Except as expressly and specifically acknowledged in these Instructions to Proponents, the Library will not be responsible for any liabilities, costs, expenses, loss or damage incurred, sustained or suffered by Proponents by reason of their participation in this RFP, the consideration or non-consideration by the Library of any Proposal, or for any other reason related to this RFP, or any process related to this RFP, whether for costs, expenses, losses, damages, loss of anticipated profits or any other matter. The receipt by the Library of any information (including any submissions, ideas, plans, drawings, models, or other materials communicated or exhibited by any intended Proponent, or on its behalf) shall not impose any obligations on the Library and shall not confer any rights on the Proponent.

3.13. Waiver of Proponent's Rights

No Proponent shall have any claim for any compensation of any kind whatsoever as a result of participating in this RFP and by submitting a Proposal each Proponent shall be deemed to have agreed that it has no claim.

By submitting a Proposal, the Proponent acknowledges the Library's rights under this RFP and absolutely waives any right, or cause of action against the Library, its officers, directors, employees or agents by reason of the Library's failure to accept the Proposal submitted by the Proponent, whether such right or cause of action arises in contract, negligence, bad faith or otherwise.

3.14. Good Business Clause

Contractors, consultants, and suppliers wishing to do business with the Library agree to resolve any differences through the Library's dispute resolution procedure. Contractors, consultants, and suppliers who choose to use a public forum to air any differences may be prevented from doing future business with the Library.

3.15. Freedom of Information and Protection of Privacy

The Library is subject to the provisions of the Freedom of Information and Protection of Privacy Act. As a result, while the Act offers some protection for third party business interest, the Library cannot guarantee that any information provided to the Library can be held in confidence. All Proposals, including any related documents, submitted to the Library, become the property of the Library. They will be received and held by the Library, subject to the provisions of the Freedom of Information and Protect of Privacy Act.

In accord with section 30.1 of the Freedom of Information and Protection of Privacy Act, the Library as a public body must ensure that personal information in its custody and control is stored only in Canada and accessed only in Canada. This means that Proponents must explain how migration and installation services will be provided so as to be compliant with this Act.

3.16. Confidentiality of Information

All Proponents and any other person who through this RFP process gains access to confidential financial information of the Library are required to keep strictly confidential all information which in any way reveals confidential business, financial or investment details, programs, strategies or plans, learned through this RFP process. This requirement will continue with respect to such information learned by the successful proponent, if any, over the course of any Agreement which may arise out of this RFP process. Information pertaining to the Library obtained by any Proponent as a result of participation in this process is confidential and must not be disclosed without written authorization from the Library.

3.17. Insurance

The successful Proponent will be required to provide workplace insurance and maintain at their own expense public liability, property damage and compensation liability insurance coverage in the amount of not less than \$2,000,000 per occurrence. This policy is to include the Vancouver Island Regional Library as an additional insured.

3.18. Governing Law

The laws of the Province of British Columbia shall apply to this document and the Courts of British Columbia shall have exclusive jurisdiction over any agreement formed as a result of this RFP. All Proponents shall comply with any law, including all legislation and regulations which may be applicable to the services provided subsequent to this document.

4.0. CONTENT OF PROPOSALS

Proposals should address all requirements in this Section 4.

4.1. Basic Elements

4.1.1. One Original and Eleven paper copies and one electronic copy of the Proposal on a USB drive. These must be submitted to the Library at the Closing Addresses no later than the Closing Time, in a sealed box or envelope. All responses to Schedules A – D should be provided in .xls or .xlsx format.

4.1.2. It is the responsibility of each Proponent to ensure that their Proposal is received at the Closing Addresses prior to the Closing Time. Any Proposals not delivered as stated above will not be accepted and shall be returned to the sender with no further consideration given. The Library is not responsible for the timeliness of documents delivered to any other address.

4.1.3. Both the paper and electronic copies must be clearly marked "RFP No. 1015-2013 - Integrated Library System"

4.1.4. Proposals should be accompanied by one transmittal letter specifying the Proponent's name, address and contact person.

4.1.5. Fax copies of Proposals will not be considered unless specifically requested by the Library.

4.1.6. Proposals received after the Closing Time will not be considered and will be returned unopened.

4.1.7. Proponents should provide all information requested in the Schedules and Appendices attached to this RFP. Proposals should be submitted in a format which cross-references the specific section of this RFP (including all Schedules and Appendices) with the information provided by the Proponent.

4.1.8. All items in the Proposal that are not in full compliance, or that vary from the specific RFP requirements, should be clearly identified in the Proposal as non-compliant and/or variances, and shall include specific reference to the precise nature of the variances or non-compliance.

4.2. Pricing

4.2.1. Pricing should be in accordance with the form of costing table set out in Schedule "B" with such modifications as the Proponent deems necessary to meet the requirements of this RFP.

4.2.2. Proposals should provide a comprehensive breakdown of all modules/functions, add-ons, software licenses, user memberships, documentation updates, subscriptions, upgrades/updates/uplifts and services necessary for a functioning ILS. The Proponent should describe and quote components as individual and separate items, as well as include any annual costs. The Proponent should provide a comprehensive cost breakdown for implementation, customization, training and data migration (to include bibliographic, item, patron and circulation transactions).

4.2.3. Any upgrade to the base system needed for optional components must be included in the cost of any optional components.

4.2.4. Prices for the initial purchase, implementation and 5 years of maintenance should be included for each item.

4.2.5. The VIRL will entertain "Value-added" pricing proposals, and any other creative costing as provided by the proponent.

4.2.6. Proposals should indicate the period of time for which the Proposal prices are guaranteed. It is the Library's preference to have price guarantees to March 31, 2015.

4.2.7. Proposals do not need to include pricing for any system hardware as the Library will purchase such hardware independently. The Proponent should, however, provide specifications and recommendations for hardware purchase and configuration.

4.2.8. The Proponent may assume that the Library will provide all power, cabling, air conditioning, furniture and other branch features.

4.3. Proponent Identification

Proposals should clearly identify the Proponent and whether it is an individual, a corporation, a partnership or a consortium, including the legal entity which will execute an Agreement. If the Proposal is from a consortium or partnership, information should be provided for all Proponent members including their legal and financial

relationship with each other. The contact entity and representative for dealings with the Library should also be specified.

4.4. Authorizations

Proposals should name and be signed by an authorized signatory of the Proponent. If the Proponent is a consortium or partnership, one individual and one entity should be designated as the contact authorized to deal on behalf of the consortium or partnership. By submitting a Proposal a Proponent is deemed to:

4.4.1. be authorized to make the offer in the Proposal; and

4.4.2. confirm that neither the Proponent nor any Proponent Member has any interest in the Proposal of any other Proponent, directly or indirectly, and that it has not entered into any agreement that could create such an interest.

4.5. Conflicts Disclosure

Proponents, including all Proponent Members, should disclose any actual, perceived or potential conflicts of interest and existing business relationships they may have with the Library.

4.6. Financial Capability

Proposals should provide a summary of how the Proponent intends to finance the implementation of the ILS. They should provide evidence of the Proponent's financial capability to complete the Agreement. Where the Proponent is a consortium, such evidence should be provided for each Proponent member. Such evidence may include financial statements and a letter from a Canadian financial institution commenting on the Proponent's financial capability to meet its obligations under the Agreement contemplated in the Proposal. A Proponent should provide the appropriate names and addresses and contact details of persons who can comment on the Proponent's financial capability, and the authority for the Library to speak with such persons. The Library reserves the right to require guarantees or other financial security as part of the Agreement, where in the Library's opinion it is warranted.

4.7. Demonstrated Experience

Proposals should demonstrate that the Proponent has the background, skills and experience to successfully complete the ILS. A Proponent should provide the appropriate names and addresses and contact details of persons who can comment on the Proponent's development experience, and the authority for the Library to speak with them.

4.8. Preliminary Specifications

A proposal should include specifications necessary to meet the Library’s Requirements, and which demonstrate the Proponent’s understanding of key issues faced in the ILS.

5.0. EVALUATION PROCESS AND CRITERIA

5.1. Evaluation Criteria

The Library, in its sole discretion, may evaluate proposals based on the Library’s determination of what provides the best value and overall benefit to the Library. A best value analysis format for evaluation will be used for evaluating Financial, Technical and Deliverable components as follows:

Categories
<p>1. Financial evaluation, including but not limited to:</p> <ul style="list-style-type: none"> a. Overall pricing b. Ongoing costs <ul style="list-style-type: none"> i. Maintenance fees (5 year projection) ii. Additional staffing required iii. Support iv. Installation of enhancements c. Proponents financial ability
<p>2. Technical evaluation, including but not limited to:</p> <ul style="list-style-type: none"> a. Qualifications and experience <ul style="list-style-type: none"> i. Strength of Proponent’s qualifications ii. Strength of Proponent’s experience in requirements of this process iii. Strength of overall methodology including work plan iv. Relevance of references provided
<p>Deliverables</p> <ul style="list-style-type: none"> a. Ability to meet stated requirements, including but not limited to: <ul style="list-style-type: none"> 1. Functionality 2. Platform suitability 3. System reliability 4. 3rd party product support 5. Ease of use 6. Ease of administration 7. Customer support metrics 8. Capacity for system expansion b. Ability to meet required timing

To the extent the Library deems appropriate, the following criteria may also be taken into consideration in the Library evaluation of the Proposals and may be weighted to one or more of the above categories at the Library's discretion:

- 5.1.1. anticipated cost of computer hardware, network infrastructure, and I.T. Staffing involvement;
- 5.1.2. relevant expertise and track record for similar ILSs;
- 5.1.3. experience of subcontractors (if any) to be used by the Contractor in the ILS;
- 5.1.4. any social benefits that may accrue to the Library or its citizens and member municipalities;
- 5.1.5. environmental stewardship and "Green" opportunities that may be available;
- 5.1.6. any conditions that are required to be fulfilled prior to the Proponent's full implementation of the ILS, including the possible duration of those conditions, and the likelihood of such conditions being satisfied. This may include an assessment of the Proponent's ability to satisfy such conditions;
- 5.1.7. the Proponent's financial capacity to perform its obligations with respect to the ILS in accordance with its Proposal;
- 5.1.8. the ability of a Proponent to meet the Library's Requirements;
- 5.1.9. the risks, if any, imposed on the Library by the Proposal;

The Library may in its sole and unfettered discretion, negotiate and enter into an Agreement with a Proponent whose Proposal does not offer the lowest total cost for the ILS, but which in the sole and unfettered determination of the Library offers better benefit. The decision of the Library in all matters relating to the evaluation of a Proposal will be final.

5.2. Processing of Proposals

Subject to further discretion provided to the Library in this RFP, the following sets forth in summary form the procedures for processing Proposals:

VIRL reserves the right to open all Proposals in a manner and at the time and place determined by VIRL. Proposals will NOT be opened in Public.;

- 5.2.1. Proposals received after the Closing Time will not be considered and will be returned unopened;
- 5.2.2. Proposals will be reviewed in comparison to the requirements of the RFP, including scoring based on the above categories;
- 5.2.3. The Library may elect not to consider Proposals that do not meet the requirements of this RFP;
- 5.2.4. The Library may request one or more Proponents to provide written clarification of their Proposal or supplementary information;

5.2.5. The Library may request one or more Proponents to attend a personal or conference call interview for clarification of their Proposal but the Library is not required to have such a meeting or call with any or all of the Proponents; and

5.2.6. Once the Library selects a Preferred Proponent, they will attempt to negotiate an Agreement with that Preferred Proponent.

5.3. Evaluation Committee

Proposals will be reviewed by the Evaluation Committee who will report to the Library from time to time as required. Any decision on selection of a Preferred Proponent, approval of an Agreement, discontinuance of the RFP or otherwise may be made by the Library in their sole discretion.

Upon completion of Proposal evaluation, the salient features of each Proposal and the recommended Proposal may be summarized and reported on to the Board.

5.4. Board of Director Approval

The Proponent(s) acknowledge that funding for the RFP and award of the Contract is subject to VIRL Board of Directors approval.

5.5. Negotiation with Preferred Proponent

5.5.1. The Library will select the Preferred Proponent after evaluation of the Proposals and may identify one or more backup Proponents. Written notification of the selection of the Preferred Proponent will be provided to Preferred Proponent.

5.5.2. During negotiations with the Preferred Proponent the scope of work may be refined, price negotiated, responsibilities delineated, implementation issues clarified, and the final terms and conditions of any contract determined.

5.5.3. The Library expects to enter into an Agreement for the ILS within 28 days of advising a Proponent that it has been selected as the Preferred Proponent. The Library may in its sole discretion discontinue negotiations with the Preferred Proponent if negotiations with that Proponent reach an impasse or if the Library determines that it is unlikely that a satisfactory Agreement for the ILS will be entered into within the 28 days or such other period acceptable to the Library and thereafter the Library may enter into negotiations with one or more backup Proponents.

5.5.4. During negotiations with the Preferred Proponent, the Preferred Proponent should provide the following information to the Library prior to the execution of the Agreement:

5.5.4.1. a copy of the Preferred Proponent's current WorkSafeBC Clearance Letter;

5.5.4.2. a copy of the Preferred Proponent's business licence if operating within the boundaries of a Local Government;

- 5.5.4.3. a copy of the Preferred Proponent's insurance acceptable to the Library; and
- 5.5.4.4. an up-to-date copy of the Preferred Proponent's Occupational Health and Safety Program acceptable to the Library.

6.0. LIBRARY DISCRETION

6.1. Proposal Approval

VIRL is not obligated to award any contract pursuant to this RFP and may terminate this RFP at any time. The award of any contract pursuant to this RFP is subject to the following:

- (a) VIRL securing sufficient funding, as determined by the Library in its sole and absolute discretion; and
- (b) Funding approval of the successful proposal by the Vancouver Island Regional Library Board.

6.2. Library Discretion

In addition to any other discretion set forth in this RFP, the Library reserves the right, without limitation, in its sole and unfettered discretion, to:

- 6.2.1. not consider any Proposal from a Proponent who appears not to have the requisite experience or financial capability;
- 6.2.2. contact for reference purposes any party to verify the Proponent's financial capability or relevant expertise or other information contained in its Proposal;
- 6.2.3. not consider any Proposal that lacks required information or is otherwise incomplete;
- 6.2.4. accept items in a Proposal that are non-compliant or in variance with the specific RFP requirements;
- 6.2.5. require clarification or additional information where a Proposal is unclear, or allow rectification of defects;
- 6.2.6. not consider any Proposal without discussion with the Proponent;
- 6.2.7. not consider any Proposal that in the Library's opinion does not warrant detailed evaluation or is not in the best interests of the Library;
- 6.2.8. select the Preferred Proponent and any backup Proponents and communicate with them;
- 6.2.9. negotiate with the Preferred Proponent or any backup Proponents on any matter including Price and at any time;
- 6.2.10. raise new issues in negotiation that were not mentioned in the RFP or in a Proposal;

6.2.11. not consider the lowest total cost Proposal, even though financial cost is an important criteria, if, for example, a combination of other factors makes another Proposal more attractive;

6.2.12. discontinue negotiations with the Preferred Proponent or any backup Proponent at any time if the Library concludes that it is unlikely that an Agreement for the ILS will be entered into within 28 days of the selection of the Preferred Proponent or such other period acceptable to the Library, or that such Proponent is not working diligently to achieve an Agreement or otherwise;

6.2.13. not consider any or all Proposals without any obligation or any compensation or reimbursement to the Proponents, and the Library is under no obligation to select a Proponent. This may occur because no Proponent has submitted a Proposal on acceptable terms, including price, or for any other reason;

6.2.14. extend, abridge, modify or discontinue the process contemplated by this RFP;

6.2.15. determine, at any time, to withdraw some or all of the Library's Requirements from the process described in this RFP; and

6.2.16. discontinue this RFP for any reason whatsoever.

Schedule A

1. Proponent Information

2. Business profile

3. Describe your Business, including its history, origin and any affiliation to other corporate entities.
4. Provide the Library's' and/or principal officers' names, length of time in the library automation field, and any other pertinent information.
5. Describe the staff of the company in terms of FTEs and their percentage breakdown of FTE staff among sales, research and development, support, and other functions. If the company is currently for sale or involved in any transactions to expand or to be acquired by another organization, please explain.
6. Describe the business' involvement with library-related organizations and standards organizations (e.g. cataloguing, data exchange, programming).
7. Describe the company's strategy for keeping up with industry trends and developments in library software and systems.
8. Describe the procedure for developing new features, including how customer input is taken, evaluated, and weighted.

9. Strategic Partnerships/Test Sites

1. List any partnerships with third-party vendors, including a brief description of the services they provide.
2. Describe any partnerships with public libraries for developing new products or testing software.

10. Financial Data

1. Please provide financial data information sufficient to include the proponent's financial stability.

11. Company Contacts

1. Provide a list of the organizational officers directly involved in the product being proposed. Identify the number and location of sales and support personnel accessible to the purchaser.

12. User Groups

1. Provide the contact information for user groups, including website or listserv addresses. Provide the URL for any website that provides information on the company, press releases, and product information that is relevant to this proposal.
2. Is the user group member listserv open and available to the public?

Customer References

Please provide 3 references that are related to libraries similar in size to our library and, if possible, have migrated from the Horizon software program:

Reference 1	
Name:	
Title:	
Library:	
Telephone:	
E-mail:	
Web address:	
Date of Install:	
Reference 2	
Name:	
Title:	
Library:	
Telephone:	
E-mail:	
Web address:	
Date of Install:	
Reference 3	
Name:	
Title:	
Library:	
Telephone:	
E-mail:	
Web address:	
Date of Install:	

Schedule “B”

Costing Table					
Description	Initial/ Implementation	Year 1 Maintenance	Year 2 Maintenance	Year 3 Maintenance	5 Year Total Maintenance
Systems Administration Module					
Test database (copy of entire database)					
APIs					
Circulation Module					
Offline Circulation Module					
Mobile Circulation Module					
Automated Notification: Telephone (Dial in : 2 lines)					
Automated Notification: Telephone (Dial out : 3 lines)					
Automated Notification: SMS					
Automated Notification: Email (Includes Pre-Notification, Overdue, Holds Pickup)					
Cataloguing Module					
Acquisitions Module					
Serials Module					
StaffPAC					
OPAC					
Mobile PAC					
Web 2.0 Integrated Enriched Content add-on modules or features					

Costing Table (continued)					
Description	Initial/ Implementation	Year 1 Maintenance	Year 2 Maintenance	Year 3 Maintenance	5 Year Total Maintenance
Web 2.0 Discovery Layer OPAC (if distinct from another OPAC)					
OPAC Enhanced Record Content (Syndetics or other)					
Electronic Resource Management Module/Service					
Integrated e-vendor partner connections - cost per connection (eg. EBSCO, Overdrive, Recorded Books)					
Reports Module					
Outreach Module					
Simultaneous seat licenses (per 50 seats)					
SIP/SIP2/NCIP licenses /setup					
Data Migration Services					
Training					
Customization					
Project Management Costs					
System and Training Documents					
SUB TOTALS					
Additional options:					
Authority control processing or update services					
Children's PAC					
eCommerce setup for Public (in OPAC)					

Inventory Module					
InterLibrary loan module (ILL)					
TOTALS					

Appendix 1: ILS Functionality Checklist

INSTRUCTIONS:

Complete the following Proposed ILS System checklist electronically so you may add as much comment space as you require. Each RFP submission should include a completed Appendix 1 in paper and electronic format.

Label	Meaning	Definition
A	Available	Vendor currently supplies this capability as a part of the general software release. The price is included in the basic system.
O	Optional Addition	Vendor currently supplies this capability as a part of the general software release. This is an added cost item. Please give cost information.
IT	In Testing	Capability is scheduled for commercial release (not beta) within 6 months from the due date of this RFP. Development work is completed and testing is underway. Indicate the expected date for general release for our platform.
ID	In development	Testing and release planned within 2 years from the due date of this RFP. Indicate the expected date for general release for our platform.
NA	Not available	Not planned and not under development.
	Comments	Additional comments from the vendor.

For any specifications in the following checklist to which the Vendor answers other than A (Available), the Vendor **must** describe:

- 1) The feature, function, product, or service being planned or developed, indicating the date the function and feature will be available in general release and operation in the system proposed to the Library;
- 2) Any added cost for the feature, function, product, or service once it becomes available, either as a direct cost or because the feature, function, product, or service will require replacement of or addition to hardware or software originally proposed for initial installation;
- 3) If the feature, function, product, or service is not available, in development or planned, an explanation of how the specification might otherwise be met using alternative features, functions, products, or services available from the Vendor or a third party partner, including availability dates and any added costs, either direct or indirect.

Please complete the attached Appendix 1 – Excel Spreadsheet.

It is understood that proponents will not alter the attached Appendix 1 Spreadsheet in any way . Proponents are required to complete the information requested.