



Request for Proposals Public Library Statistics Collection and Reporting System

Ministry of Education – Libraries Branch

RFP Number: 7952 Issue date: September 21, 2016

Closing Time: Proposals must be received before 2:00 PM PDT on October 11, 2016

DELIVERY OF PROPOSALS:

Proposals must be in English and must be submitted using one of the submission methods below, and must either (1) include a copy of this cover page that is signed by an authorized representative of the Proponent or (2) otherwise identify the RFP, identify the Proponent and include the signature of an authorized representative of the Proponent that confirms the Proponent's intent to be bound.

Hard Copy Submission: Proponents may submit three hard-copies and one electronic copy, (preferably on a USB device) of its proposal. Proposals submitted by hard copy must be submitted by hand or courier to

Libraries Branch
Ministry of Education
620 Superior Street
Victoria BC V8W 9T1
Attention: Allan Carlson

OR

Email Submission: Proponents may submit an electronic proposal by email. Proposals submitted by email must be submitted to allan.carlson@gov.bc.ca in accordance with the instructions at Section 2.3 of this RFP.

Regardless of submission method, proposals must be received before Closing Time to be considered.

A proposal is deemed to incorporate the Confirmation of Proponent's Intent to Be Bound below, without alteration.

CONFIRMATION OF PROPONENT'S INTENT TO BE BOUND:

The enclosed proposal is submitted in response to the referenced Request for Proposals, including any Addenda. By submitting a proposal, the Proponent agrees to all of the terms and conditions of the RFP including the following:

- a) The Proponent has carefully read and examined the entire Request for Proposals;
- b) The Proponent has conducted such other investigations as were prudent and reasonable in preparing the proposal; and
- c) The Proponent agrees to be bound by the statements and representations made in its proposal.

PROPONENT NAME (please print): _____

NAME OF AUTHORIZED REPRESENTATIVE (please print): _____

SIGNATURE OF AUTHORIZED REPRESENTATIVE: _____

DATE: _____

RFP No. 7952 Public Library Statistics Collection and Reporting System

GOVERNMENT CONTACT:

Enquiries related to this RFP, including any requests for information or clarification may only be directed in writing to the following person who will respond if time permits before the Closing Time. Information obtained from any other source is not official and should not be relied upon. Enquiries and any responses providing new information will be recorded and posted to BC Bid or otherwise distributed to prospective Proponents.

Allan.carlson@gov.bc.ca

The cut-off for submitting any questions related to this RFP to the Government Contact will be five business days before the Closing Time. Questions received after this time may not be answered.

PROPONENTS' MEETING:

A Proponents' meeting **will not** be held.

ENVIRONMENTAL CONSIDERATIONS FOR PROPOSAL DELIVERY:

The Province encourages Proponents to consider submitting an electronic proposal if that submission method is provided for on the cover page. When submitting in hard copy, the Province encourages Proponents to consider environmental stewardship, as per the following:

- Hard copy proposals should be double side printed on paper that is post-consumer recycled content or forest stewardship certified;
- Thin proposals should be stapled rather than bound;
- Binding, where required, should be comb-type (e.g. Cerlox) rather than plastic or wire spiral for ease of separating to shred and recycle; and
- Binders, where required, should be free from adhered labels (for ease of re use), and/or be made of post-consumer recycled content.

TABLE OF CONTENTS

1	SUMMARY OF THE OPPORTUNITY	1
2	RFP PROCESS RULES	2
3	SITUATION/OVERVIEW	8
3.1	Ministry Responsibility.....	8
3.2	The Libraries Branch Responsibilities	8
3.3	Background	9
3.4	Scope.....	9
4	CONTRACT	10
4.1	Contract Terms and Conditions	10
5	REQUIREMENTS.....	11
5.1	Capabilities.....	11
5.2	Approach.....	11
5.3	Price	17
6	PROPOSAL FORMAT	17
7	EVALUATION.....	18
7.1	Mandatory Criteria	18
7.2	Weighted Criteria.....	19
7.3	Price Evaluation	19
APPENDIX A	CONTRACT FORM.....	20
APPENDIX B	SAMPLE 2015 “TYPICAL WEEK” SURVEY QUESTIONS.....	20
APPENDIX C	SAMPLE 2015 “ANNUAL” SURVEY QUESTIONS	20
APPENDIX D	SAMPLE REPORT FORMATS.....	21

1 SUMMARY OF THE OPPORTUNITY

The Ministry of Education's Libraries Branch (LB) requires a web-based public library statistics collection and reporting system (the "Proposed System") to collect and report B.C. public library statistics.

The Proposed System should include a robust survey interface for LB Administrators to create, monitor and administer a 'Typical Week', 'Annual' or other surveys and for Library Users to respond to those surveys. Using the data collected through those surveys both Administrators and Library Users should be able to create, view, print and export pre-built and ad hoc reports.

The Proposed System **must** be web-based and accessible by users using Windows or Macintosh operating systems meeting or exceeding the minimum system specifications outlined in section 3.4.2 of this RFP. The Contractor will be responsible for hosting any Proposed System on its servers and for any data storage requirements.

The Proposed System should be a complete, turnkey solution requiring only minimal customization. Proposals for developing a new or substantially new system will not be accepted.

Libraries Branch has annual survey data dating back to 2002 and any Proposed System should provide the ability to import and export the Branch's historical survey data.

The term of any Contract resulting from this Request for Proposals is expected to be two years commencing November 15, 2016 with three one-year options to renew at the sole discretion of the Ministry.

Further details as to the scope of this opportunity and the requirements can be found in Sections 3, 4, and 5 of this RFP.

2 RFP PROCESS RULES

2.1 Definitions

Throughout this Request for Proposals, the following definitions apply:

“Addenda” means all additional information regarding this RFP including amendments to the RFP;

“BC Bid” means the BC Bid website located at www.bcbid.ca;

“Closing Location” includes the location or email address for submissions indicated on the cover page of this RFP, or BC Bid, as applicable;

“Closing Time” means the closing time and date for this RFP as set out on the cover page of this RFP;

“Contract” means the written agreement resulting from the RFP executed by the Province and the successful Proponent;

“Contractor” means the successful Proponent to the RFP who enters into a Contract with the Province;

“Government Contact” means the individual named as the contact person for the Province in the RFP;

“Government Electronic Mail System” or **“GEMS”** means the electronic mail system of the Province;

“Ministry” means the ministry of the Education of government of British Columbia issuing this RFP;

“must”, or **“mandatory”** means a requirement that must be met in order for a proposal to receive consideration;

“LB” or **“Branch”** means the Libraries Branch in the Ministry of Education;

“LB Administrator” means a staff member or other individual representing the Libraries Branch;

“Library User” means a staff member of other individual representing a library;

“Proponent” means a person or entity (excluding its parent, subsidiaries or other affiliates) with the legal capacity to contract, that submits a proposal in response to the RFP;

“proposal” means a written response to the RFP that is submitted by a Proponent;

“Proposed System” means the solution proposed by the proponents in response to this RFP;

“Province” means Her Majesty the Queen in Right of the Province of British Columbia and includes the Ministry;

“Request for Proposals” or **“RFP”** means the solicitation described in this document, including any attached or referenced appendices, schedules or exhibits and as may be modified in writing from time to time by the Province by Addenda; and

“should”, **“may”** or **“weighted”** means a requirement having a significant degree of importance to the objectives of the Request for Proposals.

2.2 Acceptance of Terms and Conditions

Submitting a proposal indicates acceptance of all the terms and conditions set out in the RFP, including those that follow and that are included in all appendices and any Addenda.

A proposal must be signed by a person authorized to sign on behalf of the Proponent with the intent to bind the Proponent to the RFP and to the statements and representations in the Proponent’s proposal. A scanned copy of the signed cover page of this RFP is acceptable as is a cover letter identifying the Proponent, identifying the RFP and including a signature of an authorized representative of the Proponent that confirms the Proponent’s intent to be bound. For proposals submitted via BC Bid attachment of the e-bidding key to an electronic proposal constitutes the signature of an authorized representative of the Proponent and is acceptable without additional signature.

2.3 Submission of Proposals

- a) Proposals must be submitted before Closing Time to the Closing Location using one of the submission methods set out on the cover page of this RFP. Proposals must not be sent by fax, except in the circumstances set out below. The Proponent is solely responsible for ensuring that, regardless of submission method selected, the Province receives a complete Proposal, including all attachments or enclosures, before the Closing Time.
- b) For electronic submissions (BC Bid or email), the following applies:
 - (i) The Proponent is solely responsible for ensuring that the complete electronic Proposal, including all attachments, is received before Closing Time;
 - (ii) The maximum size of each attachment must be 100 MB or less (Proponents are solely responsible for ensuring that email proposal submissions comply with any size restrictions imposed by the Proponent's internet service provider);
 - (iii) Proponents should submit email proposal submissions in a single email and avoid sending multiple email submissions for the same opportunity. If the file size of an electronic submission exceeds the applicable maximum size, the Proponent may make multiple submissions (BC Bid upload or multiple emails for the same opportunity) to reduce attachment file size to be within the maximum applicable size; Proponents should identify the order and number of emails making up the email proposal submission (e.g. "email 1 of 3, email 2 of 3...");
 - (iv) For email proposal submissions sent through multiple emails the Province reserves the right to seek clarification or reject the proposal if the Province is unable to determine what documents constitute the complete proposal;
 - (v) Attachments must not be compressed, must not contain a virus or malware, must not be corrupted and must be able to be opened. Proponents submitting by electronic submission are solely responsible for ensuring that any emails or attachments are not corrupted. The Province may reject proposals that are compressed, cannot be opened or that contain viruses or malware or corrupted attachments.
- c) Only pre-authorized e-bidders registered on BC Bid can submit electronic bids on BC Bid. BC Bid is a subscription service (\$150 per year) and the registration process may take two business days to complete. If using this submission method, Proponents should refer to the BC Bid website or contact BC Bid Helpdesk at 250-387-7301 for more information. An electronic proposal submitted on BC Bid must be submitted using the e-bidding key of an authorized representative of the Proponent. Using the e-bidding key of a subcontractor is not acceptable.
- d) For email proposal submissions, including any notices of amendment or withdrawal referred to in Section 2.9, the subject line of the email and any attachment should be clearly marked with the name of the Proponent, the RFP number and the project or program title.
- e) The Province strongly encourages Proponents using electronic submissions to submit proposals with sufficient time to complete the upload and transmission of the complete proposal and any attachments before Closing Time.
- f) The Proponent bears all risk associated with delivering its Proposal by electronic submission, including but not limited to delays in transmission between the Proponent's computer and the Government Electronic Mail System or BC Bid.
- g) While the Province may allow for email proposal submissions, the Proponent acknowledges that email transmissions are inherently unreliable. The Proponent is solely responsible for ensuring that its complete email proposal submission and all attachments have been received before Closing Time. If the Government Electronic Mail System rejects an email proposal submission for any reason, and the Proponent does not resubmit its proposal by the same or other permitted submission method before Closing Time, the Proponent will not be permitted to resubmit its proposal

after Closing Time. The Proponent is strongly advised to contact the Government Contact immediately to arrange for an alternative submission method if:

- (i) the Proponent's email proposal submission is rejected by the Government Electronic Mail System; or
- (ii) the Proponent does not receive an automated response email from the Province confirming receipt of the email and all attachments within a half hour of the time the email proposal submission was sent by the Proponent.

An alternate submission method may be made available, at the Province's discretion, commencing one half hour before the Closing Time, and it is the Proponent's sole responsibility for ensuring that a complete proposal (and all attachments) submitted using an approved alternate submission method is received by the Province before the Closing Time. The Province makes no guarantee that an alternative submission method will be available or that the method available will ensure that a Proponent's proposal is received before Closing Time.

2.4 Additional Information

All Addenda will be posted on BC Bid. It is the sole responsibility of the Proponent to check for Addenda on BC Bid. Proponents are strongly encouraged to subscribe to BC Bid's email notification service to receive notices of Addenda.

2.5 Late Proposals

Proposals will be marked with their receipt time at the Closing Location. Only complete proposals received and marked before the Closing Time will be considered to have been received on time. Proposals received late will be marked late and not considered or evaluated. In case of a dispute, the proposal receipt time as recorded by the Province at the Closing Location will prevail whether accurate or not.

2.6 Proposal Validity

Proposals will be open for acceptance for at least 90 days after the Closing Time

2.7 Firm Pricing

Prices will be firm for the entire Contract period unless the RFP specifically states otherwise.

2.8 Completeness of Proposal

By submitting a proposal, the Proponent warrants that, if the RFP is to design, create or provide a system or manage a program, all components required to run the system or manage the program have been identified in the proposal or will be provided by the Contractor at no additional charge.

2.9 Changes to Proposals

By submitting a clear and detailed written notice, the Proponent may amend or withdraw its proposal before the Closing Time. Unless the RFP otherwise provides, Proponents should use a consistent submission method for submitting proposals and any amendments or withdrawals. Upon Closing Time, all proposals become irrevocable. The Proponent will not change any part of its proposal after the Closing Time unless requested by the Province for purposes of clarification.

2.10 Conflict of Interest/No Lobbying

- a) A Proponent may be disqualified if the Proponent's current or past corporate or other interests, or those of a proposed subcontractor, may, in the Province's opinion, give rise to an actual or potential conflict of interest in connection with the services described in the RFP. This includes, but is not limited to, involvement by a Proponent in the preparation of the RFP or a relationship with any employee, contractor or representative of the Province involved in preparation of the RFP, participating on the evaluation committee or in the administration of the Contract. If a Proponent is in doubt as to whether there might be a conflict of interest, the Proponent should consult with the Government Contact prior to submitting a proposal. By submitting a proposal, the Proponent represents that it is not aware of any circumstances that would give rise to a conflict of interest that is actual or potential, in respect of the RFP.
- b) A Proponent must not attempt to influence the outcome of the RFP process by engaging in

lobbying activities. Any attempt by the Proponent to communicate for this purpose directly or indirectly with any employee, contractor or representative of the Province, including members of the evaluation committee and any elected officials of the Province, or with the media, may result in disqualification of the Proponent.

2.11 Subcontractors

- a) Unless the RFP states otherwise, the Province will accept proposals where more than one organization or individual is proposed to deliver the services described in the RFP, so long as the proposal identifies the lead entity that will be the Proponent and that will have sole responsibility to deliver the services under the Contract. The Province will enter into a Contract with the Proponent only. The evaluation of the Proponent will include evaluation of the resources and experience of proposed sub-contractors, if applicable.
- b) All subcontractors, including affiliates of the Proponent, should be clearly identified in the proposal.
- c) A Proponent may not subcontract to a firm or individual whose current or past corporate or other interests, may, in the Province’s opinion, give rise to an actual or potential conflict of interest in connection with the services described in the RFP. This includes, but is not limited to, involvement by the firm or individual in the preparation of the RFP or a relationship with any employee, contractor or representative of the Province involved in preparation of the RFP, participating on the evaluation committee or in the administration of the Contract. If a Proponent is in doubt as to whether a proposed subcontractor might be in a conflict of interest, the Proponent should consult with the Government Contact prior to submitting a proposal. By submitting a proposal, the Proponent represents that it is not aware of any circumstances that would give rise to a conflict of interest that is actual or potential, in respect of the RFP.
- d) Where applicable, the names of approved subcontractors listed in the proposal will be

included in the Contract. No additional subcontractors will be added nor other changes made to this list in the Contract without the written consent of the Province.

2.12 Evaluation

- a) Proposals will be assessed in accordance with the evaluation criteria. The Province will be under no obligation to receive further information, whether written or oral, from any Proponent. The Province is under no obligation to perform any investigations or to otherwise verify any statements or representations made in a proposal.
- b) Proposals from not-for-profit agencies will be evaluated against the same criteria as those received from any other Proponents.
- c) The Province may consider and evaluate any proposals from other jurisdictions on the same basis that the government purchasing authorities in those jurisdictions would treat a similar proposal from a British Columbia supplier.

2.13 Contract

- a) By submitting a proposal, the Proponent agrees that should its proposal be successful the Proponent will enter into a Contract with the Province on substantially the same terms and conditions set out in Appendix A and such other terms and conditions to be finalized to the satisfaction of the Province, if applicable.]
- b) Written notice to a Proponent that it has been identified as the successful Proponent and the subsequent full execution of a written Contract will constitute a Contract for the goods or services, and no Proponent will acquire any legal or equitable rights or privileges relative to the goods or services until the occurrence of both such events.

2.14 Contract Finalization Delay

If a written Contract cannot be finalized with provisions satisfactory to the Province within thirty days of notification of the successful Proponent, the Province may, at its sole discretion at any time thereafter, terminate discussions with that

Proponent and either commence finalization of a Contract with the next qualified Proponent or choose to terminate the RFP process and not enter into a Contract with any of the Proponents.

2.15 Debriefing

At the conclusion of the RFP process, all Proponents will be notified. Proponents may request a debriefing meeting with the Province.

2.16 Proponents' Expenses

Proponents are solely responsible for their own expenses in participating in the RFP process, including costs in preparing a proposal and for subsequent finalizations with the Province, if any. The Province will not be liable to any Proponent for any claims, whether for costs, expenses, damages or losses incurred by the Proponent in preparing its proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

2.17 Limitation of Damages

By submitting a proposal, the Proponent agrees that it will not claim damages, for whatever reason, relating to the Contract or in respect of the competitive process, in excess of an amount equivalent to the reasonable costs incurred by the Proponent in preparing its proposal and the Proponent, by submitting a proposal, waives any claim for loss of profits if no Contract is made with the Proponent.

2.18 Liability for Errors

While the Province has used considerable efforts to ensure information in the RFP is accurate, the information contained in the RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the Province, nor is it necessarily comprehensive or exhaustive. Nothing in the RFP is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

2.19 No Commitment to Award

The RFP should not be construed as an agreement to purchase goods or services. The lowest priced or any proposal will not necessarily be accepted. The RFP

does not commit the Province in any way to award a Contract.

2.20 No Implied Approvals

Neither acceptance of a proposal nor execution of a Contract will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any federal, provincial, regional district or municipal statute, regulation or by-law.

2.21 Legal Entities

The Province reserves the right in its sole discretion to:

- a) disqualify a proposal if the Province is not satisfied that the Proponent is clearly identified;
- b) prior to entering into a Contract with a Proponent, request that the Proponent provide confirmation of the Proponent's legal status (or in the case of a sole proprietorship, the Proponent's legal name and identification) and certification in a form satisfactory to the Province that the Proponent has the power and capacity to enter into the Contract;
- c) not to enter into a Contract with a Proponent if the Proponent cannot satisfy the Province that it is the same legal entity that submitted the Proponent's proposal; and
- d) require security screenings for a Proponent who is a natural person, subcontractors and key personnel before entering into a Contract and decline to enter into a Contract with a Proponent or to approve a subcontractor or key personnel that fail to pass the security screenings to the Province's satisfaction.

2.22 Reservation of Rights

In addition to any other reservation of rights set out in the RFP, the Province reserves the right, in its sole discretion:

- a) to modify the terms of the RFP at any time prior to the Closing Time, including the right to cancel the RFP at any time prior to entering into a Contract with a Proponent;

- b) in accordance with the terms of the RFP, to accept the proposal or proposals that it deems most advantageous to itself;
- c) to waive any non-material irregularity, defect or deficiency in a proposal;
- d) to request clarifications from a Proponent with respect to its proposal, including clarifications as to provisions in its proposal that are conditional or that may be inconsistent with the terms and conditions of the RFP, without any obligation to make such a request to all Proponents, and consider such clarifications in evaluating the proposal;
- e) to reject any proposal due to unsatisfactory references or unsatisfactory past performance under contracts with the Province, or any material error, omission or misrepresentation in the proposal;
- f) at any time, to reject any or all proposals; and
- g) at any time, to terminate the competition without award and obtain the goods and services described in the RFP by other means or do nothing.

2.23 Ownership of Proposals

All proposals and other records submitted to the Province in relation to the RFP become the property of the Province and, subject to the provisions of the *Freedom of Information and Protection of Privacy Act* and the RFP, will be held in confidence. For more information on the application of the Act, go to http://www.cio.gov.bc.ca/cio/priv_leg/index.page.

2.24 Copyright

This document is subject to copyright and may be used, reproduced, modified and distributed to the extent necessary for the Proponent to prepare and submit a proposal.

2.25 Confidentiality Agreement

The Proponent acknowledges that prior to the Closing Time it may be required to enter into a confidentiality agreement with the Province in order

to obtain access to confidential materials relevant to preparing a proposal.

2.26 Alternative Solutions

If more than one approach to deliver the services described in the RFP are offered, Proponents should submit the alternative approach in a separate proposal.

2.27 Collection and Use of Personal Information

Proponents are solely responsible for familiarizing themselves, and ensuring that they comply, with the laws applicable to the collection and dissemination of information, including resumes and other personal information concerning employees and employees of any subcontractors. If the RFP requires Proponents to provide the Province with personal information of employees who have been included as resources in response to the RFP, Proponents will ensure that they have obtained written consent from each of those employees before forwarding such personal information to the Province. Such written consents should specify that the personal information may be forwarded to the Province for the purposes of responding to the RFP and used by the Province for the purposes set out in the RFP. The Province may, at any time, request the original consents or copies of the original consents from Proponents, and upon such request being made, Proponents will immediately supply such originals or copies to the Province.

2.28 Trade Agreements

This RFP is covered by trade agreements between the Province and other jurisdictions, including the following:

- a) Agreement on Internal Trade;
- b) New West Partnership Trade Agreement; and
- c) Trade, Investment and Labour Mobility Agreement.

3 SITUATION/OVERVIEW

3.1 Ministry Responsibility

The purpose of the British Columbia school system is to enable the approximately 550,000 public and 80,000 independent school students, and over 2,200 home-schooled children, enrolled each school year, to develop their individual potential and to acquire the knowledge, skills and abilities needed to contribute to a healthy society and a prosperous and sustainable economy.

The Ministry provides leadership and funding to the K-12 education system through governance, legislation, policy and standards. The Ministry's role in helping to meet the purpose of the school system involves co-governing the K-12 education system with boards of education, working closely with a network of partners, including independent school authorities, professional education organizations, public libraries, First Nations representatives, provincial ministries and agencies and the private sector.¹

To help meet the Ministry's objectives Libraries Branch (LB or the Branch) fosters and enables efficient, effective and connected library programs and services for BC residents. The goal of the Libraries Branch is to strengthen the library network by providing support for shared services, innovation, collaboration and partnerships, leading to programs and services mutually supported by public libraries.

In BC, the Library Act outlines the mechanisms by which public libraries are created and governed, as well as providing the general rules and principles for public library service.

3.2 The Libraries Branch Responsibilities

The mission of the LB is to support libraries in improving and promoting library service and to provide expertise respecting public library policy and legislation for the benefit of all British Columbians.

The key initiatives of the Branch are to:

1. Engage the library community and its partners in the continuing implementation of new strategic plan initiatives; and
2. Support libraries in the delivery of equitable library services across the province.

¹ The Ministry of Education [2016/17 - 2018/19 Service Plan](#)

The LB captures, analyzes and publishes statistics on an annual basis on behalf of the BC public library community and government. With these statistics the branch measures the success of initiatives, determines trends in library use.

The Branch reviews outcomes annually to ensure program and services are delivered effectively and in alignment with Ministry objectives.

In addition, BC public libraries use the library statistics collected by LB to assess their performance over time and to compare that performance against other libraries.

The statistics are collected using an online survey and are published on the Open Data BC website in Excel and CSV formats <https://catalogue.data.gov.bc.ca/dataset/bc-public-libraries-statistics-2002-present>. The statistics from 2002 to the most recently available results are also accessible to BC public library staff through a password-protected reporting tool. The reporting tool allows users to view library statistics over time, to compare peer groups of libraries and to output the results for further analysis.

As the collection and reporting of BC public library statistics is a key function of the Branch, LB would like to evaluate available options for providing these services.

3.3 Background

Currently, the LB collects statistics from all 71 public libraries and 6 library federations in the province on an annual basis. Each BC public library completes two related surveys each year. Libraries complete a short, 5 question “Typical Week” survey in October or November of each year; annual estimates based on those answers are automatically populated in the corresponding ‘Annual Survey’. The ‘Annual Survey’ includes approximately 240 questions. Please see Appendix B of Typical Week and Appendix C for examples of the questions asked in the 2015 ‘Annual Survey’.

In July 2011, the LB issued a RFP to seek a broad range of proponents that would be able to offer robust survey and report functionality. Counting Opinions was the successful proponent of that process and is the current supplier of the services described in this RFP.

3.4 Scope

3.4.1 CONTRACTOR’S RESPONSIBILITIES

The Contractor will provide a web-based public library statistics collection and reporting system and related services for use by the Province and all British Columbia public libraries.

The Proposed System should be a complete, turn-key solution requiring only minimal customization. Proposals for developing a new or substantially new System will not be accepted.

The Contractor will be responsible for hosting any Proposed System on its servers and for any data storage requirements.

3.4.2 CURRENT SPECIFICATIONS

The information below represents the anticipated minimum system specifications of Windows, Macintosh and Linux systems used by Ministry and Library Users.

Minimum System Specifications:

	Operating System	Web Browser
Windows	Windows XP	<ul style="list-style-type: none">• Microsoft Internet Explorer 6.0 or higher• Firefox 1.5 or higher• Safari 4 or higher• Chrome 7 or higher
Macintosh	Mac OS X 10.5	<ul style="list-style-type: none">• Firefox 1.5 or higher• Safari 4 or higher• Chrome 7 or higher

The Proposed System should also work with the higher most current specifications for each.

3.4.3 CONTRACT TERM

The term of any Contract resulting from this Request for Proposals is expected to be two (2) years commencing November 15th, 2016 with three (3) one-year options to renew at the sole discretion of the Ministry.

4 CONTRACT

4.1 Contract Terms and Conditions

Proponents should review carefully the terms and conditions set out in Appendix A Contract Form, including the Schedules.

5 REQUIREMENTS

In order for a proposal to be considered, a Proponent must clearly demonstrate that they meet the mandatory requirements set out in Section 7.1 (Mandatory Criteria) of the RFP.

This section includes “Response Guidelines” which are intended to assist Proponents in the development of their proposals in respect of the weighted criteria set out in Section 7.2 of the RFP. The Response Guidelines are not intended to be comprehensive. Proponents should use their own judgement in determining what information to provide to demonstrate that the Proponent meets or exceeds the Province’s expectations.

Please address each of the following items in your proposal in the order presented. Proponents may find it helpful to use the individual Response Guidelines as headings for proposal responses.

5.1 Capabilities

Proponents should have 3 or more years’ experience providing web-based statistics collection and reporting systems to multiple public library systems that may have multiple branches within each system.

Response Guidelines for Capabilities

1. Name a contact person for the Proponent, and include this person’s address, phone and fax numbers, and email address. This information will not be evaluated, but will be used to contact the Proponent as required.
2. Provide a list of public library systems that have used the Proposed System for web-based statistics collection and reporting within the past 3 years. For each library system include the date the library system started using the Proposed System and the number of individual library locations the library system gathers information from using the Proposed System.

5.2 Approach

5.2.1 WEB BASED REQUIREMENTS

Computer hardware and software used by Ministry and Library Users may vary and individual users may have limited ability to modify their system’s installed software. Additionally, users of any Proposed System will be geographically dispersed. As a result, the Proposed System **must** be web-based and accessible by users using Windows or Macintosh operating systems meeting or exceeding the minimum system specifications outlined in section 3.4.2 of this RFP.

The Contractor will be responsible for hosting any Proposed System on its servers and for any data storage requirements of the Proposed System.

Response Guidelines for Web Based Requirements:

1. To meet this mandatory requirement, provide a username, password, brief instructions and/or any other information needed for the Ministry to access the Proposed System to confirm that the above mandatory has been met.

Proponents will **not** have the option of providing this information after the closing date and time.

NOTE: As part of the evaluation process the Ministry will confirm compliance with this mandatory requirement by logging into the Proposed System via the web. If a Proposal does not contain the information that will allow the Ministry to test compliance the mandatory requirement will not be met. If the Ministry is unable to access the Proposed System using the information provided the mandatory will not be met.

The Ministry reserves the right to contact Proponents for assistance if it is unable to access the Proposed System.

2. Provide a list of the operating systems and web browsers currently supported by the Proposed System.

5.2.2 TURN KEY SOLUTION

The Proposed System should be a complete, turn-key solution requiring only minimal customization. Proposals for developing a new or substantially new System will not be accepted.

Response Guidelines for Turn Key Solution:

3. To meet this requirement Proponents should supply sufficient information to demonstrate that the Proposed System is a complete turnkey solution.

This criterion will be evaluated as Pass/Fail. Failing proposals will not be further considered.

5.2.3 USER AUTHENTICATION AND MANAGEMENT

The Proposed System should provide the ability to manage and authenticate users with various permissions and abilities within the system.

LB Administrators should be able to add new Library Users, edit all users' details (username, password, contact information, etc.) and grant or revoke all users' permissions within the system e.g. grant a Library User the ability to respond to survey questions on behalf of his/her library only.

The ability for individual users to modify their own details (username, password, contact information, etc.) is also desirable.

Response Guidelines for User Authentication and Management:

4. Describe how users are managed within the Proposed System including how new users are added, by whom and how user details are edited.
5. Describe how user permissions are managed within the Proposed System and by whom. Include details about how individual Library Users can be restricted to responding to survey questions on behalf of his/her library only.

5.2.4 SURVEY INTERFACE

The Proposed System should include a robust survey interface for LB Administrators to create, monitor and administer the 'Typical Week', 'Annual' or other surveys and for Library Users to respond to those surveys (see Appendix B and Appendix C).

5.2.4.1 Survey Creation and Administration

LB Administrators should be able to create new or modify existing surveys within the Proposed System.

When creating survey questions LB Administrators should be able to specify the data type for a Library User's response; control Library Users' responses through the use of input controls such as text boxes, radio buttons and drop-down menus; and provide context-specific help to Library Users through the creation of definitions/instructions for each question. The ability to create questions at both the library system level and at the branch level should be part of the Proposed System along with the ability for the Proposed System to aggregate the responses to branch level questions up to the library system level.

The Proposed System should have the ability to collect both quantitative and qualitative information and provide LB Administrators the ability to provide parameters for qualitative responses as well as the ability for Library Users to add notes to such responses.

Possible data types for question responses should include:

- Integer;
- Text;
- Money/Currency; and
- Yes/No.

The Proposed System should have the ability to automatically calculate fields where specified e.g. multiply the response to one survey question by the response to another survey question.

LB Administrators should be able to view the status of each survey response (i.e. not started, in progress, complete) and view and edit data from all library systems for all years and surveys represented.

Response Guidelines for Survey Creation and Administration:

6. Describe how LB Administrators are able to create and administer surveys within the Proposed System.

5.2.4.2 Survey Response

As Library Users may complete their response to a survey over multiple sessions, the Proposed System should allow them the ability to save their progress and resume at a later time.

Library Users should be able to view any context-specific definitions/instructions provided by the survey's creator for a particular question and automatically receive feedback when a response to a question violates any data-validation rules; for example, the Library User should receive automatic feedback if they have entered text as a response to an integer data type question or an integer that is outside a specified range. Library Users should be able to submit question-level comments to the survey's creator.

The ability for Library Users to sort or view survey questions based on criteria such as unanswered questions or questions not passing data-validation rules is also desirable.

To assist Library Users in their response the Proposed System should provide the option of showing any previous year's responses they provided to the same question and provide the ability to print a blank hardcopy of the current survey, a copy of the survey showing previous year's data and/or a survey showing current and previous year's data.

Response Guidelines for Survey Response:

7. Describe how Library Users can view and respond to a survey within the Proposed System.

5.2.5 REPORTING INTERFACE

Both LB Administrators and Library Users should be able to create, view, print and export pre-built and ad hoc reports within the Proposed System.

Users should be able to create and view reports using data from all previous years' survey data existing in the system, compare an individual library to other libraries and create peer-groups of libraries based on any data element (i.e. libraries that serve a similar population, are in the same library federation or have similar funding levels). Any ad hoc report created should be able to be saved for use in later sessions. The Proposed System should calculate basic statistics (sum, median, mode) and display data in table or graph formats. The ability to export report data to Excel and/or character delimited file is desirable.

See Appendix D for sample ad hoc reports. Proponents may also view publicly available reports at:

https://catalogue.data.gov.bc.ca/dataset?=&q=public+library+data&sort=score+desc%2C+record_publish_date+desc

Response Guidelines for Reporting Interface:

8. Describe how LB Administrators and Library Users can create, view, print and export pre-built and ad hoc reports within the Proposed System.

5.2.6 DATA MANAGEMENT

Any Proposed System should allow LB Administrators to manage and update or amend all current and historical data in the system. LB Administrators should be able to batch upload data and export data to Excel and/or character delimited files.

The LB has annual survey data dating back to 2002. Any Proposed System should provide the ability to import LB's historical survey data into the Proposed System.

Response Guideline for Data Management:

9. Describe how LB Administrators can manage and update or amend all current and historical data in the Proposed System.
10. Describe how LB Administrators can export data from the Proposed System.
11. Describe how LB's historical survey data can be imported into the Proposed System.

5.2.7 TECHNICAL SUPPORT

The Contractor should provide technical support at no extra cost to LB Administrators and Library Users. This support should be available during regular working hours (8:30 am – 4:30 pm Pacific Time) Monday to Friday and be available via phone and email.

Response Guidelines for Technical Support:

12. Describe technical support offered by the Proponent.

5.2.8 TRAINING

The Contractor should provide opportunities for training in the use of the Proposed System to LB Administrators and Library Users. This training should include an end user manual, and should include a mix of self-directed training such as user manuals, walkthroughs and/or tutorial videos and interactive training with an instructor either in-person or through video-conferencing or similar tools.

Response Guidelines for Training:

13. Describe training opportunities offered to LB Administrators and Library Users.

5.3 Price

Proponents will provide a single all inclusive annual process for each year of the Contract term. Prices quoted will be deemed to be in Canadian dollars exclusive of any applicable taxes.

Response Guidelines for Price

1. Using a table like the one below, provide annual prices for each year of the Contract term.

Year	Price
1	\$
2	\$
3	\$
4	\$
5	\$
Total for all 5 years	

6 PROPOSAL FORMAT

Proponents should ensure that they fully respond to all requirements in the RFP in order to receive full consideration during evaluation.

The following format, sequence, and instructions should be followed in order to provide consistency in Proponent response and ensure each proposal receives full consideration. All pages should be consecutively numbered.

- a) Signed cover page (see section 7.1 Mandatory Criteria).
- b) Table of contents including page numbers.
- c) A short (one or two page) summary of the key features of the proposal.
- d) The body of the proposal, including pricing, i.e. the “Proponent Response”.
- e) Appendices appropriately tabbed and referenced.
- f) Identification of Proponent (legal name)
- g) Identification of Proponent contact (if different from the authorized representative) and contact information.

7 EVALUATION

Evaluation of proposals will be by a committee formed by the Province and may include employees and contractors of the Province and other appropriate participants

The Province’s intent is to enter into a Contract with the Proponent who has met all mandatory criteria and minimum scores (if any) and who has the highest overall ranking. Proposals will be assessed in accordance with the entire requirement of the RFP, including mandatory and weighted criteria.

7.1 Mandatory Criteria

Proposals not clearly demonstrating that they meet the following mandatory criteria will be excluded from further consideration during the evaluation process.

Mandatory Criteria	
a)	The proposal must be received at the Closing Location before the Closing Time.
b)	The proposal must be in English.
c)	The proposal must be submitted using one of the submission methods set out on the cover page of the RFP and in accordance with Section 2.3.
d)	The proposal must either (1) include a copy of the cover page that is signed by an authorized representative of the Proponent or (2) otherwise identify the RFP, identify the Proponent and include the signature of an authorized representative of the Proponent that confirms the Proponent’s intent to be bound.
e)	The Proposed System must be web-based and accessible by users using Windows or Macintosh operating systems meeting or exceeding the minimum system specifications outlined in section 3.4.2 of this RFP. See section 5.2.1 for submission requirements.

7.2 Weighted Criteria

Proposals meeting all of the mandatory criteria will be further assessed against the following weighted criteria.

Weighted Criteria	Weight
Capabilities (section 5.1)	10
Approach (section 5.2)	55
Price (section 5. 3)	35
TOTAL	100

7.3 Price Evaluation

Price will be evaluated using the total costs calculated as the sum of the annual prices for each year of the Contract term.

The lowest total cost of all proposals will receive the maximum points awarded for Price.

All other proposal will be evaluated and points awarded using the following formula:

$$\frac{\text{Lowest Total Cost of all Proposals}}{\text{This Proposal's Total Cost}} \times \text{Points Allocated to Price}$$

Appendix A Contract Form

By submitting a proposal, the Proponent agrees that should its proposal be successful the Proponent will enter into a Contract with the Province on substantially the same terms and conditions of the **attached** draft General Services Agreement (see Appendix A Contract Form on BC BID under “Supplier Attachments Exist”) and such other terms and conditions to be finalized to the satisfaction of the Province.

Appendix B Sample 2015 “Typical Week” Survey Questions

Please see the file Appendix B Typical Week 2015 included with this RFP on BC Bid under “Supplier Attachments Exist”.

Appendix C Sample 2015 “Annual” Survey Questions

Please see the file Appendix C 2015 Survey Questions Short included with this RFP on BC Bid under “Supplier Attachments Exist”.

Appendix D Sample Report Formats

Sample 1: One library, multiple data elements, multiple years

Data Elements	2009	2010	2011	2012	2013	2014	2015	2016
Average hours open per week all service points	41.4	41.4	41.4	42.64	40.56	40.8	41	40
Circulation per capita	10.46	10.05	9.85	9	8.78	8.88	7.08	8.54
In person visits per capita	8.14	8.84	7.99	8.35	10.3	10.2	9.58	11.34
Population of service area	8,989	8,797	8,810	8,870	8,897	8,856	8,936	8,955
Total active cardholders	6,556	6,900	5,731	3,245	3,710	4,241	3,960	4,256
Total employees FTE	3.68	4.21	3.85	4.19	4	4.61	4.64	3.03
Total expenditure per capita	\$34.00	\$35.66	\$29.83	\$39.63	\$36.56	\$38.86	\$43.11	\$38.75
Total library programs in library	66	80	88	70	93	111	142	117
Total materials volumes held	35,434	35,939	39,846	34,395	31,889	31,630	40,904	41,948
Total program attendance	944	1,196	760	548	1,233	1,720	1,852	1,477
Total reference transactions	2,409	2,421	2,281	2,568	3,293	3,243	2,437	2,503
Total Revenue per Capita	\$0.00	\$N/A	\$34.31	\$36.36	\$37.90	\$43.22	\$42.76	\$41.00

Sample 2: Many libraries, one data element, many years.

Libraries	2009	2010	2011	2012	2013	2014	2015	2016
Alert Bay Public Library	1	2	2	2	2	2	2	2
Beaver Valley Public Library	9	9	5	4	4	9	9	8
Bowen Island Public Library	2	3	3	3	3	3	3	4
Burnaby Public Library	224	222	225	232	235	246	259	247
Burns Lake Public Library	6	5	6	7	9	7	9	7
Cariboo Regional District Library	45	45	46	49	48	44	49	49
Castlegar & District Public Library	8	9	7	8	7	7	8	9
Chetwynd Public Library	5	10	9	8	7	8	12	14
Coquitlam Public Library	90	91	91	82	82	80	84	86
Cranbrook Public Library	12	10	12	12	12	14	21	21
Creston Public Library	8	8	9	10	13	13	14	14
Dawson Creek Municipal Public Library	10	11	10	11	11	12	15	14

RFP No. 7952 Public Library Statistics Collection and Reporting System

Libraries	2009	2010	2011	2012	2013	2014	2015	2016
Elkford Public Library	0	2	2	2	2	2	2	2
Fernie Public Library	6	6	6	6	6	7	7	7
Fort Nelson Public Library	6	6	6	6	6	6	6	6
Fort St. James Public Library	3	3	3	4	4	4	4	4
Fort St. John Public Library	16	15	15	15	16	16	19	16
Fraser Lake Public Library	5	6	3	5	4	5	5	4
Fraser Valley Regional Library	347	368	383	378	383	384	381	313
Gibsons & District Public Library	8	9	9	9	10	11	9	12
Grand Forks & District Public Library	6	5	6	6	5	8	10	9
Granisle Public Library	4	4	5	5	5	3	3	3
Greater Victoria Public Library	261	261	285	288	331	349	311	331
Greenwood Public Library	2	2	2	2	2	3	4	4
Hazelton District Public Library	6	6	6	6	6	9	9	13
Houston Public Library	4	3	3	3	4	4	6	6
Hudson's Hope Public Library	3	3	3	3	3	3	3	3
Invermere Public Library	1	2	2	2	2	2	2	3
Kaslo & District Public Library	0	1	2	3	3	4	6	4
Kimberley Public Library	7	6	6	6	6	4	7	7
Kitimat Public Library	9	9	9	9	9	9	11	9
Lillooet Area Public Library	9	9	9	9	11	19	12	14
Mackenzie Public Library	8	7	6	7	8	9	9	7
McBride & District Public Library	4	4	4	4	4	4	4	7
Midway Public Library	1	1	1	2	3	3	2	2
Nakusp Public Library	6	5	5	5	5	5	4	5
Nelson Municipal Library	11	11	11	11	11	11	15	15
New Westminster Public Library	66	71	68	68	67	69	64	63
North Vancouver City Library	39	38	39	43	40	42	46	47
North Vancouver District Public Library	106	113	114	121	126	120	127	110
Okanagan Regional Library	197	221	231	233	263	227	196	213
Pemberton & District Public Library	3	3	4	7	7	6	9	8
Pender Island Public Library	0	0	0	0	0	0	0	0
Penticton Public Library	18	18	18	18	22	24	22	22

RFP No. 7952 Public Library Statistics Collection and Reporting System

Libraries	2009	2010	2011	2012	2013	2014	2015	2016
Port Moody Public Library	19	19	19	20	22	23	23	22
Pouce Coupe Public Library	1	2	2	2	5	7	7	5
Powell River Public Library	11	12	12	17	16	22	25	22
Prince George Public Library	62	61	53	54	63	63	66	66
Prince Rupert Library	15	13	15	16	15	15	14	15
Radium Hot Springs Public Library	N/A	N/A	N/A	N/A	1	1	1	1
Richmond Public Library	95	92	92	99	100	125	138	131
Rossland Public Library	5	6	6	6	6	6	6	6
Salmo Public Library	2	2	3	3	3	2	2	2
Salt Spring Island Public Library	0	0	1	1	3	4	4	4
Sechelt Public Library	8	8	9	9	10	10	13	13
Smithers Public Library	5	5	6	8	8	8	9	9
Sparwood Public Library	5	4	4	4	4	4	4	5
Squamish Public Library	12	16	16	16	18	21	18	15
Stewart Public Library	2	1	1	1	1	2	2	1
Surrey Public Library	151	176	225	211	217	228	238	238
Taylor Public Library	N/A	N/A	N/A	N/A	0	3	4	4
Terrace Public Library	17	16	17	17	20	25	25	21
Thompson-Nicola Regional District Library System	113	115	113	114	114	125	133	109
Trail & District Public Library	13	13	14	14	14	14	14	4
Tumbler Ridge Public Library	6	6	6	6	6	8	9	8
Valemount Public Library	4	0	6	6	6	5	6	5
Vancouver Island Regional Library	311	316	356	356	184	389	369	376
Vancouver Public Library	793	733	808	716	808	791	803	768
Vanderhoof Public Library	3	4	4	4	3	4	4	5
View Royal Public Library	0	0	0	0	0	0	0	0
West Vancouver Memorial Library	69	68	68	77	70	75	75	72
Whistler Public Library	10	12	21	11	12	18	27	35

RFP No. 7952 Public Library Statistics Collection and Reporting System

Sample 3: Many libraries, many data elements, one year

Libraries	In person visits per capita	Circulation per capita	Public access workstation sessions	Program attendance per capita	Population of service area
Burns Lake Public Library	2.74	7.37	4,166	0.38	7,097
Fernie Public Library	6.39	9.42	7,200	0.56	7,557
Fort Nelson Public Library	4.59	6.19	4,767	0.05	6,216
Grand Forks & District Public Library	11.34	8.54	8,655	0.16	8,955
Hazelton District Public Library	2.25	0	4,050	0.07	6,740
Invermere Public Library	2	3.69	2,200	0.08	8,677
Kimberley Public Library	3.86	7.1	8,315	0.16	8,356
Kitimat Public Library	8.54	9.43	11,921	0.26	9,182
Nelson Municipal Library	17.21	17.17	26,490	0.32	9,752
Smithers Public Library	6.74	9.65	7,059	0.19	7,658
Trail & District Public Library	4.43	8.27	5,867	0.07	9,147
Vanderhoof Public Library	3.65	3.95	2,900	0.17	7,272
Whistler Public Library	29.75	19.81	17,550	0.93	9,999