REQUEST FOR PROPOSALS
STATEWIDE CHAT REFERENCE SERVICE ("ASK HERE PA")

ISSUED BY
HOSTING SOLUTIONS & LIBRARY CONSULTING (HSLC)
3600 Market Street, Suite 550
Philadelphia, PA 19104-2649
Attention: Maryam Phillips, Executive Director
215-222-1532
phillips@hslc.org
www.hslc.org

ISSUED ON
September 8, 2017

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PART I

GENERAL INFORMATION

I-1. PURPOSE

Hosting Solutions & Library Consulting (HSLC) seeks proposals for software and staffing of Pennsylvania's statewide chat reference service. Proposals may address the software and/or staffing, but each must be addressed separately, with costs for each clearly identified. For the software, HSLC seeks a vendor-hosted solution. Product demonstrations may be required. Vendors submitting proposals to provide staffing only must clearly identify which software products they support.

For the purposes of this RFP, statewide chat reference service shall be a term inter-changeable with what is traditionally recognized as Ask Here PA, and is now branded as Chat with a Librarian. *Offeror*, *Contractor*, and *Vendor* are also used inter-changeably within this RFP.

Solutions proposed will be evaluated on ability to deliver the objectives within this RFP, regardless of product name. The selected system must be flexible, efficient, intuitive, and easy to maintain and sustain. Proposals will be rated on all of these factors. See Part IV for detailed Work Statement.

Flexibility
- System must comply with all NISO standards including compliance with Section 508 for ADA accessibility. Any failure to meet any specification of either must be detailed with plans provided for meeting the standard.
- System must allow configuration by HSLC to customize and brand the user experience.
- System must operate effectively on a variety of device platforms, whether computer-based or mobile.

Reliability
- System is expected to be operational 24/7/365 with redundancy and reliability measures that prevent service interruptions.
- System must deliver consistently high performance to users with all types of internet connections whether high-speed or not.

Intuitiveness
- System must offer user-friendly interface for staff and the general public, including the ability to integrate with social networking tools.
- System must provide an easy-to-find and easy-to-use Help section for end-users.
- System must employ built-in reporting capabilities that are easy to navigate and customize for library collection of data.

- System must provide easily accessible documentation on features and functionality for staff.

Maintenance & Security
- The software should be hosted by the vendor and data should be protected against loss.
- The software shall use Secure Socket Layer (SSL) protocols to protect patron privacy.

Sustainability
- System must remain affordable to own and operate, with multi-year pricing provided.

I-2. ISSUING OFFICE

This RFP is issued by Hosting Solutions & Library Consulting (HSLC), Philadelphia PA.

I-3. SCOPE

This RFP contains instructions governing the proposals to be submitted and the material to be included therein; a description of the service to be provided; requirements that must be met to be eligible for consideration; general evaluation criteria; and other requirements to be met by each proposal.

I-4. BACKGROUND

HSLC is soliciting proposals from qualified Offerors to provide software and staffing for the statewide chat reference service, Chat with a Librarian (formerly known as Ask Here PA). This service is available to all residents of Pennsylvania and as of July 2017 there are approximately 35 participating libraries.

The successful Offeror will be expected to execute a contract for one (1) year with options for up to four (4) one-year renewals.

I-5. CONTRACT

It is proposed that if a contract is entered into as a result of this RFP, it will be fully executed in time for the project to go live on or after February 1, 2018. Negotiations may be undertaken with Offerors whose proposals show them to be qualified, responsible and capable of performing the work. Cost will not be the sole criteria for final selection.

I-6. REJECTION OF PROPOSALS

HSLC reserves the right to reject any and all proposals received as a result of this request, or to negotiate separately with competing Offerors.

I-7. INCURRING COSTS

HSLC is not liable for any cost incurred by Offerors prior to issuance of a fully executed contract.

I-8. INTENT TO RESPOND AND PROPOSAL OPEN PERIOD QUESTIONS

A Vendor intending to respond to the RFP may notify HSLC as soon as possible by sending a letter of intent via email to HSLC Executive Director, Maryam Phillips, at phillips@hslc.org. The email should indicate the Vendors' intent to respond to the software and/or staffing portion of this RFP. Should a Vendor have a question from September 1 through September 22, hereafter, the "open period", HSLC will post the question and our response in a secure location and make that location and access information available to all respondents who notified HSLC of their intent to respond. Address questions about the RFP to Maryam Phillips, Executive Director HSLC at phillips@hslc.org. Use a return receipt method to ensure your communication was received.

I-9. AMENDMENT TO THE RFP

If it becomes necessary to revise any part of this RFP, an amendment will be issued to all Offerors who received the basic RFP or requested a copy.

I-10. RESPONSE DATE

To be considered, four originals and one electronic copy of the proposal with supporting documents must be received by Maryam Phillips, Executive Director, HSLC, 3600 Market Street, Suite 550, Philadelphia, PA 19104-2649 **on or before Friday, September 29, 2017 at 4 P.M. Eastern Time.** Offerors mailing proposals should allow sufficient mail delivery time to ensure timely receipt of their proposals, and should supply the tracking code(s) to HSLC. The electronic copy may be emailed, submitted securely to the HSLC FTP server, or provided on CD/DVD. Use Return Receipt to confirm delivery of emailed proposals. Proposals may also be hand delivered to this address. **No faxes please**.

All questions regarding the RFP or its process are to be emailed to Maryam Phillips at phillips@hslc.org.

I-11. PROPOSALS

To be considered, Offerors must submit a complete response to the RFP, using the format provided in Part II. Each proposal must be submitted with not less than four originals and one electronic copy to HSLC. An official authorized to bind the Offeror to its provisions, including costs for the initial and renewal periods, must sign your proposal. Your proposal must remain valid for at least one hundred twenty (120) days. Moreover, the contents of the proposal of the successful bidder will become contractual obligations within any subsequent contract or agreement.

I-12. PROPOSAL PREPARATION

Proposals should be complete, indexed by section, and provide a straightforward description of the Offeror's ability to meet the requirements of the RFP.

Responses to the RFP must contain the following:

1.   Legal name and mailing address of the Offeror.
2.   Name, title, mailing address, email address and telephone number of the person responsible for approving and submitting the information provided.
3.   The name, title, email address and telephone number of a person who can be contacted to discuss questions regarding the technical specifications outlined in the proposal if different from the person in I-12, 2.
4.   Complete concise responses to all items listed in the Work Plan, the Offeror's capability to handle the items, and to items listed under the Cost and Price Analysis.
5.   A timetable of the activities involved.

I-13. ORAL PRESENTATION

HSLC will review all proposals. Companies that submit proposals may be required to make an oral presentation and/or demonstrate their system to HSLC and/or representatives from Pennsylvania libraries. Such product demonstrations provide an opportunity for the Offeror to clarify the proposal and substantiate information sufficiently to ensure thorough mutual understanding. HSLC will schedule these presentations as necessary.

I-14. PRIME CONTRACTOR RESPONSIBILITIES

The selected Offeror will be required to assume responsibility for providing all services offered in the proposal whether or not its company produces them or provides them via a sub-contractor arrangement. HSLC will consider the selected Offeror to be the sole point of contact with regard to contractual matters.

I-15. DISCLOSURE OF PROPOSAL CONTENTS

All information provided in proposals will be held in confidence and except for the selected proposal, will not be revealed or discussed with competitors. All other material submitted becomes the property of HSLC and may be reviewed and evaluated by any person other than competing bidders at the discretion of HSLC. HSLC reserves the right to use any or all ideas presented in any reply to the RFP. Selection or rejection of your proposal does not affect this right.

I-16. STANDARD CONTRACT

Attach a Standard Contract with Service Level Agreement as Appendix C of your proposal. No part of this contract may be subcontracted without the written permission of HSLC.

I-17. DEBRIEFING CONFERENCES

Contractors whose proposals are not selected will be notified of the name(s) of the selected contractor(s) and will be given the opportunity to be debriefed if requested. HSLC will schedule the time and location of the debriefing.

I-18. NEWS RELEASES

News releases pertaining to this project will not be issued without prior review and approval by HSLC.

I-19. COST DATA

The price section of the proposal must be bound and sealed separately from the main technical proposal document.

Failure to meet this requirement will result in automatic disqualification of the proposal.

I-20. RIGHTS IN DATA

The term data, as used herein, includes reports and other materials, which are required to be delivered or are generated under this agreement. It does not include the Offeror's financial reports, software programs to which the Offeror holds copyright or other information incidental to agreement administration.

Defense of suits: Offeror shall defend any suit or proceedings brought against HSLC or the PA Department of Education, including the Office of Commonwealth Libraries, due to any alleged infringement of any copyright arising out of the performance of this agreement, including any suit or

proceeding relating to work, services, materials, reports, studies and computer programs provided by the Offeror; provided, that HSLC shall provide prompt notification in writing of such suit or proceedings, together with full right, authorization and opportunity to conduct the defense of the same. If principles of governmental or public law are involved, HSLC may participate in the defense of such action. Contractor shall pay any damages and costs awarded therein against HSLC.   If information and assistance are furnished by HSLC at the contractor's written request, it shall be at the contractor's expense, but the responsibility for such expense shall be only that within the contractor's written request. If any of the materials, reports, studies and computer programs provided by the contractor are held to constitute infringement and the use or publication thereof is enjoined in such suit or proceeding, the contractor shall, at its own expense and at its option, either procure the right to publish or discontinue use of such infringing materials, reports, studies or computer programs, replace them with non-infringing items, or so modify them so that they are no longer infringing. The obligations of the contractor under this paragraph continue without time limit.

I-21. NONDISCRIMINATION CLAUSE

The Offeror shall comply with all Local, State and Federal laws prohibiting discrimination in hiring or employment opportunities. In the event of the grantee's noncompliance with the nondiscrimination clause of this Agreement or with any such laws, this Agreement may, after hearing and adjudication, be canceled, terminated or suspended in whole or in part, and the grantee may be declared temporarily ineligible for further Commonwealth agreements, and such other sanctions may be imposed and remedies invoked.

I-22. LIMITED OR NON-AWARD

HSLC reserves the right to not award a contract as a result of this RFP:

1. if it does not receive proposals which, in its judgment, adequately and reasonably address the requirements of this RFP;

2. if, in its judgment, the costs proposed are not in line with benefits to be received; or

3. if sufficient funds are not available.

HSLC reserves the right to make one or more awards, either in whole or in part, and reserves the right to enter into negotiation, with one or more Offerors, to close the gap between what is requested and what is offered.

I-23. TIMELINE

September 8, 2017	RFP Open Period Begins
September 30, 2017	Proposal Deadline
October 1 -31, 2017	Proposal Review, Evaluation, Product Demonstrations
November 1, 2017	Proposal Decision Announced
November 30, 2017	Negotiation of Contract Concludes
December - January	Implementation Period, including Training
	Online (Live Webinar or Self-paced) and/or In-person
February 2018	Go Live

Offeror is to supply a timeline for tasks associated with migration, implementation and launch of the new system(s).

PART II

INFORMATION REQUIRED

Proposals must be submitted in the format outlined below. To be considered, the proposal must respond to all requirements in this part and Part IV of the RFP. Use the RFP section numbers in your responses. Any other information thought to be relevant, but not applicable to the enumerated categories, should be provided as an appendix to the proposal.

II-1. UNDERSTANDING OF PROJECT SCOPE

State in succinct terms your understanding of the products and services required by this RFP.

II-2. MANAGEMENT SUMMARY

Include a short, one page or less, narrative description of the system, services, and products to be provided by the Offeror.

II-3. WORK PLAN

Describe in narrative form a technical plan for providing the statewide library chat service software and/or staffing, providing a proposal that is complete and comprehensive with emphasis on being clear and concise. Use the Detailed Work Statement in Part IV of this RFP to provide the detail that accompanies your narrative. Provide a table of contents.

II-4. PRIOR EXPERIENCE

Include your company's experience at developing similar systems of similar scope for a minimum of three years. Experience shown should include work done by individuals who will be assigned to this project as well as that of your company. Studies or projects referred to should be identified with the name of the customer, including the name, address, email address and telephone number of the responsible official of the customer, company, or agency who may be contacted.

II-5. PERSONNEL

Describe work done by individuals who will be assigned to this project, including the specific representative assigned to coordinate this project. Provide general descriptions of the educational background and experience of personnel with whom HSLC will be expected to work on a regular basis.

II-6. COST AND PRICE ANALYSIS

A. All pricing should include unlimited access statewide by residents.

B. Detail all direct and indirect costs associated with this proposal, including any related to scalability of the system(s).

C. Software:
Include a price quote for each software module proposed, including initial licensing and ongoing maintenance and upgrades, describing in detail the basis for pricing. Where there are pricing alternatives, offer and describe each in full. Pricing shall include detailed license costs associated with providing multiple levels of individual library staffing accounts. **Any pricing for custom development, optional, and/or add-on services or products is to be clearly identified.**

D. Staffing:
Include a price quote for staffing to provide 1) 24/7/365 coverage and 2) 9 AM to 9 PM coverage, 7 days per week. Pennsylvania typically provides 2-5 staff between the hours of 9 a.m. – 5 p.m. Additional staff are needed during that time, as well as when no Pennsylvania staff are available. Cost should indicate how many additional staff will be available on an hourly basis, by day of week. (Appendix C provides statistics.)

E. Describe costs associated with providing at least one representative to present training sessions and to supply training documentation for all participating libraries.

F. The information requested in this section is required to support the reasonableness of your quotation and is for internal HSLC use only. Submit maintenance costs for the initial year, year two, year three, year four, year five, and then a total for all five (5) years.

G. Vendor shall agree to an invoice period matching fiscal year October 1 – September 30.

H. Vendor shall pro-rate Year One costs based on contract notice to proceed, estimated on or after November 30, 2017, including payments associated with milestones during implementation.

I. Vendor shall propose flexible payment schedules, such as quarterly or semi-annual billings for licenses and/or maintenance.

J. Vendor shall describe any discounts extended to POWER Library/Access Pennsylvania participant libraries for other products or services the company offers.

PART III

CRITERIA FOR SELECTION

III-1. REVIEW PROCESS

All proposals received will be reviewed and evaluated by a committee of qualified individuals as selected by HSLC. This committee will recommend for selection the proposal that most closely meets the requirements of the RFP.

III-2. CRITERIA

The following criteria will be used in evaluation of proposals. Criteria will reflect the underlying principles expressed in Section I – General Information.

   A. Understanding the Requirements

       1. Proposal adequately demonstrates the ability to provide:

           a. A system that can be managed at the collaborative administrative and local
               administrative level.
           b. Ability to locally brand the patron and staff interface
           c. Ability to customize the user interface with social networking integration
           d. Compatibility with a wide range of infrastructure environments and platforms
           e. Availability to a large number of simultaneous users
           f. Capacity to handle the projected demand of simultaneous users
           g. Availability of software or support for non-English speaking populations is not required,
               but desired (Please describe any products or support for non-English speaking
               populations)

   B. System Support

       1. Proposal adequately demonstrates the ability to provide:
           a. A flexible and realistic migration/implementation timeline
           b. Quality training and documentation
           c. Availability of useful management reports
           d. Time frame during which technical support is available
           e. Level of technical support offered

   C. Contractor Qualifications

       This refers to the ability of the contractor to meet all terms of the RFP, including client satisfaction with similar projects, as evidenced by contractor's references, contractor's longevity, and financial ability to undertake the project.

D. Personnel Qualifications

This refers to the competence of professional personnel who will be assigned to the implementation by the contractor, as detailed in II-5. Qualifications will be measured by the extent of education and experience relevant to the project, such as experience providing training or experience in working with established library standards, formats, and products.

E. Soundness of Approach

Emphasis here is on the technical approach for providing a shared system of the size and scope specified, for providing a complete range and functionality of library system modules, and for managing the services provided. Of equal importance is whether the approach is completely responsive to all the written specifications and requirements contained in the RFP.

F. Cost

While Cost will be weighted heavily, it will not be the sole deciding factor in the selection process.

PART IV

DETAILED WORK STATEMENT

IV-1. GENERAL REQUIREMENTS

    A. Your company must have a minimum of three (3) years' experience/existence as a corporate entity (current corporate entity or predecessor[s]) providing chat software and/or at least (2) years' experience providing staffing support. Confirm compliance with this condition.

    B. Your company must have the ability to provide a statewide live chat system, accommodating no less than 75 simultaneous users inclusive of both patrons and staff.

    C. Provide three - five customer references (name, institution, and phone number). If possible, it is preferred that the references include current statewide or large collaborative chat services.

IV-2. OBJECTIVE: HSLC wishes to procure the following live chat reference system (A) and staffing (B):

Vendor should describe the extent to which the software offers the functionality listed below. Indicate which features are available now, and which are in development. If in development, indicate the timeline to full functionality. Vendor should provide access to a live demonstration website or otherwise provide a mechanism for verification of functionality and other claims made in this proposal.

IV-3. SYSTEM REQUIREMENTS

Respondents shall be expected to comply with the following requirements under the current environment. Chat with a Librarian is collaborative, live chat reference service managed by HSLC staff with approximately 35 participating institutions as of 2017. It should be noted that while 35 institutions currently log in to staff the service, a larger number of libraries will be sought for program staffing. The service is available to all residents of Pennsylvania that wish to use the service as a patron. In addition to live chat reference, some institutions also use the software to provide local email reference and sms/text reference.

With regard to the software environment, Offerors should respond to the System Requirements section allowing for the following: The software should enable the service to have a rollover effect with regard to both administrative management and live chat queuing. For administrative management, "collaborative administration" referenced in the System Requirements section refers to HSLC staff. Collaborative administration should have the ability to run system-wide reports, create system-wide scripts, add/remove new users to any institution, review transcripts for any institution, etc. For live chat queuing, chat staff should be able to select a variety of queues to monitor, whether responding to local or statewide chat sessions.

For Section A, "Software – Operator – User Interface," Vendor should describe the extent to which the software offers the functionality listed below. Vendor should provide access to a live demonstration website or otherwise provide a mechanism for verification of functionality and other claims made in this proposal. In the case of functionality described, note the ability to comply using these terms:

In general release – now available

In test – provide the anticipated date available

In development – provide the anticipated date available

In planning – provide the anticipated date available

Custom development necessary – provide the cost and anticipated schedule for completion

Vendors responding to IV-4 B only, (Staffing): Respond to the entire RFP with the exception of IV-4 A.

IV-4 A. Software / Operator / User Interface

1. Specify the platform(s) (Windows, Macintosh, UNIX, mobile, etc.) and versions under which the interface operates.

2. HSLC desires the ability to customize the interface to be similar in appearance to the powerlibrary.org portal; a proprietary interface that discourages or eliminates customization is not favored. Please describe the options for customizing the interface.

3. Explain advantages your product has for operating on external websites; i.e., by utilizing widgets or other embeddable objects.

4. System shall be web-based and include SSL protection for personal data.

5. Frequency of software release upgrades shall be specified, including typical scheduled downtime to be expected.

6. Plug-in or Download
   If a plug-in or download is required on the part of the patron in order to use any portion of the service, vendor should describe that process in full. Any installation on the patron's computer, no matter how small or unobtrusive, is considered a download. Downloads are strongly discouraged, but are acceptable if necessary in order to access full functionality. Those which require negligible effort on the part of the patron are preferred.

7. Browser/System Compatibility
   Vendor should indicate any platforms that are not supported (e.g. PC vs. Mac users, Android vs. iPhone). Platforms should be considered from the point of view of both the staff providing the reference service, and the patron using that service. Indicate any known issues with accessing this software using various Web browsers and versions of those browsers.

8. Software Administration
The current collaborative reference service consists of two levels of administration; local and statewide. HSLC administers the statewide interface, and individual libraries that staff the service manage local library accounts via a local interface. Vendor should describe and demonstrate experience in providing software and support in this environment. It is anticipated that the system should start with 38 administrative interfaces, and price room for growth. Initial configuration shall include:
- 35 local administrative systems for individual libraries
- 2 administrative statewide collaborative systems; one for public libraries and one for academic libraries
- 1 training system
Alternate methods for managing the above should be fully detailed.

9. Local Information Page
The current system offers functionality that includes local library information similar to an FAQ, with hours, policies, locations, special alerts, etc. This information is vital to conducting chat sessions with the patrons of that institution. Does your product offer a similar feature? If so, please describe how the feature is built, edited and accessed by chat staff during live chat sessions.

10. Patron Login
Describe the method by which a patron logs on to the service. Describe how an operator is notified that a patron has initiated a session. Describe how your software may be customized to require more, or less, information about the patron during the login process. Indicate how the patron is identified to the operator; for example, does the operator see the URL from which the patron accessed the service, the patron's IP address, or other identifier?

11. Accessibility
Describe how your software may be configured to make it accessible to patrons with disabilities, and its specific compliance with Section 508 accessibility standards. For example, describe the ability for the patron to manipulate the patron interface to adjust the font face, size, browser background color, etc.

12. Question Management
Describe how your software manages incoming chat, email and texting queries.

13. Widget and Proactive Chat
Does your product offer any widgets that can be deployed within external websites? If so, please describe the widget(s), customizability of said widget, etc. Does your software offer any proactive chat tools for point-of-need service?

14. Email Reference

Does your product offer the ability for institutions to offer reference via email? Is reference via email available at the individual institution level, collaborative level, etc.? Vendor should describe any email reference functionality in full, including the process for building the form/link and options for making it available on the statewide or institution's website.

15. SMS/Texting

Does your product offer texting, and if so, is it a component of the product or does it require an outside Vendor? Is texting available at the individual institution level, collaborative level, etc.? Vendor should describe any texting functionality in full.

16. Chat Staff Login

Describe the process for staff to login and how they identify which queues they are covering.

17. Queue Management

Software should have queue waiting if more than one customer is trying to log in, and/or the ability to handle more than one queue. If live service is not available, or if queue is too long, software should offer the option for the patron to select another method (e.g. email) to ask their question. Does your software provide a reply with estimated Wait Time when a staff person is not immediately available? The operator providing the reference service should also provide options for managing the queue, such as forwarding the waiting patron to another librarian, or suggesting that they ask their question via email or another method.

18. Simultaneous Staffing

This software will be used in two ways: by individual libraries to offer local live reference assistance specifically to their patrons, and in a statewide, collaborative service where the librarian and the patron may be from completely different library systems. In either of these environments, your software should provide the option for multiple librarians to staff the service at the same time. A library might also decide to staff both sides of the service at the same time. Describe how your software may be configured to offer these two complementary, but separate, services in a seamless environment.

19. Live Chat Staff Monitoring

Describe how your software enables chat staff and/or collaborative administration to monitor live chat sessions in progress.

20. Seamless Transitioning

Describe the capability of your software to seamlessly transition from live chat to email reference, so that staff can have the option to route live questions for follow up at a later time. Staff should have the option to forward a live question to another librarian/institution, within or outside the service.

21. Scripted Responses
   Describe the ability to create "canned" or "scripted" responses to patron inquiries, either as part of the general communication (welcome, introduction, goodbye, etc.) or as an answer to a specific question. Additionally, can collaborative administrators (i.e. HSLC staff) globally create and deploy scripted responses across the entire system for each staff account?

22. File Sharing
   A file sharing feature allows staff to send screen shots or files to the patron and vice versa. This might include computer files (documents, slide shows, spreadsheets, etc.) Describe how your software allows for such bi-directional file sharing on the part of the patron or staff.

23. Transcripts
   Describe your software's capability to capture logs or transcripts of reference sessions, including the ability to send those transcripts to the patron or another party. Describe where the transcripts are saved, and who has access to those files and for how long. If the option to save or discard a transcript is made by the patron, describe that process. Describe the options for maintaining transcripts in the system. Additionally, is it possible to perform keyword or other searches of the transcripts?

24. Descriptive Codes
   Describe your software's capability for enabling staff to assign descriptive codes to the system and note at which points this action can be performed; e.g. when ending live chat sessions, post-chat review, etc. Can custom descriptive codes be created by staff?

25. Training Module/Functionality
   The selected system will include training functionality or a module to be used for in-person or self-paced training by Pennsylvania librarians.

26. Statistics
   Vendor should provide detailed description of the statistics that are generated, gathered, and compiled by the software. Vendor should indicate to what extent the software may be modified to change the statistics gathered. Vendor should describe available statistics for both institutional and collaborative administrative accounts. Describe the method by which statistics are extracted from the program, including any specialized statistics interface. Describe any reports generated by your software, and report formats available.

27. Patron Surveys
   Does your software provide functionality that offers a survey to patrons at the conclusion of their interaction? Is the survey content customizable by the Customer? Does your report system capture survey response data for analysis by the Customer?

28. Other Functionality

Describe any other features, options, or services not addressed elsewhere in this document. Examples include streaming video and voice-over-IP, but the Vendor may describe any additional functionality here.

IV-4 B.   Staffing

1. HSLC seeks staffing costs for both of the following options:
(For both options, please describe the number of staff that will be available by hour of day, options for how long staff wait to pick up patrons, etc. Please see Appendix C, which provides statistical data that may prove useful in preparing responses.)

    a.   24/7/365
    For this option, staffing is required at all times, including holidays.

    b.   9 AM to 9 PM, 7 days per week
    While the current service is available 24/7/365, HSLC may consider alternate service hours and seeks costs for staffing that is available from 9 AM to 9 PM, 7 days per week.

2. Please describe the minimum credentials for staff who will interact directly with patrons.

3. If responding to staffing only, please indicate which software products (Vendor name and product name) that your staffing can support.

IV-4 C. Implementation and Training

1. Provide a proposed implementation timeline for the project. This should include an overall timeline for the entire project (assumed to take place over a period of 1.5 - 2 months).

2. Document, in detail, the training that will be available for HSLC and library staff to learn how to use and support the systems. Also indicate any available interactive self-training materials. List each course, its length, and the intended audience. Provide a detailed diagram of your proposed training program, keyed to a point in time during the installation schedule. Include the costs for the training in the separate Cost section of your proposal. Include costs for both in-person and online training.

3. What provisions are there for "train the trainer" programs?

4. Does your company support training via videoconferencing?

5. Provide details on the Help capabilities of the system for patrons. How does a user request help? How extensive is the help available? How easy is it to use? Give examples.

6. What online tutorials are proposed for patrons?

IV-4 D. Documentation – Provide copies of all documentation for the proposed system

IV-4 E. Administration and Management

1. Describe the type of activity report(s) your system can generate. Show examples.

2. Indicate whether reports are available by location, from global reports down to participant library level.

3. Indicate compatibility with Google Analytics or other forms of statistical report systems for gathering usage data.

IV-4 F. Performance

1. Indicate your system's anticipated and guaranteed up-time. Spell out the guarantees in detail, including any penalties imposed should these not be met.

2. Provide details on redundancy of the system, including whether a backup system can be deployed in the event that the primary system goes down.

3. Does the operation of the report generator adversely impact performance on live operations of the system?

4. Provide examples of how your company maximizes system up-time, citing current customers.

IV-4 G. Upgrades

1. Indicate the typical process for development of new functionality and number of expected improvement releases per year.

2. Provide the process for submitting and implementing enhancement requests to system functionality.

3. Provide any information available on national user groups for the proposed system.

IV-4 H. Support and Maintenance

1. Speed, reliability and customer service are of utmost importance in this type of application. If software is hosted or installed remotely, Vendor should supply evidence of product response time and system availability. Vendor should provide a copy of their standard Service Level Agreement, guaranteeing level of system availability, if such a document exists.

2. Detail here your problem resolution program. During what hours is support available? How do you charge for support outside of normal business hours? How responsive will the support be,

and will you put this in a contract? What means are used to access support (e.g. toll-free telephone, e-mail, web page, online help desk, etc.? Be sure to detail costs as part of Section II-6 of the proposal.

IV-4 I.   Security and Backup of Data

1.   Describe security levels and password protection employed to restrict access to records or functions.

2.   Confirm where deployment of SSL or HTTPS secure transactions occur in your system.

3.   Define what operating system updates and patches are to be performed by HSLC vs. your company.

4.   The system must provide for continuous backup of all transactions, so that completed transactions are not lost.

5.   Define the period of time system data is retained.

6.   Confirm whether all or parts of the system continue to be available for access during the backup procedure.

IV-4 J.   COPYRIGHT

1.   HSLC operates as a contractor for the PA Department of Education, and the Office of Commonwealth Libraries, which holds copyright to all work developed by HSLC. Offerors are to clearly indicate what software and products are the exclusive copyright of the company.

APPENDIX A
Intent to Respond Form

REQUIRED: All proposers are required to complete and **email** this form to **phillips@hslc.org** in order for their proposal to be eligible for consideration. Please note if you will respond to Software, Staffing or both. (Your selection does not prevent your company from submitting a different proposal.)

DEADLINE: Thursday, September 29, 2017 - 4:00 P.M. Eastern Daylight Time

In compliance with the requirements of the Hosting Solutions & Library Consulting's RFP for statewide live chat reference software and staffing, the following individual or business is hereby indicating intent to submit a proposal:

Company

Name

Address

Address (City, State, Zip)

Email Address

Responding to: ___ Software   ___ Staffing   ___Software & Staffing

Representative for all Communication related to the proposal:

Name

Title

Phone Number

Email Address

Email all questions and communication regarding this RFP to:
Maryam Phillips, Executive Director
phillips@hslc.org
(Use Return Receipt to confirm delivery)

APPENDIX B

SAMPLE CONTRACT
SERVICE LEVEL AGREEMENT

Include your sample contract and/or SLA here.

APPENDIX C

STATISTICS

Sessions Per Year
2007 - 2016
(Full Calendar Years Available)

Average Number of Sessions Per Hour