CITY OF TAKOMA PARK, MARYLAND

REQUEST FOR PROPOSALS
FOR AN INTEGRATED LIBRARY SYSTEM ("ILS")
(RFP #LIB-2014-11-10 Library ILS)

RFP Issuance Date: November 10, 2014

Proposal Submission Deadline: Monday, December 8, 2014 at 3:30 PM

Inquiries: Rebecca Brown
                                  Coordinator of Public Services
                                  Takoma Park Library
                                  101 Philadelphia Ave.
                                  Takoma Park, MD 20912
                                  rebeccab@takomaparkmd.gov
                                  301.891.7250

PURPOSE

The City of Takoma Park, Library Department, is accepting bids for an Integrated Library System. We are looking for an ILS that is well designed and intuitive for patrons and staff. We want customer service, when needed, to be timely and helpful. We expect reports and receipts to be informative and accurate. We want to work with the vendor to keep our system up-to-date and working in a way that best serves our public.

ESTIMATED SCHEDULE

Issuance of Request for Proposal:	Monday, November 10, 2014, 3:30 pm
Proposal due date:	Monday, December 8, 2014, 3:30 pm
Technical Evaluation Period:	December 9, 2014-January 2, 2015.
City Council Proposal Award:	January 2015
Estimated "Go Live" Date:	May 1, 2015
Completion of migration, training, and implementation	May 30, 2015

INTRODUCTION

The Takoma Park Maryland Library is the only small, municipal library in the State of Maryland. The library is a department of the City of Takoma Park.

The library has been running a Verso ILS system since 1998. We were one of the first libraries to use the software when it was designed by the Maxcess Corporation, and continued using the product when it was acquired by Autographics. We do not use the acquisitions, serials, or cataloging modules. We do our cataloging using The Library Corporation's BiblioFile system.

We are a stand-alone library; we have no branches

Number of item records:	70,877 (as of May 28th, 2014)
Number of serials:	167
Number of card holders:	34,328 (since 1998)
City population:	16,715 (2010 census)
Library employees (FTE):	10.90
Number of staff stations at the circulation desk:	3
Open:	Seven days/week for a total of 58 hours.

SCOPE OF SERVICES

The City of Takoma Park's Library is soliciting bids to replace its current Integrated Library System. The new system will be hosted remotely by the vendor.

1. Data Migration: all patron and library holdings information, as well as current

circulation statuses, must be transferred from the current server, which is located on City premises, to the bidder's remote hosting facility without loss of information or significant interruptions of public service.

2. Required Features:
    a) secure hosting of our library's patron and catalog databases;
    b) software supporting all normal library circulation and reporting functions; and
    c) remote patron access to personal accounts and the catalog.
[Acquisitions and serials module are not required at this time.]

3. Training Requirements:
Library staff will need initial training, either web based or onsite. We expect some retraining if features are modified in subsequent upgrades. Proposed methods of staff training and any associated costs must be clearly defined in the proposal

4 Support:
    a. The vendor must provide a working system 7 days/week during all open library hours.
    b. Technical assistance should be available in a timely fashion if we encounter problems.

5 Security
The system must be robust, with backup and redundancy features in place.

PAYMENT SCHEDULE
The City will pay a percentage of the implementation and first year costs at the initiation of the project, and the remainder when the system goes live. We understand that the expected proportions vary from vendor to vendor, and the hosting and training charges may be billed separately. Therefore, vendors should supply a payment schedule.

PROPOSAL SUBMITTAL REQUIREMENTS
All proposals should contain:
1. Brief narrative descriptions of the software and services, and answers to specific questions concerning software features and support (*see* attachment B).
2. Contact Information (*see* attachment C).
3. Price Schedule including the costs of migration, both required

and optional modules, and costs for the year following the year of service (*see* attachment D).

4. Reference List, providing perception statistics and three references with current contact details (*see* attachment E)
5. Qualification and Certification Statement   (*see* attachment F).
6. Certification of Non-Involvement in the Nuclear Weapons Industry and Living Wage Requirements Certification (*see* attachments G and H)
7. Metropolitan Council of Governments Rider Clause (*see* attachment J).

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Prior to commencement of the work, the selected vendor shall provide the certification of insurance. The City reserves the right to disregard any incomplete proposal responses. Failure to provide any of the required certifications will result in the cancellation of any contract.

Requests for extensions of the date and time for proposal submission will not be granted and no late proposals or late request for modifications will be considered.

Responses to this Request for Proposals must be sealed, clearly labeled "**Sealed Proposal/RFP # LIB-2014-11-10 Library ILS**" and received by 3:30 p.m. on Monday, December 8, 2014, with a title page/cover letter on the vendor's business stationery. The purpose of this letter is to provide a record of the transmittal of the proposal and an acknowledgement of any amendments, addendums, and changes to the RFP. The letter should be signed by an individual who is authorized to commit the respondent to the services and requirements stated in this RFP. In addition, the attached Qualification and Certification Statement must be completed and included with the proposal.

Proposals shall be mailed or delivered and e-mailed as follows:

Please submit two physical copies of
the proposal to:
Ellen Arnold-Robins,
Library Director,
Takoma Park Maryland Library
101 Philadelphia Avenue
Takoma Park, MD 20912
Phone: 301-891-7259

Fax: 301-270-80814

An electronic copy should be emailed to:

Ellen Arnold-Robbins ellenr@takomaparkmd.gov

The email subject line shall read "**RFP LIB-2014-11-10 Library ILS**" The proposal document shall be a single PDF attachment.

A confirmation email will be sent within 24 hours of the receipt of a proposal email. If no confirmation is received within that time frame or before the proposal submission deadline date and time, please contact Ellen Arnold Robbins at 301.891.7258 or ellenr@takomaparkmd.gov to confirm that the proposal was received.

EVALUATION AND SELECTION PROCESS

The award will be made on the basis of a recommendation made by an evaluation panel comprised of City staff and must be authorized by formal action of the City Council.

Software performance, reliability, and ability to support standard library procedures is vital to the efficiency and effectiveness of the City of Takoma Park's Library. While cost is a factor in this project, it is not the sole deciding factor as the City is seeking to purchase the most reliable and useful product, at the best value.

Proposals will be evaluated and scored on the following criteria:

Pricing	40%
References and Ratings	25%
Experience of the Vendor	10%
System Features	25%

APPENDICES

A: CITY OF TAKOMA PARK, MARYLAND GENERAL CONDITIONS

The General Conditions set out below shall apply to all formal solicitations and competitive bid or proposal process of the City of Takoma Park, Maryland. Proposers are responsible for informing themselves of these requirements prior to submission of proposals. The term "bid" and "bidder" as used in these General Conditions shall include the term "proposal" and "vendor," "offeror" or "respondent." The term "Request for Proposals" as used in these General Conditions shall include "Request for Bids," "Invitation for Bids," and "Requests for Qualifications"

1. Receipt of Proposals

Proposals or amendments received after the date and time specified as the proposal due date will not be considered. No liability shall attach to the City for the premature opening of an improperly addressed or improperly identified proposal.

2. Proposal Due Date

a. Monday, December 1 , 2014 at 3:30 p.m. EST
b. Unless otherwise specified by the City, all proposals submitted may not be withdrawn after bid opening and shall be binding for City acceptance for ninety (90) days from the proposal due date.

3. Award or Rejection of Proposals

a. A contract shall be awarded to a responsive and responsible bidder. The City reserves the right, in its sole discretion, to:
   i.   accept a proposal in part or as a whole;
   ii. reject any or all proposals;
   iii. re-advertise the Request for Proposals;
   iv. waive any required information or any technical or formal defect in a proposal;
   v.   select a proposal and make a contract award which best serves the most effective and efficient performance of the contract services and the interests of the City;

vi.   reject any and all proposals that comply with the Request for Proposals specifications;

vii.   elect not to proceed with the process set forth in the Request for Proposals; or

viii. accept a higher proposal that complies with the Request for Proposals specifications, provided that, in the judgment of the City, the services or items offered under the higher proposal have additional values or functions justifying the difference in price.

b. City reserves the right to independently investigate or request clarification of the contents of any proposal, including requesting that the bidder provide additional information or make one or more presentations. The City also has the right to personally interview bidders and to inspect the bidder's place of business, inventory, supplies and equipment prior to making a contract award.

c. The City also reserves the right, in its sole discretion, to reject the proposal of a bidder who has previously failed to satisfactorily perform or to timely complete a contract of a similar nature (whether for the City or for a different jurisdiction or entity) or a proposal of a bidder who, upon investigation, is not in position to perform the contract.

d. A written notice of the contract award (or acceptance of the bid) will be provided to the successful bidder within the specified acceptance period. The successful bidder will be expected to sign a City contract.

e. Specific requirements as to bid bonds shall be incorporated in individual proposal specifications, if required. Although performance and/or payment bonds may be directly addressed in the specifications, the City reserves the right to require a performance and/or payment bond if the City deems it to be in the City's best interests to require a performance and /or payment bond at the time of award or upon execution of the City contract.

4. Payment
Invoices for payment for contract services must be submitted in duplicate. An original

invoice and one copy shall be forwarded to the City. Payment will be made upon the City's acceptance of the services or items represented by the invoice. Payment terms are net 30 unless special arrangements have been established.

5. Taxes

Prices proposed under any bid shall not include federal, state or local sales or use taxes. The City of Takoma Park is exempt from such taxes; however, the City's contractors or vendors are not agents and/or employees of the City.

6. Subcontractors

a. Bidders may not assign or sublet the contract services or any part thereof without the prior written consent of the City Manager, or his or her duly appointed representative. Bidders must request approval in writing for any such assignment or subcontracting, including the name of such assignee or subcontractor(s) he or she intends to use, the specific services or materials to be furnished by such assignee or subcontractor, the assignee or subcontractor's place of business, and other information as the City Manager may require.

b. Bidders shall not legally or equitably assign any of the monies payable under the contract, or its claim thereto, unless by and with the prior written consent of the City Manager.

7. Compliance with Specifications

Bidders should address and clearly satisfy the requirements of this Request for Proposals. Failure to clearly respond to the requirements of the Request for Proposals may result in the bid or proposal as not being responsive. Bidders shall abide by and comply with the true intent of the specifications of this Request for Proposals and not take advantage of any unintentional error or omission.

8. Changes in Specifications

If it becomes necessary to revise or alter any part of this RFP, addenda will be provided on the City website during the proposal period. It is the responsibility of bidders to check the City website for any addenda. All such addenda and changes shall be deemed a part of this RFP and shall become part of the information contained in the RFP as originally issued.

9. Bidder's Certification of Noninvolvement in the Nuclear Weapons Industry

In order to comply with the provisions of Takoma Park Code Chapter 14.04, Nuclear - Free Zone, section 14.04.060.C, bidders must certify, by a notarized statement, that the bidder is not knowingly or intentionally a nuclear weapons producer.

10. Living Wage Requirement

This Request for Proposals is subject to the City of Takoma Park's living wage requirement for service contracts. The "Living Wage Requirements Certification" must be completed and submitted with the proposal. If a bidder fails to submit and complete the required material information on the Living Wage Requirements Certification, then the proposal is unacceptable under City of Takoma Park law and will be rejected. The current mandatory living wage rate, payable by a contractor to employees under the City's living wage law, is $14.15 per hour through June 30, 2015 . The living wage rate is adjusted as of July 1 of each year to reflect the most current Montgomery County living wage rate and shall be applicable to any contract awarded thereafter until the date of the next adjustment. Notice of adjustments to the living wage rate can be found on the City's website (www.takomaparkmd.gov). Also, the City's living wage law

– Takoma Park Code section 7.08.180 *et. seq.* is available at the same website (click on Code).

11. Conflict of Interest

The bidder will be required to warrant and represent that no employee or official of the City, or his or her immediate family member, is directly or indirectly interested in the proposal or will share in or benefit from any contract that results from the proposal.

12. Brokerage Fees, Commissions, Contingency Fees, and Other Compensation:

a. No brokerage fees, finder's fees, commissions, or other compensation or consideration will be payable by the City in connection with the award of a contract under the proposal. The City will not pay any costs or losses incurred by a bidder including, but not limited to, any costs incurred to respond to this Request for Proposals, any requests for supplemental information made by the City, or for actions by the bidder in connection with any negotiations, including, but not limited to, actions to comply with the requirements of the City.

b. The bidder warrants that no member of the bidder's firm has employed or retained any representative, individual, or firm, other than a bona fide employee working solely for the bidder firm, to solicit or secure any contracts hereunder and further warrants that there has not been any payment or promise or agreement to pay anyone a fee, commission, percentage, gift or any other consideration contingent upon or resulting from the award of a contract under the proposal.

13. Indemnification and Insurance
   a. The commencement of any negotiation does not represent any obligation or agreement on the part of the City. No bid or proposal shall be deemed accepted until authorized by the City Council and a contract or purchase order between the City and the bidder is executed. Either the City or the bidder may terminate negotiations at any time with or without cause. If negotiations are terminated by either party, neither the City nor the bidder will have any rights against or liabilities to the other party.
   b. The selected bidder is responsible for any loss, personal injury, death, property damages, and any other damages of every name and description that may be done or suffered by reason of the bidder's negligence or failure to perform any contractual obligations.
   c. The selected bidder shall defend, indemnify, and hold harmless the City of Takoma Park, its employees, officials, and agents, from and against all losses, liabilities, claims, demands, damages, suits, costs, and expenses of any kind, including attorney's fees and litigation expenses, whether for personal injury, property damage or other liability arising out of or in any way connected with the bidder's acts or omissions under the Request for Proposals or under any contract resulting from the Request for proposals.
   d. The selected bidder must obtain at its own cost and expense, and keep in force and effect during the term of any contract with the City for the contract work, including all extensions and renewals, the insurance specified below, with an insurance company licensed or qualified to do business in the state of Maryland. A certificate of insurance must be submitted to the City prior to the commencement of any work under the contract and prior to any contract modification extending the term of the contract, as evidence of compliance with this provision. The City of Takoma Park must be named as an additional insured on all liability policies. A minimum of thirty (30) days

written notice to the City of cancellation or material change in any of the policies is required. In no event may the insurance coverage be less than that shown below, unless the requirements of this section are waived, in whole or in part, in writing by the City Manager.

Coverage Amount or Limits:
Workers Compensation (for bidders with employees)
Bodily injury by Accident(each) $100,000.00
Disease (policy limits) $500,000.00
Disease (each employee) $100,000.00
Commercial General Liability $1,000,000.00
(Minimum combined single limit for bodily injury and property damage per occurrence, including contractual liability, premises and operations, and independent contractors.) Minimum Automobile Liability (Including owned, hired and non-owned automobiles.)
Bodily injury, each person $500,000.00
Bodily injury, each occurrence $1,000,000.00
Property damage, each occurrence $300,000.00

Professional Liability (for professional services contracts only)

For errors, omissions, and negligent acts, per claim and Aggregate, with one year discovery period and maximum deductible of $25,000.00 $1,000,000.00

14. Changes
   a. The City may, at any time, by written order, make changes to the Scope of Services as set forth in the Request for Proposals. If such changes cause an increase or decrease in the bidder's cost or time required for performance of any project service, an equitable adjustment, if applicable, may be made and the parties' contract modified in writing accordingly.
   b. Any claim of the bidder for adjustment under this clause must be asserted in writing within fourteen (14) days from the date of receipt, by the bidder, of the notification of the change order, unless the City grants a further period of time.
   c. No service for which additional compensation will be charged by the bidder shall be furnished without the written authorization of the City.

B: QUESTIONS CONCERNING SERVICES AND FEATURES

I. General Information

Please supply brief answers to the following questions:

1. Provide a brief narrative about your company, your approach to the project, and your approach to customer service.

2. Please provide a brief statement of your company's experience and qualifications. Include a general overview and history of your company, investor or ownership information, number of years in business, number of employees, and names of key executives.

3. Has your company been involved in a merger, acquisition, or reorganization in the last five years?

4. Detail your firm's experience in providing integrated library services (ILS) for at least three similar customers, with project dates, customer name, contact person, email address, and telephone number(s).

5. How many customers are currently running versions of your ILS? (If open source, how many are using the product with your support services?)

6. What sizes and kind of libraries make up your customer base?

7. Over the last 12 months indicate how many new clients you have contracted with?

8. What are your rankings on the 2013 Library Technology Guide surveys, on customer support, features, and general satisfaction. How many libraries contributed to your ratings? (You can answer using the references document, see attachment E.)

9. What are your procedures for reporting and resolving issues?

10. What type of support access (email, phone, company website) do you provide?

11. What is the availability of support? Are weekends included?

12. Is upgrade support included in annual maintenance fees? Are all general release software updates, upgrades, uplifts, enhancements or bug fixes provided free of charge?

13. How are upgrades implemented? How much system downtime is typical for an upgrade? Can you schedule upgrades when our library is closed? Does this involve an extra charge?

14. What is your pricing model?

15. Please describe your server hosting facility. Do you have any redundancies in place for the systems?

16. What are your backup and disaster recovery plans?

17. Does the system check each user's access privileges at login, and automatically disable or enable functions (in real time) accordingly?

18. Does a single web based client support various staff operations, including circulation, cataloging, acquisitions, serials control, report generation, policy setup and management?

19. Do you have any enhancements currently under development?

20. Do you track all bugs and other problems reported by the Library? Can the library view all incidents (including open and closed) via your tracking system?

21. Could we download our patron and catalog databases to back-up occasionally? Is there an extra charge if we want to remove our data?

II. Initial Migration

1. At the point of migration, could you populate empty fields, for example, missing prices, with data? Update deprecated tracings?

2. What are the library and IT staff resources required to support the migration and Implementation?

3. What is your estimated migration and implementation timeline for a project of this size and complexity.

4. What data, if any, cannot be migrated to your solution from the Autographics product?

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III. Training

The library staff needs to know how to efficiently and correctly use the system.

1. Do you offer initial web based training for staff?

2. Do you offer onsite training? If so, what is the additional cost?

3. Are training videos available to new staff members?

4. When the software is modified, do you offer webinars or training videos for staff?

5. Do you have someone available to answer questions when we need help? During which hours? Which days?

IV. Integration with Products from Other Vendors

1. Do you offer SIP2 access? Is there any additional charge?

2. Have you any experience setting up SIP2 access:
   a) For Freading?
   b) For Userful?
   c) For other vendors?

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PART 2: ILS Functionality Checklist

INSTRUCTIONS:

Complete the following ILS System checklist electronically, so you may add as much comment space as you require.

Vendor's responses must be in the same order in which questions appear in this RFP, and must use the same numbering scheme used in this RFP. Specify any additional costs associated with options.

The absence of a response will be scored as if the vendor cannot meet that requirement of that specification.

Please indicate the availability of a specification. Choices for the specification are as follows:

A = Available -- Vendor currently supplies this capability as a part of a general software release.

D = In Development -- Testing and release planned within 2 years from the due date of this RFP. Indicate the expected date for general release. An explanation of how the specification might otherwise be met using alternative features, functions, products, or services available from the Vendor or a third party partner, including availability dates and any added costs, either direct or indirect.

P = Planned -- Capability is planned; no development is underway.

N = Not Available -- Not planned, and no development underway.

S = Substitute -- Vendor's solution does not offer this option because architecture of the solution provides a suitable or superior alternative or renders feature unnecessary.

The use of the word "option" in a specification indicates that the Library should be able to choose whether to implement the feature by turning ON or OFF a system setting. If the feature is available but is not an option, please describe in the Comments section how it works.

V. Circulation

REQ#	REQUIREMENTS MATRIX	CODE:	Comments
		A, D,P,N.S	
1.	Ability to manually block patrons if they violate behavior policies.		
2.	Ability to handle multiple member categories. (Currently these are residents with free access for three years, non-residents who pay for one year of access at a county rate, and non-residents who pay for one year at a higher rate).		
3.	Ability during migration for patrons in our database who have provided e-mail addresses to automatically have notice preference set to e-mail.		
4.	Ability to search fields in the patron account. State briefly under Comments which fields.		
5.	Ability for basic statistics be gleaned on-the-fly from the circulation module. For example, can we tell how many times an item has circulated?		
6.	Ability to perform global "search and replace" operations on a selected group of patron records?		
7.	Ability for staff members to append comments visible only: **a)** To staff? **b)** To staff and patrons?		
8.	Ability to set default values in certain fields. For example, when registering a member, could **Takoma Park** be set to appear every time in the city field?		
9.	Ability for drop-down boxes to be eliminated if there is only one option.		
10.	Ability to offer check out receipts.		
11.	Ability to print fines / fees / payments history for individual members who request that information.		
12.	Ability for library patrons use credit and debit cards to pay fines and fees? Under Comments, state though what system.		
13.	Ability to use "find in page" or **CTRL F** in all modules of the staff client.		
14.	Ability to use standard keyboard commands available (cut & paste) between modules or from an external source in (isbn from vendor or vice versa).		
15.	Ability for staff to change and save preferences: font size, on/off sound alerts, preferred fields to display on certain		

	views, search preferences.		
16.	Ability for staff to set up patron types without vendor intervention.		
17.	Ability to alert for duplicate patron when registering new borrowers: phone number, birth date, name and other identifiers.		
18.	Ability for patrons to self-register for a limited time, and with limited privileges?		
19.	Ability to see from a patron record a summary of the current standing of the patron, including items out, blocks, items overdue, total amount owed, claimed and lost items, holds and ILL requests, both public and staff only notes.		
20.	Ability to: a) record current ILL requests on a patron's record; b) record ILL check-outs?		
21.	Ability to quickly and easily toggle between check-in and check-out?		
22.	Ability to flag an overdue, lost or missing item during check-out and quickly change the status to "Available" and adjust costs without interrupting the checkout process.		
23.	Ability to continue to check-out a patron's other items without re-scanning their library card when one of their items has been flagged as not scanned.		
24.	Ability to automatically flag and halt checkout for blocked patrons: a) with books overdue 42 days or more, or, b) owe $10 or more in fines.		
25.	Ability to set the first check-in of the day to previous day's date (i.e. support batch backdate of check-in, so books collected from the bookdrop in the morning are checked in as the previous day).		
26.	Ability to set closed days globally, as well as irregular closures on the system calendar.		
27.	Ability to adjust fines for unexpected closed days, so as to prevent overdue fines being charged unfairly.		
28.	Ability for checked in item to retain a link to last borrower.		
29.	Ability to support "patrons claims returned".		

30.	Ability to manually change item to:
	  a) Lost
	  b) Missing.		

31.	Ability to store and display a history of overdue notices sent		

	to the patron.		
32.	Ability to provide notices by: a) paper b) email c) texts d) phone.		
33.	Ability for authorized staff to easily modify the entire text of all notices sent to patrons by e-mail or print.		
34.	Ability to print overdue notices only in cases when the patron does not have a working e-mail address.		

35.	Ability to notify patrons of items that are coming due. Briefly state under Comments the means used:
	   a) By weekly status reports.
	   b) A note a few days before the item is due.		

36.	Ability to could occasionally circulate uncatalogued material. Briefly state under Comments how this is done.		
37.	Ability to make global batch changes to patron records.		
38.	Ability for an item on hold that is not picked up, to automatically roll over to the next person waiting.		
39.	Ability to avoid multicopy hold warnings when all holds have been satisfied; i.e. when there are holds on only a few of multiple copies of an item, the remaining copies do not trigger the hold warning at checkout..		
40.	Ability to print a list of hold items not picked up that need to be returned to circulation.		
41.	Ability to choose how partial fine payments are applied; i.e. either by item or by date.		

VI. Public Catalog and Personal Account Access

REQ#	REQUIREMENTS MATRIX	CODE:	Comment
		A, D,P,N.S	
1.	Can your system work with the cover image and review services from Baker&Taylor or Bowker? (Content Cafe or Syndetic Solutions) policies?		
2.	Are both the staff and remote patron screens equally visible and usable in various standard browsers, including: a) Internet Explorer b) Firefox c) Opera d) Safari e) Chrome f) mobile device browsers (ios, Android)		
3.	Are viewers offered the opportunity to filter their results by: a) material type, general collection and the like? b) Are these options easily visible?		
4.	Is that current status of any item visible on the initial results screen (checked out, lost, missing, available and the like)?		
5.	Can drop-down boxes be eliminated if there is only one option? (We don't have branches.)		
6.	From their private account screens, can patrons renew items if they are a collection that allows renewals?		
7.	We do not want patrons to place holds on items that are available on the shelf. Can we restrict holds to checked out or missing items? If not, can we remove the patron's capacity to place holds directly?		
8.	Can cover art be displayed in areas other than the catalog, in various areas of the patron account such holds, items out, fines, overdues?		
9.	Does your system have a separate mobile interface for patrons, or scalable interface?		
10.	Can a patron: a) view his position in a hold queue? b) Cancel or suspend holds?		
11.	Can a patron toggle between regular and large print?		
12.	Do you use a file of commonly misspelled words and alternate spellings to improve patron search results?		
13.	Can a person "virtual shelf browse" within a collection?		
14.	Can staff or patrons print or export to email, or save, a		

	bibliography displaying brief bibliographic records?		

15.	Does your system have a "suggestion for purchase" feature:
	    a) that retains patron's contact information?
	    b) Do these convert to holds if we do purchase an item?		

16.	Can users limit or filter a search by 2 or more parameters; for example, by material type and by author ?		

VII.   Cataloging

REQ#	REQUIREMENTS MATRIX	CODE:	Comment
		A, D,P,N.S	
1.	Can your cataloging module perform Batch record editing?		
2.	Does system allow **e**diting of authority policies?		
3.	Does system add, transfer, and remove copies?		
4.	Does system accept cut, copy and paste commands for MARC record editing?		
5.	Does system allow for Import of MARC record files?		
6.	Does system allow global batch changes for both bibliographic records and item records?		
7.	Does the system provide any label printing utilities?		
8.	Does system update entries in bibliographic records based on authority heading changes? Briefly describe the process under Comment.		
9.	Are entries matched against current LC headings?		
10.	Are updates: a) automatic? b)Is there an additional fee (one time or recurring) for automatic updates?		
11.	When items are withdrawn from the catalog, are fines or fees associated with the items retained? Briefly explain under Comment.		
12.	Can global changes be made to bibliographic records? Briefly explain under Comment.		
13.	Can global editing be performed on every field in a MARC record?		
14.	Briefly explain under Comment, how bibliographic records get deleted.		
15.	Briefly explain under Comment, what elements can be used to identify and delete collections of records in a batch.		
16.	Briefly explain under Comment: a) how electronic resources are handled in your system; b) Do they require the creation of item / copy records to be visible?		
17.	Could we retain deleted records?		

18.	Can we create many items for the same bibliographic record and distribute those items across different collections?		

VIII. Acquisitions

We do not currently use our ILS system to handle acquisitions, but we are interested in the future possibilities.

REQ#	REQUIREMENTS MATRIX	CODE:	Comment
		A, D,P,N.S	
1.	Is there an extra cost for your acquisitions module?		
2.	Does your system work with: a) Brodart? b) Baker&Taylor?		
3.	Briefly explain under Comment, how your system records invoices and payments.		
4.	Does your system support order tracking?		
5.	Can your system manage standing orders?		
6.	Can your system quantify total items ordered and total cost on each order?		
7.	Can the system generate ad-hoc reports for expenditures / encumbrances for a specific budget?		
8.	In the catalog interface, can library members see what is on order and place holds on those items?		

IX. Serials

We circulate only single issues.

REQ#	REQUIREMENTS MATRIX	CODE: A, D,P,N.S	Comment
1.	Under Comment, briefly describe your system functionality.		
2.	Do the catalog and circulation displays show holdings for each subscription?		
3.	Can the fields for printed labels be customized?		
4.	Under Comment, briefly describe how the ILS handles typical tasks associated with serials, such as receiving, check-in, routing, and claiming. Is there a recommended workflow for handling issues?		
5.	Under Comment, briefly explain if there is a recommended workflow for handling issues.		
6.	Can staff create and change publication patterns, chronology displays, and enumeration displays on-the-fly?		
7.	Under Comment, briefly explain what reports, and statistics can be generated: a) from serials records b) Circulation for single copies		
8.	Under Comment, briefly explain how issues identified as not received and claimed from EBSCO are handled		
9.	Could we store: a) subscription dates (start, expiration) b) source (vendors) c) frequency d) subscription price e) claiming information f) retention guidelines		

X. Reporting

The library needs fast and easy access to information about patrons and material usage to make data driven decisions. Please supply brief answers to the questions below under Comments.

REQ#	REQUIREMENTS MATRIX	CODE:	Comments
		A, D,P,N.S	
1.	Under Comment, briefly state the reporting features of your ILS.		
2.	Is the interface easy to use?		
3.	Is the reporting module accessible via any standard web browser?		
4.	Are there limitations to the fields and tables the library has access to for the purpose of generating reports?		
5.	Can staff users define and run reports themselves?		
6.	Can scheduled reports run at a date and time specified by authorized staff?		
7.	Is the database SQL compliant?		
8.	Can 3rd party reporting tools be employed?		
9.	Do you offer data to support trend analysis and collection development?		

C VENDOR CONTACT INFORMATION

Company Name: _____,

Mailing Address: _____,

Web Site: _____,

Federal Tax ID #: _____,

Contact Name: _____,

Title: _____,

Telephone Number: _____,

Fax Number: _____,

E-mail Address: _____,

City of Takoma Park

Integrated Library System

D PRICE SCHEDULE

Format may be vendor modified

Payment Schedule

Percentage due upon initiation of the project _____

Percentage due upon completion of the project _____

Costs due when provided (hosting fees and the like) _____

Costs

Include two schedules, one for the initial migration, training, set-up and first year of service, the second for costs for the following year.   We need SIP2 service and subscription to a cover/review service, either Content Cafe or Syndetics.   Note any optional modules with their costs. Add items as needed.

	Initial Year	Year 2	comments
Data Migration Services			
Implementation Services			
Required Modules: Catalog Circulation Reports Administration			

Mobile Patron Interface			
Hosting Fees			
Staff Training			
SIP2/SIP2/NCIP			
Review/Cover Service			
eCommerce Costs			
Other Costs			
Other functions/modules			
Optional: Acquisitions			
Optional: Serials			

Total First Year (without options)   _____

Total Each Subsequent Year: _____

City of Takoma Park

Integrated Library System

E REFERENCE LIST

Vendors shall furnish a representative list of at least three (3) references involving work as specified in the Request for Proposals. Failure to submit the required information with the Proposal may be cause for rejection of the Proposal. The City may make such investigation, as it deems necessary to determine the ability of the Vendor to furnish the services and the Vendor shall furnish to the City all such information and data for this purpose as the City may request. The City reserves the right to reject any proposal if the evidence submitted by or investigation of such Firm fails to satisfy the City that such Vendor is properly qualified to carry out the obligations of the contract and deliver the services herein

Ratings and Rankings

Ratings on the recent Library Technology Guide Perception Surveys for small public libraries (collection size 30-100,000)

Please indicate number of respondents:

Overall Satisfaction rating and ranking:

Customer Service rating and ranking:

Features rating and ranking:

Comments:

References

Library: _____,

Business Address: _____,

Contact Name / Title: _____,

Telephone Number: _____,

URL of public catalog: _____,

Library: _____,

Business Address: _____,

Contact Name / Title: _____,

Telephone Number: _____,

URL of public catalog: _____,

Library: _____

Business Address: _____

Contact Name / Title: _____

Telephone Number: _____

URL of public catalog: _____

City of Takoma Park

Integrated Library System

F. QUALIFICATION AND CERTIFICATION STATEMENT

NAME OF ENTITY _____

Business Address: _____

_____

Telephone Number: _____

Fax: _____

Web Site: _____

AUTHORIZED REPRESENTATIVE

Name: _____

Title: _____

_____

Telephone Number (office and cell): _____

E-Mail: _____

ORGANIZATIONAL STRUCTURE

Identify the legal structure of the entity responding to the Request for Proposals and include requested information with this submission.

_____ A.   A corporation incorporated under the laws of the State of Maryland, and in good standing to do business in the State of Maryland. A listing of the names and titles of the corporation's directors and officers is attached.

_____ B.   A corporation incorporated under the laws (insert jurisdiction) _____, and registered or qualified and in good standing to do business in the State of Maryland. A listing of the names and titles of the corporation's directors and officers is attached.

_____ C.   A sole proprietor doing business under his/her individual name.

Individual name:_____

_____ D.   A sole proprietor doing business under a trade or business name (for example, John Doe t/a Doe Masonry). List individual name and trade or business name:

_____

_____E.   A partnership. List the type of partnership and the names of all general partners:

_____

_____

_____ F.   A limited liability company organized under the laws of the State of _____, and authorized to do business in the State of Maryland

List the limited liability company name and the names of all members:

_____

_____

_____ G.   Other (explain):

_____

F. CERTIFICATION

       The undersigned proposes to furnish and deliver all labor, supplies, material, equipment, or services in accordance with specifications and stipulations contained in the Invitation for Bids or the Request for Proposals for the prices listed on the enclosed Price Proposal Sheet, if any, and/or upon the terms and conditions set forth in the proposal.

       The undersigned certifies that this bid/proposal is made without any previous understanding, agreement or connection with any person, firm, or corporation submitting a bid or proposal for the same labor, supplies, material, equipment, or services and is, in all respects fair and without collusion or fraud. The undersigned further certifies that he/she is authorized to sign for the Vendor submitting the proposal.

Respondent Name (print): _____

By: _____

       (Signature)

                      (Date)

       Print Name: _____

       Title: _____

G.   CITY OF TAKOMA PARK, MARYLAND

CERTIFICATION OF NON-INVOLVEMENT IN THE

NUCLEAR WEAPONS INDUSTRY

KNOW ALL PERSONS BY THESE PRESENTS:

Pursuant to the requirements of Chapter 14.04 of the Takoma Park Code, the Takoma Park Nuclear Free Zone Act, the undersigned person, firm, corporation or entity hereby certifies that he/she/it is not knowingly or intentionally a nuclear weapons producer.

Note: The following definitions apply to this certification per section 14.04.090:

A "nuclear weapons producer" is any person, firm, corporation, facility, parent or subsidiary thereof or agency of the federal government engaged in the production of nuclear weapons or its components.

"Production of nuclear weapons" includes the knowing or intentional research, design, development, testing, manufacture, evaluation, maintenance, storage, transportation or disposal of nuclear weapons or their components.

"Nuclear weapon" is any device the sole purpose of which is the destruction of human life and property by an explosion resulting from the energy released by a fission or fusion reaction involving atomic nuclei.

"Component of a nuclear weapon" is any device, radioactive substance or nonradioactive substance designed knowingly and intentionally to contribute to the operation, launch, guidance, delivery or detonation of a nuclear weapon.

IN WITNESS WHEREOF, the undersigned has signed this Certification this

____ day of _____, 20____.

Name of
Firm:_____

By:_____(SEAL)

Signature

_____

Print Name & Title

State of _____, County of _____.

Subscribed and sworn to before me this _____ day of _____, 20____.

_____

Notary Public

My commission expires:_____

H. LIVING WAGE REQUIREMENTS CERTIFICATION

(*Takoma Park Code*, section 7.08.200.B)

Business Name: _____

Address: _____

City, State, Zip Code: _____

Phone Number: _____   Fax Number: _____

E-Mail: _____

Please specify the contact name and information of the individual designated by your business to monitor your compliance with the City's living wage requirements, unless exempt under Section 7.08.190 (*see* item B below):

Contact Name: _____

Title: _____

Phone Number: _____   Fax Number: _____

E-Mail: _____

CHECK ALL APPROPRIATE LINES BELOW THAT APPLY IN THE EVENT THAT YOU ARE AWARDED THE CONTRACT AND BECOME A CONTRACTOR.

A.   Living Wage Requirements Compliance

_____ This Contractor as a "covered employer" will comply with the requirements of the City of Takoma Park Living Wage Law (*Takoma Park Code*, Section 7.08.180 *et. seq.*, amended by Ordinance No. 2013-26). Contractor and its subcontractors will pay all employees who are not exempt from the wage requirements and who

perform measurable work for the City related to any contract for services with the City, the living wage requirements in effect at the time of the City contract. The bid price submitted under this procurement solicitation includes sufficient funds to meet the living wage requirements.

B.   Exemption Status (if applicable)

This Contractor is exempt from the living wage requirements because it is:

_____ The total value of the contract for services (based on the bid or proposal being submitted under this procurement solicitation) is less than $20,000.00.

_____ A public entity.

_____ A nonprofit organization that has qualified for an exemption from federal income taxes under Section 501c(3) of the Internal Revenue Code.

_____ A contract procured through an emergency procurement, sole source procurement, or cooperative procurement.

_____ A contract for electricity, telephone, cable television, water, sewer or similar service delivered by a regulated public utility.

_____ A contract for the purchase or lease of goods, equipment or vehicles.

_____ A contractor who is prohibited from complying with the City's living wage requirements by the terms of an applicable federal or state program, contract, or

grant requirement. **(Must specify the law and/or furnish a copy of the contract or grant.)**

C.   <u>Living Wage Requirements Reduction</u>.

_____ This Contractor provides health insurance to the employees who will provide services to the City under the City contract and it desires to reduce its hourly rate paid under the living wage requirements by an amount equal to, or less than, the per employee hourly cost of the employer's share of the health insurance premium. This Contractor certifies that the per employee hourly cost of the employer's share of the premium for that health insurance is $_____.

(Must submit supporting documentation showing the employee labor category of all employee(s) who will perform measurable work under the City contract, the hourly wage the Contractor pays for that employee labor category, the name of the health insurance provider and plan name, and the employer's share of the monthly health insurance premium.)

Contractor Certification and Signature

Contractor submits this certification in accordance with *Takoma Park Code* section 7.08.200.B. Contractor certifies, under penalties of perjury, that all of the statements and representations made in this Living Wage Requirements Certification are true and correct. Contractor and any of its subcontractors that perform services under the resultant contract with the City of Takoma Park, will comply with all applicable requirements of the City's living wage law.

Authorized corporate, partner,

member or proprietor signature: _____

Print name:_____

Title of authorized person:_____

Date: _____

City of Takoma Park

Integrated Library System

I. Metropolitan Washington Council of Governments Rider Clause

USE OF CONTRACT(S) BY MEMBERS COMPRISING THE METROPOLITAN WASHINGTON COUNCIL OF GOVERNMENTS PURCHASING OFFICERS COMMITTEE.

A.   If authorized by the Bidder(s), resultant contract(s) will be extended to any or all of the listed members as designated by the Bidder to purchase at contract prices in accordance with contract terms.

B.   Any member utilizing such contracts) will place its own order(s) directly with the successful Contractor. There shall be no obligation on the part of any participating member to utilize the contract(s).

C.   A negative reply will not adversely affect consideration of our bid/proposal.

D.   It is the awarded vendor's responsibility to notify the members shown below of the availability of the Contract(s).

E.   Each participating jurisdiction has the option of executing a separate contract with-the awardee. Contracts entered into with a participating jurisdiction may contain general terms and conditions unique to that jurisdiction including, by way of illustration and not limitation, clauses covering minority participation, non-discrimination, indemnification, naming the jurisdiction as an additional insured under any required Comprehensive General Liability policies, and venue. If, when preparing such a contract, the general terms and conditions of a- jurisdiction are unacceptable to the awardee, the awardee may withdraw its extension of the award to that jurisdiction

F.   The issuing jurisdiction shall not be held liable for any costs or damages, incurred by another jurisdiction as a result of any award extended to that jurisdiction by the awardee.

In pricing section of contract:

BIDDER'S AUTHORIZATION TO EXTEND CONTRACT:

YES   NO   JURISDICTION

____   ____   Alexandria, Virginia

____   ____   Alexandria Public Schools

____ ____   Arlington County, Virginia

____ ____   Arlington County Public Schools

____ ____   Bowie, Maryland

____ ____   College Park, Maryland

____ ____   Culpepper County, Virginia

____ ____   District of Columbia

____ ____   District of Columbia Public Schools

____ ____   District of Columbia Water & Sewer Authority

____ ____   Fairfax, Virginia

____ ____   Fairfax County, Virginia

____ ____   Fairfax County Water Authority

____ ____   Falls Church, Virginia

____ ____   Fauquier County Schools & Government, Virginia

____ ____   Frederick County, Maryland

____ ____   Frederick County Public Schools

____ ____   Gaithersburg, Maryland

____ ____   Greenbelt, Maryland

____ ____   Herndon, Virginia

____ ____   Loudoun County, Virginia

____ ____   Manassas, Virginia

____ ____   Maryland-National Capital Park & Planning Commission

____ ____   Metropolitan Washington Airports Authority

____ ____   Metropolitan Washington Council of Governments

____ ____   Montgomery College

____	____	Montgomery County, Maryland
____	____	Montgomery County Public Schools
____	____	Prince George's County, Maryland
____	____	Prince George's County Public Schools
____	____	Prince William County, Virginia
____	____	Prince William County Public Schools
____	____	Prince William County Service Authority
____	____	Rockville, Maryland
____	____	Stafford County, Virginia
____	____	Takoma Park, Maryland
____	____	Vienna, Virginia
____	____	Washington Metropolitan Area Transit Authority
____	____	Washington Suburban Sanitary Commission

City of Takoma Park

Integrated Library System