

LIVINGSTON PARISH LIBRARY



RFP Number: RFP-2019-LPL-ILS
is accepting sealed proposals on an

INTEGRATED LIBRARY SYSTEM

This proposal will be received by:

Giovanni Tairov, Library Director
Livingston Parish Library
13986 Florida Blvd
P.O. Box 397
Livingston, LA 70754

until **3:00 P.M. Central Standard Time** on **FRIDAY, SEPTEMBER 30, 2019**

Advertisement in the Official Journal: [The Livingston Parish News](#)
RFP Documents also listed at www.mylpl.info/rfp

Please CAREFULLY read this Request for Proposal on the following pages.

Vendor Name:	
Address:	
Phone Number:	
Date:	

1. General Information

1.1. Overview & Purpose

This request for Proposal (RFP) is issued by the Livingston Parish Library (herein referred to as "LPL") for the purpose of obtaining proposals from Proposers for a hosted Integrated Library System (ILS). LPL seeks a new ILS for the following intended outcomes.

- **Adaptability**- Any selected ILS should have the adaptability to be scalable and flexible for expanding collections and customer base. LPL database must allow for increases with patron records, collections codes, location identifiers, and bibliographic/title records.
- **Curated Collections**- Any selected ILS must include strong analytic tools. LPL will use these tools to create a strong, independent, curated collection for the community—focusing on genres, formats, and other key informational points that the community desires.
- **Discoverability**- Ability to enhance the Online Public Access Catalog (OPAC) for LPL's Community to facilitate a better Discovery experience of library materials, both physical and online.
- **User-Friendly Design**- Provide one place to look for our users, both staff and public interface. Must be Americans with Disabilities Act (ADA) compliant. Support ease of use, intuitive design, and efficient workflow.
- **Responsiveness**- Any selected ILS should have the ability to adapt to LPL needs and to further allow LPL to make changes to adapt to patrons' needs. Strong analytic tools are necessary; statistical information will help focus our decisions regarding purchasing, policy and future directions.
- **Standards**- Adhere to library industry and technology standards and best practices.
- **Web-Based**- Any selected ILS must include a web-based staff client to allow for access beyond LPL walls. This will be necessary for growing the LPL's Outreach department and meeting patrons where they are in the community. Staff must be able to perform circulation duties, such as library card registration and materials checkout, outside of the LPL network

1.2. Background

Livingston Parish Library has capital funding to replace its current Library Management System in 2019. Livingston Parish Library is located in Livingston Parish, Louisiana. The Parish serves approximately 140,000 residents. LPL's system comprises 5 public library branches, an administrative office building, and an outreach services department delivering library service throughout the parish.

LPL's current system is The Library Corporation's Library.Solution LS2 version. LPL installed TLC's Library.Solution system in the early 2000's.

Livingston Parish Library works cooperatively with Livingston Parish Public Schools to issue an eCard to all public school students and staff members. This requires a formal contract between LPL's ILS vendor and the public school system. The winning Proposer must agree to enter into a similar contract agreement; an example of the current contract is provided in this RFP.

1.3. Statistics and Record Counts – Unless otherwise stated below, all statistical and record counts provided were calculated on July 18, 2019.

System and Community Information	
Library locations	5 public buildings; 1 administrative building; 1 bookmobile
Population Served	128,026 (2010 census) / 139,567 (2018 estimate)
Patron Records/Registered Borrowers	128,385
2018 Physical Item Circulation	384,842 (2018 annual report)
2018 Digital Item Circulation (eBook, eAudio, eMagazine, etc.)	47,551
2018 Holds on Items	49,051
ILS Holdings, Items, and Staff Accounts	
Library Physical Title Records	188,377
Library Physical Item Records	373,275
Title/Item Records Added (2018)	12,636 / 24,140
Title/Item Records Deleted (2018)	7,462 / 21,897
Collection Codes	457
Authority Records	275,590
Number of Borrower Types	16: adult, senior citizen, teen, juvenile, educator, facility use, non-resident, outreach adult, outreach student, eCard patron, eCard student, interlibrary loan, online borrower registrant, out of state, staff, technical service patron
Staff User Accounts	90
Email/text Notices (2018)	192,975
User Fines	\$546,831

1.4. Core Applications/Services

At a minimum, the proposed ILS solution should contain the following core applications, or their equivalent as determined by LPL’s sole discretion.

Acquisitions with Fund Accounting and User Roles
Online Public Access Catalog
Cataloging
Circulation, including Offline Mode and Mobile Circulation
Digital Asset Management
Interlibrary Loan Management
Inventory Control and Management
Reports – Management Information System
Serials Control with Fund Accounting
Migration & Support
System Functionality

1.5. Compatibility

The proposed solution should interface with or work in conjunction with LPL’s existing equipment, software, and third-party solutions listed in the table below. Alternatively, the proposed ILS solution could provide equivalent functionality of the third-party solution, either as part of the ILS without the need for interfaces or integration with third-party solutions, or through a different third-party solution. Any costs for integrations or ILS components that replace a listed item below should be clearly indicated in the proposal.

Equipment, Software, & Standards	Description
Epson thermal receipt printers	Charge receipt printing
Okidata dot matrix printer	Used by Cataloging Department as label printers for library collection
Touch screen catalogs for public use	Touch screen catalogs
Ability to read 14-digit codabar patron library cards	Ability to read 14-digit codabar library cards
Ability to read 14-digit codabar item barcode labels	Ability to read 14-digit codabar item barcode labels
Ability to integrate with RFID software	Industry standard
Ability to integrate with RFID charge pads	Industry standard
Ability to integrate with RFID inventory wand	Industry standard
Microsoft Windows	Production and offline software must be compliant with Windows 10.
Anti-virus/malware software	Production and offline software must be able to work on a computer with standard/common anti-virus and anti-malware installation
Centurion Shield software for public and PAC PCs	Restores clean image of PCs on reboot
Z39.50 Client and server	Ability to search catalogs
WorldCat	Ability to integrate with WorldCat to download MARC records
Standard Interchange Protocol (SIP)2	Used to interface with other products
Niso Circulation Interchange Protocol (NCIP)	Used to interface with Auto-graphics state wide Inter Library Loan (ILL) service
Application Programming Interface (API)s	Used to interface with other products
Transport Layer Security (TLS) or Secure Sockets Layer (SSL) Security	Secure access for patron’s accessing accounts via online ILS gateways
Active Directory integration and Single Sign-On	Staff users can use Active Directory accounts to log into ILS and access all permitted functions
Payment Card Industry (PCI) compliance for all financial transactions	Fines and fees payments mechanism must be PCI compliant

Machine Readable Cataloging (MARC)21	Cataloging standard
Dublin-Core	Cataloging standard
Resource Description and Access (RDA)	Cataloging standard
Third-Party/ILS Interfaces/Integrations	Description
Accelerated Reader (AR)/Lexile Measure	Records are updated at least quarterly and new AR/Lexile information is added
Edelweiss	Collection performance management and improvement tool – data about collection and transactions sent from ILS
Square	Credit card transaction service
Demco Software: Signup & Spaces	Program/event calendar with event registration; Meeting room reservations
EBSCO Library Aware Newsletters	Newsletters use patron email list from ILS
EBSCO Novelist	Reader's advisory service that provides information about on-the-shelf availability and linked to catalog
EBSCO Stacks	Content management system that can link/integrate with catalog
CloudLibrary by Bibliotheca	Circulating online collection
hoopla by Midwest Tape	Circulating online collection
Recorded Books Digital	Circulating online collection
Google analytics	Code for Google Analytics
Ingram iPage	Selection & Ordering via EDI
Baker & Taylor Titlesource 360	Selection & Ordering via EDI
Midwest Tape	Selection & Ordering via EDI
Playaway/Findaway	Selection & Ordering via EDI
Thorndike (Cengage Publishing)	Selection & Ordering via EDI
Syndetics Unbound	Catalog content enrichment
Short Message Service (SMS) text service	ILS SMS text patron notices
Rivistas	Serials subscription management

1.6. Existing Hardware/Software

All of our workstations (staff and public) have:

- Windows 10 Pro Operating system
- Access to local and Networked printers (Including thermal receipt printers where applicable)
- USB Barcode scanners
- At Least 8 GB Ram
- Gigabit ethernet connections

Servers: Livingston Parish Library is running virtual machines using Microsoft Hyper-V. Your system must also be compatible with VMware ESXi 6.5 also.

LPL Physical server specifications:

- Dell poweredge R730
- 2 Intel Xeon E5-2630 8 core @ 2.40 GHz 16 threads for a total of 32 Logical processors
- 192 GB ram
- Hard drives: 1 Raid 558GB Raid one drive for OS, 1 3.5TB Raid 10 disc for VM storage
- 8 nic ports (1 management port, 1 Iscsi port, 6 LACP bonded ports for six gigabit production bandwidth)
- Redundant power supplies

Backup: The Library uses Quest Rapid Recovery for backups every 3 hours on our ILS systems to minimize the amount of work that must be redone if a recovery needs to happen.

ISP: The Library uses Cox Business for internet and WAN. We have a 1 GB connection to the internet and a 1 GB Metro Ethernet to all sites.

Router/Firewall: The Library is all connected to the outside by use of a Meraki MX device. We have an extra layer of content and security by also utilizing Cisco Umbrella services.

2. Proposal

2.1. Submission Requirements

The Proposal shall include all requested information and documents as outlined in this Request for Proposal (RFP). Proposals received should be completed in a format and order that is described in this RFP or the Proposal may not be accepted.

Submission of Proposals: One (1) signed original response, marked "Original" and four (4) copies, marked "Copy", of the proposal to be submitted to Livingston Parish Library. In addition to the hard copies, one (1) digital copy should be submitted in PDF format. Costs incurred in the preparation and submittal of proposals are the responsibility of the Proposer and will not be reimbursed.

Additional information may be attached to clarify narrative, functionality, and/or compatibility. Please clearly identify Section and Item Number which the accompanying materials address. Please do not include marketing materials.

Submissions should be mailed to the following address, based on carrier service used by the proposer.

Post Office box for USPS	Physical Address for Other Carriers
ATTN: Giovanni Tairov, Director Livingston Parish Library P.O. Box 397 Livingston, LA 70754	ATTN: Giovanni Tairov, Director Livingston Parish Library 13986 Florida Blvd Livingston, LA 70754

2.2. Proposer Inquiries

All questions regarding this RFP should be submitted in writing no less than seven (7) days prior to the opening of proposals. Questions regarding the proposal may be addressed to both:

Giovanni Tairov, Director
Livingston Parish Library
13986 Florida Blvd
Livingston, LA 70754
Email: director@mylpl.info

and Jennifer Seneca, Assistant Director
Livingston Parish Library
13986 Florida Blvd
Livingston, LA 70754
Email: jseneca@mylpl.info

All questions submitted to Livingston Parish Library will be reviewed. Responses will be issued as an additional document and released on the library's website at www.mylpl.info/rfp. This document will be uploaded by close of business on September 23, 2019.

2.3. Estimated Schedule of Events

RFP Advertisement Period Begins	August 12, 2019
Deadline for Questions	September 16, 2019
Library Response to Proposer Questions	September 23, 2019
Deadline for Receipt of Proposal	September 30, 2019 at 3:00 p.m.
Proposer Demonstration	October 2019
Library Board of Control Review	November 2019
Bid Award Announced	November 2019
System Fully Operational	August 31, 2020

2.4. Contract Term and Insurance Requirements

The successful Proposer will be required to execute a contract with Livingston Parish Library. If an agreement is offered to a Proposer, the term will be for a twelve (12) month period. The Proposer will begin performance within thirty (30) days after receiving the work order or "Notice to Proceed" and have the system fully operational by August 31, 2020. The agreement may be renewed automatically for ten (10) successive one year periods unless either party gives written notice of its intent to not renew this agreement at the same prices, terms, and conditions except that a price adjustment based on the Consumer Price Index (CPI), not to exceed five (5) percent, may be considered, at the sole discretion of LPL, in the fifth (5th) year of the agreement and each fifth year thereafter.

2.5. Response Documents and Order

Proposer's response should include answers to questions, completed forms, and requests for information in separate documents numbered to correspond with the document listing below. Please try to avoid any elaborate promotional materials and provide only information that is required. All supporting materials should clearly reference the RFP section to which they pertain.

- Company Narrative and Response to Questions
- Completed Functionalities Checklist Form (Attachment A)
- Completed Compatibility Checklist Form (Attachment B)
- References (Attachment C)
- Completed Cost Proposal (Attachment D)
- Signed Proposal Form (Attachment E)

2.6. Evaluation Criteria

Written proposals will be evaluated by the library staff ILS RFP committee. The committee will review the RFP responses utilizing the criteria and corresponding point system below. After review, the committee will contact one (1) or more of the Proposers, based on the criteria stated below, for an in-depth onsite or web demonstration of the proposed hosted ILS solution. The final award recommendation is at the sole discretion of Livingston Parish Library.

Company Capacity, Experience, & Vision	25 Possible Points
Conformity to Functionality	25 Possible Points
Conformity to Compatibility	10 Possible Points
References	10 Possible Points
Cost/Price (one time and Recurring)	20 Possible Points
On-site Demonstration	10 Possible Points
Total Possible Points:	100 Possible Points

Company Capacity, Experience & Vision25 Possible Points

The Proposer should submit satisfactory evidence that they possess an adequate inventory of resources; have adequate staff to perform the type, magnitude, and quality of work as specified in the RFP. Please address all questions listed below. If needed, please also provide additional supporting documents.

In addition, a successful proposal will also include a narrative about the Proposer's organization, its product deployment and data migration methodologies, as well as its customer service and support practices. If needed, additional supporting materials can be included in separate documents that clearly indicates which Section and item to which the supporting material refers.

1. Provide a summary of the organization's experience and qualifications, including: a brief history of the organization, ownership information, number of employees, percentage of employees assigned to product development and/or support, headquarters address, and names of key executives. Discuss the organization's corporate outlook over the next three (3) years including market share, stability, goals, and major initiatives.
2. Have there been any changes in ownership, other than shares on a public stock exchange, in the organization in the last seven (7) years?
3. Have there been any environmental, financial, and/or social sustainability steps taken by the organization?
4. Please state the number of employees of the organization that hold a Master of Library Science (MLS) or Master of Library and Information Science (MLIS) degree.
5. Please identify staff who would be involved in implementation and migration, including a hierarchy of staff, listing supervisor(s) and technician(s). Please indicate who the library contacts should an issue arise.
6. Please provide a chart showing how many production versions of the proposed software the organization currently supports. What percentage of customers are currently running each version?

7. What other ILS products does the organization offer and/or support outside the scope of the one offered in this proposal? What percentage of customers are running that product?
8. Please provide an estimated timeline for the installation, migration, training, and go-live process. Include in your estimation what LPL staff time and resources will be needed to support the installation, migration, training, and go-live process including required roles and degree of involvement.
9. Based on previous experience, are there any potential issues that would prevent data to be migrated to your proposed solution from LPL's current ILS: The Library Corporation Library.Solution LS2. Please address each of the following using record numbers found in the above Section 1.3 Statistics and Record Counts table, plus growth:
 - a. Merging and duplication of bibliographic records
 - b. Processing and loading of Item Records: Are there any records that will not be loaded? Does this include all item records marked as discard, missing, in processing, on order, cataloging, repair, lost, staff action (lost, missing, damaged), damaged, in storage, withdrawn. If so, which ones and why?
 - c. Processing and Loading of Bibliographic and Authority Records: Are there any bibliographic records that will not be loaded? If so, which ones and why?
 - d. Processing and Loading of Serial Records: Currently, Livingston Parish Library does not use a serials module with the current vendor. LPL wishes to use a serials module with the new vendor. What steps are required to identify serials records, prepare them for migration, and ensure they load into the Proposer's serials module/utility correctly?
 - e. Processing and Loading of Patron Records: Are there any records, either expired or not expired, that will not be loaded? What information contained within patron records will or will not be loaded, for example patron charge history, loan history, notes added by staff, additional address and/or phone numbers, notification types, uploaded photos, authorized patrons, or other custom fields? If so, which ones and why?
 - f. Processing and Loading of Acquisitions Order Records: Are there any records, including past fiscal years, which will not be loaded? If so, which ones and why?
 - g. Processing and Loading of Circulation Loans Records: Are there any records that will not be loaded? If so, which ones and why?
 - h. Processing and Loading of Circulation Requests/Holds Records: Are there any records that will not be loaded? If so, which ones and why?
 - i. Processing and Loading of Circulation Fines Records: Are there any records, including past years, which will not be loaded? If so, which ones and why?
10. What does the ongoing support process following go-live include as part of the annual maintenance? Please include detailed descriptions of reporting and resolution processes as well as support staff availability, access to that staff by Library System staff, resolution timelines and guarantees, and upgrade support.
11. What does the Proposer require of the library's IT staff for migration, other than access to the library's current data? For example, firewall rules, VPN access to network, Static Public IP addresses, Public IP address range, etc. Please provide a list.
12. Describe the data centers(s) where the hosting is performed, their location, who provides their Internet connection, and any certifications or standards followed by the facility.
13. Is the data center N+1 or N+2 redundant?

14. How often does the data center load test its generators?
15. During a disaster, how will the data center or the Proposer keep the library informed?
16. If the hosting service performed is on a shared server, provide server details such as CPU, available RAM, HDD space?
17. If shared server hosting is provided to LPL, how does the Proposer and/or data center monitor network load to ensure fast response rates for data retrieval during day-to-day transactions at LPL's branches.
18. If shared server hosting is provided to LPL, how does the Proposer and/or data center monitor CPU load to ensure fast response rates for data retrieval during day-to-day transactions at LPL's branches.
19. If the hosting service performed is on a dedicated server, provide details such as CPU, disk space, RAM.
20. Describe the physical security of your data center. Does your company have an information security officer?
21. What is your uptime percentage?
22. Describe your backup, retention, disaster recovery process, and average recovery time.
23. Describe how personally identifiable patron data is secured at the data center and in transmission.
24. Have you established and implemented a clear data breach response outlining organizational policies and procedures for addressing a breach?
25. Describe ownership of data stored at the data center. Will our data be stored in a proprietary format? Are we able to, at any time, acquire a snapshot of our full data?
26. Describe database structures, including any database utilized for discovery layer, if separate from the main ILS.
27. Describe the entire process for creating and processing offline transactions both at the staff client end and the remote server end.
28. Describe any proactive monitoring and maintenance of the proposed solution.
29. Describe the training that can be provided as part of this solution. Does the Proposer's organization offer on-site training both before "go-live" and ongoing during the length of use? Is there off-site training available? Is there web-based training available? Describe the options or tiers of options available and associated costs for each option.
30. Describe how the ILS is accessed for staff and patron functions. Does the solution require Virtual Private Network (VPN) or Static Internet Protocol (IP)?
31. What data speed is needed for library branches to properly perform staff and patron functions?
32. Discuss the organization's development methodology. Include the process for customer enhancement requests. What percentage of annual development is driven by customer enhancement requests?
33. Discuss any innovations that you have developed or are developing of which LPL may not be aware. For any items in development, please provide timelines for general release and estimated costs to LPL should they not be available for purchase at the time of proposal.
34. Discuss any unique aspects of the Proposer's organization or products.

35. List any criminal, civil, and disciplinary proceedings or hearings concerning business related offenses, within the past three (3) years, in which the Proposer, its principles, officers, or predecessor organization(s) were defendants' parties related to this type of work.
36. Please describe any and all pre-migration data refining or "scrubbing" services that the Proposer's organization offers including pricing and degrees or depth of service. One example: Address verification and field normalization.
37. Describe your Help Desk capacity. Discuss hours of operation, locations of call centers, and who from the customer site can be authorized to call for support.
38. Describe support services offered. This must include post installation response and resolution times, along with support hours.
39. Discuss the change control process as it relates to support, and on average how often new updates are released.
40. Describe how you anticipate responding to new technologies and future direction over the next five years.

Conformity to Functionality..... 25 Possible Points

The Proposer should submit satisfactory evidence that they can provide functionality and information about availability for both the core applications/services and other applications. Please complete the attached Functionality Checklist (Attachment A) provided, and, if needed, provide additional supporting documents. Any additional supporting materials submitted must be included in a separate document(s) that clearly indicates which section and item to which the supporting material refers.

The Functionality Checklist form (within each function) includes separate Columns (defined below). **Proposer's response should include "X" in most appropriate of these four (4) columns:**

- Yes: As stated this function is met in the proposed system.
- No: As stated this function will not be provided.
- Future: As stated this function will be met in a future release dated mm/dd/yy (date must be included, or response will be considered as No "will not provide").
- Custom: As stated this function will be met by a customization (denote if customization will be at an additional cost, and what that cost would be, beyond the standard pricing information). Additional costs for customizations should also be included on the cost proposal form.
- Additional Information: If Proposer wishes to submit additional information on any listed functionality, this information must be submitted in a separate document title "Functionality Checklist: Additional Information". Please list additional information in chronological order, referencing the section and functionality list number. Do not submit marketing materials as additional information explanations in this section.

Please note: If selected answer is Future or Custom, additional information must be provided in a separate supporting document. Please list additional information in consecutive order and clearly identify section, function, and number to which information applies.

Example: If in the acquisitions function document, you need to respond to #9 and #18 you would put in your document ---

acquisition #9 yes this would be custom work but is included in maintenance cost

acquisition #18 that is coming in future release 11-1-19

Note: LPL is interested in learning about other applications and/or services your company may provide either as part of the ILS, or as third-party interfaces or services. Please provide additional information about other applications and services in your company's narrative.

Conformity to Compatibility 10 Possible Points

The Proposer should provide information on compatibility of proposed ILS with LPL's current library software, equipment, and third-party solutions. Please complete the Compatibility Checklist (Attachment B), and, if needed, provide additional supporting documents.

The Compatibility Checklist is divided into two (2) sections:

1. Compatibility Checklist – Equipment, Software, and Standards
2. Compatibility Checklist – Third-Party/ILS Interfaces and Integrations

References 10 Possible Points

The Proposer should submit satisfactory evidence that they possess past experience working on similar projects for other libraries by providing references who have received services from your company. Please include libraries of similar size to LPL and closest geographical location. Please use Attachment C. References should include:

- At least three (3) current client references of public libraries which are similar in size and transaction volume as LPL. Please also include additional clients that have been deployed in the last thirty-six (36) months. Include customer name, contact name, phone number, and email address for each reference.
- At least three (3) client references who have received services from your company and whom you no longer provide service. Please include customer name, contact name, phone number, and email address for each reference.

Cost Proposal..... 20 Possible Points

The Proposer should complete and submit the attached Cost Proposal. Table should include at minimum, implementation fee, hosted ILS subscription fee and other fees. Please use the additional rows, if needed, for other pricing details. The Total should be the Total cost of project and ongoing

annual costs. Provide supporting information if appropriate. Be succinct. If there are other possible known fees please provide pricing details, for example pricing for post-project design changes, integration with other products, or other needs described within this RFP. Livingston Parish Library reserves the right to select the features/options that best fits the library's needs at implementation and to add other options later based on the prices submitted in the RFP.

- Pricing should reflect a Proposer-hosted solution for the system.
- If your system does not have a specific line item, indicate that with an N/A in the appropriate column.
- Please feel free to add items to the cost table (in the space provided) if you have items which do not fit into the specific categories.
- Costs for all modules and add-on functionality must be included in the cost table.
- Prices for the initial purchase, implementation and five (5) years of maintenance should be included for each applicable item.
- The prices submitted shall remain the same except that a price adjustment based on the Consumer Price Index (CPI), not to exceed five (5) percent, may be considered, at the sole discretion of LPL, in the fifth (5th) year and each fifth year thereafter.

Demonstration 10 Possible Points

The proposer should provide onsite or web demonstration of the proposed hosted ILS solution. The library requests short demonstrations targeting specific, high-priority functionality.

Proposers who score less than combined total of seventy (70) points for the first five (5) evaluation criteria above, will not be considered as a potential candidate for the on-site or web demonstration. Of those Proposers who score seventy (70) points or more for the first five (5) evaluation criteria, the three (3) highest scoring proposals will be invited to participate in the on-site or web demonstration process which will be scheduled during the month of **October 2019**. Proposer may receive as much as ten (10) points during the on-site or web demonstration which will be added to the combined score for the first five (5) evaluation criteria above, and the sum of all six (6) sections will determine a Proposer's total score.

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Attachment A - Functionality Checklist

1. Functionality Checklist – Core Applications and Services

Proposer's response should include "X" in most appropriate of these four (4) columns.

- Yes: As stated this function is met in the proposed system.
- No: As stated this function will not be provided.
- Future: As stated this function will be met in a future release dated mm/dd/yy (date must be included, or response will be considered as No "will not provide").
- Custom: As stated this function will be met by a customization (denote if customization will be at an additional cost, and what that cost would be, beyond the standard pricing information).
- Additional Information (Addt'l Info): Additional Information has been included in a separate document, clearly indicating functionality section and item number.

Acquisitions Functions

The Library expects a seamless flow of orders through the Acquisitions module, with limited staff interaction once the parameters are established.

	Acquisitions Functionality	Yes	No	Future	Custom	Addt'l Info
1.	Acquisitions is fully functional, integrated subsystem or module that can manage a complex system of orders, encumbrances, funds, and expenditures in multiple library-defined accounts based on common acquisition activities including, but not limited to, selecting, ordering, receiving, claiming, invoicing, and reporting.					
2.	Ability to move between acquisitions and other ILS functions without logging in to different modules or subsystems.					
3.	Ability to sync all collections against the ILS database, even those hidden from OPAC display. Sync is seamless with no need for staff to show hidden collections in OPAC for sync process.					
4.	Ability to choose which collections users can order from within Acquisitions module, without intervention from Proposer					
5.	Unlimited number of users					

	Acquisitions Functionality	Yes	No	Future	Custom	Add'l Info
6.	<p>Ability to set customized, granular permissions for individual users for a variety of functions:</p> <ul style="list-style-type: none"> • Create, view, edit, release orders/selection lists • Create, view, edit vendor records • Create, view, edit funds and fund allocations • Create, view, edit, print purchase orders • Create, view, edit, print reports 					
7.	Ability to share order lists with any/all users regardless of permission levels					
8.	<p>Supports different order types, including firm orders, subscriptions, continuations, etc. Includes the following data in the acquisitions subsystem/module:</p> <ul style="list-style-type: none"> • bibliographic information • acquisitions type (firm, gift, blanket) • status information (on order, cancelled, received) • library/branch/copy/fund information • invoice information • vendor information • accounting information • requestor information with ability to place hold on patron's account • instructions to vendor • internal processing instructions and notes 					
9.	Provides at least the following access points for acquisitions records: purchase order number, title, author, Library of Congress card number, ISSN/ISBN, bib number, vendor, UPC code, notes field					
10.	Ability to track library defined fund/budget codes					
11.	Maintains a complete audit trail for fund allocations and adjustments by user accounts					
12.	Supports multiple overlapping fiscal periods in its fund accounting structure					
13.	Supports fund account name changes from year to year					
14.	Supports two overlapping fiscal periods, where staff can order from the new year while continuing to expend out of the old					

	Acquisitions Functionality	Yes	No	Future	Custom	Add'l Info
15.	Ability to separate Acquisitions budgets, Vendors, activity and data for designated groups of libraries.					
16.	Ability to delete a record for any item in a previous fiscal year					
17.	Ability to archive orders, including by fiscal year					
18.	Supports the ability to suppress on-order items and on-order bibliographic records from display in the PAC, on a system, order, or per item basis					
19.	Ability to utilize Electronic Data Interchange ordering, EDI X12 version 4010 or higher					
20.	Orders initiated by staff automatically flow through ordering, receiving and invoicing with no additional staff intervention for EDI vendors					
21.	Orders and invoices are integrated with distributor/vendor system, with no staff intervention					
22.	Generates a unique Purchase Order Number for each order released					
23.	Supports the ability to generate a printable purchase order for submission to independent booksellers and other vendors that are not EDI compliant or do not have an electronic gateway for ordering.					
24.	Generates a unique Item Number for each item ordered					
25.	Ability to create grid templates and/or distribution profiles for multiple branches and/or collections					
26.	Ability to create order records from imported vendor carts, via a MARC file and/or cvs/xls template, with no 9XX data included					
27.	Supports vendor selection lists (either MARC file or cvs/xls file) import with 9XX data included					
28.	Ability to choose distribution information released to vendor					

	Acquisitions Functionality	Yes	No	Future	Custom	Add'l Info
29.	Ability to setup multiple vendor profiles, including EDI, for each vendor, based on account numbers/profile settings provided by vendor					
30.	Ability to make customizable data entry and add free text fields to selection and purchase requests, which can be mapped to note fields in the MARC record at library's discretion					
31.	Ability to easily add additional copy or copies to unfulfilled order records					
32.	Supports full MARC upload even with errors, which doesn't stop the whole upload process for records with no errors.					
33.	Ability to generate error reports for MARC file upload to show which records did not upload due to error.					
34.	Ability to distribute partially approved/received orders					
35.	Ability to change the fund after the order is released but before invoice is received and approved.					
36.	Ability to make changes, or edit, an EDI invoice					
37.	Ability to unapprove an invoice					
38.	Ability to create an invoice for non-EDI orders					
39.	Selections and purchase request functions are part of the Acquisitions software					
40.	Ability to create and maintain selection and ordering lists					
41.	Ability to share lists with other users, either by choosing an individual user or group of users					
42.	Ability to create an approval workflow for selection lists/orders					
43.	Supports approval process that retains all patron requests, notes, vendor information, etc. even when the request is rejected and returned for corrections.					
44.	Customer suggestions automatically flow through system, from customer into ordering process, with only staff intervention being acceptance/modification of order request					
45.	Supports automatic claims and cancelling process – generating an emailed report of items claimed or cancelled					

	Acquisitions Functionality	Yes	No	Future	Custom	Add'l Info
46.	Ability to turn off automatic claims and cancelling process - either for individual vendors or for whole module					
47.	Ability to customize and configure acquisition reports, including but not limited to invoice, fund summary, fund history, order history, distribution report, users, and user distribution profiles.					
48.	Provides a reporting feature listing bibliographic/item order records that did not automatically download to the OPAC, and includes ability to email this information to designated users on a library-determined schedule					
49.	Provides an error reporting feature listing patron holds that were not placed for requested items ordered, and includes ability to email this information to designated users on a library-determined schedule					
50.	Provides a reporting feature to identify orders cancelled by vendor that have patron holds/request attached to the item, and includes ability to email this information to designated users on a library-determined schedule					
51.	Provides an error reporting feature listing MARC records that did not download/integrate with OPAC and offers ability to retry download.					
52.	Library requests a step-by-step guide to placing orders					
53.	Library requests a step-by-step guide to receiving items from orders					
54.	Library requests a step-by-step guide to for processing claiming materials not received					

Catalog/OPAC Functions

The Library expects that a proposed catalog will include all aspects of library holdings, services, and programs, both internal and external to the Library. Searching should be simple, intuitive, accessible, and provide access to library user's account. Searching should also include advanced functionality useful for the trained library professional.

	Catalog/OPAC Functionality	Yes	No	Future	Custom	Add'l Info
55.	Functionality of catalog is intuitive for end users					
56.	Ability to provide outside network access to OPAC for patrons					
57.	Ability to increase the display font and support various resolutions.					
58.	American with Disabilities Act (ADA) Compliant/website accessibility compliant					
59.	Customized work remains active after upgrades					
60.	eCustomer support for library's page-level customization					
61.	Ability to configure the bibliographic data that appears in the search results screen, choosing from all MARC fields and subfields, specifying field labels and determining the order of the display.					
62.	Ability to customize verbiage for item availability, headings, status and other wording throughout the catalog					
63.	Ability for MACHine-Readable Cataloging (MARC) records to be discoverable by Google, linked data standard					
64.	Personalized display as per language selection of user					
65.	Language interfaces in multiple languages, but must include English, Spanish, and French					
66.	Mobile friendly and device responsive on all types of devices.					
67.	Gathers statistics on the type of devices used to access the catalog.					
68.	Catalog provides static URL not sessions for easy linking in library marketing and social media					

	Catalog/OPAC Functionality	Yes	No	Future	Custom	Add'l Info
69.	Cross browser compatible (Internet Explorer (IE), Chrome, Safari, Firefox, Opera, etc.)					
70.	Display and functionality are backward compatible with older devices and older web software					
71.	Secure Socket Layer (SSL) encryption					
72.	A seamless experience for patrons using the PAC, whether using the library's PAC machines on premises or remotely using a PC or mobile device.					
73.	Ability to automatically generate and display customized carousels of new and featured items, per parameters defined by library					
74.	Ability to readily display library defined searches or lists, such as new materials					
75.	Supports enriched data, such as book jacket image, contents, excerpts, etc.					
76.	Enhanced content, such as reviews, graphics, and read-a-likes, integrated with Novelist					
77.	Offers version of catalog designed for children, aged 13 and under					
78.	Ability to integrate Accelerated Reader levels, either native to ILS or integration through API					
79.	Ability to update Accelerated Reader levels in OPAC twice a year					
80.	Ability to search OPAC by Accelerated Reader levels					
81.	Integrates with Google Analytics (GA) with ability to separate internal and external traffic; or built-in usage reporting tool					
82.	Ability to work with mapping vendor to show exact location of items.					
83.	Can text or email items' title and shelf location to designated phone number or email address.					
84.	Patrons can rate and review titles in library catalog					
85.	Provides search result relevancy ranking.					

	Catalog/OPAC Functionality	Yes	No	Future	Custom	Add'l Info
86.	Functional Requirements for Bibliographic Records (FRBR)ized results (groups similar material i.e. same title or author with different formats)					
87.	Collapsible limiters/facets to avoid scrolling					
88.	Ability to specify that resources are featured only at specific libraries or branches.					
89.	Ability to specify (filter) item locations in first results display screen					
90.	Visible location & availability on results screen					
91.	Supports novice and advanced user searching capabilities, such as keyword, proximity, full-text searching, phrase searching, auto-truncation, wildcard, etc.					
92.	Smart searching and results, including (misspellings) "did you mean?", "fuzzy" search.					
93.	Ability to enable (or disable) automatic suggestions as patrons type quick, keyword or phrase searches in the PAC.					
94.	Support for keyword searching across all indexed fields					
95.	System provides methods to search/browse, limit or filter through search results such as (but not limited to): current location, branch location, date/date range, Material format (books, audio, etc.), Language, Call number, Shelving location/holdings, circulation status, genre, reading level, electronic resource, specific collection, recently published materials, on-order materials, series					
96.	Multi-faceted searching (author/title, year/format, title/publisher, author/subject)					
97.	System supports an optional number search which includes: call number, International standard book number (ISBN), International Standard Serial Number (ISSN), Bibliographic record, Universal Product Code (UPC), Publisher number, Library of Congress Control Number (LCCN)					

	Catalog/OPAC Functionality	Yes	No	Future	Custom	Add'l Info
98.	If items not found in searching, offer other suggestions based primarily on search term and show link to purchase request form					
99.	Seamless integration with third party vendor information, for example hoopla, CloudLibrary, World Book, EBSCO, or RBDigital					
100.	Sync digital titles in catalog alongside physical materials so searches can return comprehensive results					
101.	Provide ability to search in multiple databases simultaneously and identify sources of merged results					
102.	Ability to link library provided databases to common search terms and suggest/advertise that database to patrons who search those terms					
103.	Ability to tie into Summer Reading Online Program for summer reading program (via Beanstack)					
104.	Ability for library patrons to access their library card account through the OPAC					
105.	For non-library users, provide online form for potential users to apply for and create a temporary library card account (eCard account). Library has full control over the fields and information gathered, including the ability to suppress certain fields or options.					
106.	All eCard accounts create a staff alert to verify patron information on the first visit to a physical library location.					
107.	Ability for library to limit privileges to eCard accounts per library policy					
108.	Account information is secure and cannot be accessed via back button, caching, or other methods					
109.	Catalog provides personal recommendations based on previous activity					
110.	Upon login, offer access to account summary display that includes items checked out, items requested, and items ready for pickup, outstanding fines, list fines paid, etc.					

	Catalog/OPAC Functionality	Yes	No	Future	Custom	Add'l Info
111.	Library patron can manage own account with no staff interaction, including change password, review/place/cancel/freeze holds, change pickup location, review check-outs, see outstanding charges, view loan history with no staff intervention or additional data entry.					
112.	Display detailed list of items checked out including remaining renewals, due date, barcode, title info linkable into database and call number.					
113.	Ability for patrons to renew selected titles directly from the list.					
114.	Users can request to renew an expired library card through form integrated in the ILS.					
115.	Ability to set up, save and retrieve searches.					
116.	Ability to create and manage book lists, include the ability to place a hold directly within the book list					
117.	Under user account, ability to sort by any column, including holds, items checked out, and history					
118.	Submitted user reviews must be reviewed by authorized library user before public display					
119.	Under user account, ability for users to easily print or export (.cvs or .xls format) saved lists					
120.	Ability for patron to enable or disable loan history					
121.	Notifies patron that loan history cannot be retrieved once disabled.					
122.	Patrons can print out list of items they currently have checked out					
123.	Ability to renew both physical and digital materials					
124.	Includes both digital checkouts and holds within the patron's account.					
125.	Offers the ability for libraries to allow patrons to share bookmarks to titles through social media.					

	Catalog/OPAC Functionality	Yes	No	Future	Custom	Add'l Info
126.	Display holds filtered by whether the requested material is ready for pick-up and include title, author, format, pick-up location, automatic cancellation date, active/suspend status, status of hold, and offer ability to cancel, suspend, and reactivate the hold from the screen					
127.	Ability to suspend/pause or cancel holds in patron account					
128.	Ability to place holds on specific copies					
129.	Ability to place holds on specific volumes					
130.	Ability for patron to place a purchase request if a search result is null. Purchase request form connects back to Acquisitions module.					
131.	Ability for patrons to place InterLibrary (ILL) Loan requests if a search result is null					
132.	Patrons can see how many holds exist on a record when placing a hold including the total number of available copies.					
133.	Ability of users to see all their ILL requests with integration of ILL Service (Loanshark)					
134.	Ability for patron to manage notification options, including how they wish to receive (email, text, phone) and what they wish to receive (marketing, holds, overdue, courtesy, outreach) without staff intervention					
135.	Ability for patron to specify a time of day they prefer or do not prefer to receive notifications					
136.	Ability to email user notifications when newly arrived items are added to collection based on profile preference					
137.	User can choose to have materials auto-renew with notification.					
138.	Allows authenticated patrons to submit changes to their account information, such as change of address, and allows library ability to limit or allow such changes. Patron account is flagged for review at patron's next visit.					
139.	Ability for an authorized user to link family records of existing customers without staff intervention					

	Catalog/OPAC Functionality	Yes	No	Future	Custom	Add'l Info
140.	<p>Ability for linked family members to manage library cards for linked members, including:</p> <ul style="list-style-type: none"> • View items currently checked out • View account status • Renew items • Request renewal of expired card • Update contact information <p>Patron accounts are flagged for review at next visit.</p>					
141.	Ability for linked family members to update/modify notification preferences for linked members.					
142.	<p>Ability for linked family members to manage holds for linked members, including:</p> <ul style="list-style-type: none"> • Placing holds • Suspending holds • Canceling holds • Update pick-up location for holds 					
143.	Ability for linked family members to pay for all or selected fines via bank card through library catalog					
144.	Ability for patrons of majority age, as defined by library, to opt out of family membership with no staff intervention					
145.	Integrated, intuitive online fine payment solution (use of credit/debit card) or ability to integrate with third party vendor that is PCI compliant					
146.	Online fine payment allows patron to pay all or select fines on account.					
147.	Online fine payment allows patrons to pay all or partial amount of any fine on account.					
148.	Ability for library to disallow online fine payments under a defined amount					
149.	Ability for library to charge a convenience fee/charge for online payment and have this charge calculated in sum of total fees to be paid.					

Cataloging Functions

The Library expects that the cataloging module is intuitive to staff, with an emphasis on cataloged items being discoverable to the public.

	Cataloging Functionality	Yes	No	Future	Custom	Add'l Info
150.	24/7 access to cataloging utility if in a cloud environment, including step-by-step instructions on how to access the utility					
151.	Ability to download and use records from OCLC WorldCat or offers a comprehensive database for MARC records, especially AV materials.					
152.	Z39.50 (Smartport) capability, including ability to determine match points					
153.	Includes a Z39.50 version 3 compliant catalog without additional charge					
154.	Supports the ability to search a remote Z39.50 database from the staff client, edit the record as required, and save it to the database without invoking a separate record import function					
155.	Supports the ability for authorized staff to copy existing authority records from selected Z39.50 sites directly into the system					
156.	Clean up duplicate authority records during ILS transition					
157.	Supports an import process that performs authority control on imported bibliographic records and automatically links to a remote subscription authority database if no matching heading is found in the local database					
158.	Items are discoverable on the internet, including but not limited to Bibframe functionality [linked data/semantic web]					
159.	Ability to upgrade records to be discoverable on the internet					
160.	Records can be RDA compliant					
161.	Tools are available to convert/upgrade MARC data to RDA or other future cataloging standards					
162.	Provides the ability to suppress specific bibliographic records from showing in OPAC at the title record level					

	Cataloging Functionality	Yes	No	Future	Custom	Add'l Info
163.	Provides the ability to suppress specific item records from showing in OPAC at the item record level					
164.	Ability to edit actual MARC records in web version of cataloging, if offered					
165.	Access and utilize MARC records from a variety of sources, such as vendors and other libraries					
166.	Ability to index any and all fields in MARC record					
167.	Supports varieties of import template capabilities, including item level information mappings					
168.	Provides cut, copy, and paste commands for MARC record editing					
169.	Ability to integrate digital content from third party vendors, the web, and the local library					
170.	Ability to define multiple loading properties, specify loading parameters for overlay, and specify match point in loading profiles					
171.	Ability to automatically create and populate item information during MARC record loading process					
172.	Batch export MARC records (Marcout) with or without holding information via scheduled task					
173.	Ability to build customized spine labels					
174.	Create customized lists and reports					
175.	Supports the ability for the Library to flag certain bibliographic records to protect them from being overlaid					
176.	Supports the ability to specify certain tags to be removed automatically from bibliographic records during the imports process					
177.	Supports importing of multiple files in one import process					
178.	Supports the ability to bulk change wherever multiple items are selected					
179.	Ability to accept and display diacritics in importing records					
180.	Ability to accept and display diacritics in record creation					

	Cataloging Functionality	Yes	No	Future	Custom	Add'l Info
181.	Provides macros or other workflow for repetitive data entry tasks					
182.	Ability to add (and edit) a link to library hosted images for special library collections that would appear in OPAC.					
183.	Easy access to help tool for copy catalogers					
184.	Spell check capability, including American English					
185.	Shows a preview version of the bibliographic record as it will appear in the PAC, including active URLs. Ability for side-by-side comparison preferred.					
186.	Ability to suppress or allow the following functions at an item record level: <ul style="list-style-type: none"> • Holds • Shows in OPAC • Allows circulation from owning branch only 					
187.	Offers a label manager, compatible with dot matrix printers. For example, OKI MICROLINE printer					
188.	Provides an optional warning if the existing barcode is changed					
189.	Supports ready access to SQL query tools for the cataloger to (optionally) use in searching					
190.	Shows statistical usage details on the bibliographic and item records					
191.	Provides real time update to OPAC of cataloging changes					
192.	Works in offline mode					
193.	Unicode and Hypertext Markup Language (HTML) compatible					
194.	Support Functional Requirements for Bibliographic Records (FRBR)					
195.	Batch, or individual, import/download of MARC records from any source to generate bibliographic and item records in the Integrated Library System (ILS). The records may be from a website, File Transfer Protocol (FTP) source, or MARC records on a local drive					

	Cataloging Functionality	Yes	No	Future	Custom	Add'l Info
196.	Full screen editing of individual MARC records with database update on save (add/delete fields, edit fields and subfields, and replace fields, subfields, item type, call number, location, notes, and status)					
197.	Ability to make global (bulk) changes to MARC and item records (add/delete fields, edit fields and subfields, and replace fields, subfields, item type, call number, location, notes, and status)					
198.	Access and utilize MARC records from a variety of sources, such as vendors and other libraries					
199.	Fully customizable item types, home locations, libraries, class schemes, and categories					
200.	The Library also requests a step-by-step guide to creating original records in your ILS. Show all editing windows available.					
201.	Use formatted coding templates to reduce errors in fixed-field coding					
202.	Provide customizable duplicate detection (call numbers, Online Computer Library Center (OCLC) numbers, ISBNs, item numbers, unique bibliographic identifiers)					
203.	Merge bib records and combine their holding/item records					
204.	Provide a step-by step guide to delete both single and bulk batches of item records from the database as part of the library's withdrawal process, including both records that have fees attached from previous checkouts or attached holds.					
205.	Ability to delete items from database while retaining title information on patron's charge record.					
206.	Ability to retrieve deleted records through title, ISBN, author or barcode					
207.	Automatically verify the headings in any record					
208.	Merge authority records and adjust their linked headings automatically					
209.	Manage links between authority and bibliographic records automatically					

	Cataloging Functionality	Yes	No	Future	Custom	Add'l Info
210.	Ability to create, edit, merge, and delete headings					
211.	Ongoing update of authority headings according to the Library of Congress (LC)					
212.	Globally update authority headings records by any MARC field					
213.	Provide as a one-time service for application of authority control, RDA standards, and FRBR access points to bibliographic database of all MARC records at the time of implementation. The result of this authority control process would be the change of each applicable heading in each MARC record to a current form of entry, and production for each such heading of a corresponding MARC authority record for inclusion in the database of the Integrated Library System; the RDA conversion of all bibliographic records, and the updating and addition of access points in bibliographic records to prepare for a FRBR display in the ILS					
214.	Automatic authority control update services would be provided as periodic services for automatic updates of Authority Records, RDA standards, and FRBR access points in bibliographic and authority database. The result of this update process would be replacement of Authority Records with newer versions of those records, and the update by the ILS of headings in associated MARC records to a current form of entry, and the update of records to meet current RDA and FRBR standards.					

CIRCULATION FUNCTIONS

The Library expects a complete self-service automated model for registration and circulation. Digital and physical materials are to be fully integrated in the proposed system.

	Circulation Functionality	Yes	No	Future	Custom	Add'l Info
215.	Supports ability to assign unique usernames to individual staff members					
216.	Ability to assign permission levels to individual users allowing or disallowing access to features and functions of circulation					
217.	Ability to customize wording and graphics for circulation staff alerts.					
218.	Digital product usage managed and tracked through circulation, including checkouts and renewals.					
219.	Digital product usage recorded as patron activity.					
220.	Allows the Library to set all loan period calculations, loan limits, and thresholds at the branch level, if needed.					
221.	Options for library to determine borrowing privileges based on borrower type, location, or material type.					
222.	Option for staff to activate or de-activate saving loan history in patron account.					
223.	Support floating collections, including defined thresholds by location.					
224.	Supports an unlimited number of item types.					
225.	Ability to search any data point in the patron's record, including notes fields					
226.	Provides an offline function to charge and discharge materials on a circulation workstation or on a portable device and to load these transactions into the on-line circulation system at a later time.					
227.	Mobile circulation can be used inside and outside the library building.					
228.	Provide a mobile circulation platform available for use with a desktop PC, Android device, or iOS device.					
229.	Mobile circulation provides 100% functionality offered by desktop circulation utility.					

	Circulation Functionality	Yes	No	Future	Custom	Add'l Info
230.	Ability to turn RFID on and off with mobile circulation.					
231.	Mobile worklists for Android and iOS devices.					
232.	Mobile worklists provide real time updates.					
233.	Ability to customize layout of receipts for check-out and arrived holds.					
234.	Ability to advertise programs and services, including custom graphics, on the patron's printed receipt.					
235.	Ability to provide receipts at staff workstations, self-checkout, and self-check-in without third party tools or apps.					
236.	Supports printing of multiple receipts for all transactions, receipt to include any transaction notes when applicable					
237.	Ability to provide receipts via multiple options, including email, print, and text					
238.	Supports the ability to print multiple receipts of patron loan history by check out date, title, or author					
239.	Supports missing part check-in functionality.					
240.	Supports check-in grace period to be determined by library system.					
241.	Supports "bookdrop" or rapid bulk check-in to allow minimal staff involvement					
242.	Retains the following check-in information: date, timestamp, title, location, and user. Displays check-in information on check-in screen.					
243.	Ability for staff, per user permissions, to override check-in or check-out date.					
244.	Supports each of the following notice types: overdue, fine, bill, statement of all charges					
245.	Supports the ability to specify which e-mail reminders, such as almost overdue/auto-renew, patron record expiration, hold cancellations, arrived hold and inactive patron, that patrons receive.					
246.	Notification for holds, overdues and courtesy notices, includes all of telephone, print, email and text.					

	Circulation Functionality	Yes	No	Future	Custom	Add'l Info
247.	Option to cascade failed notices to secondary method of communication					
248.	Supports the ability to generate one notification (print, e-mail and/or text notices) for linked patron groups.					
249.	Ability to customize wording and graphics for letters, emails, and text messages the system produces for patron notifications of overdues, holds, lost materials, and other system messages with no interaction with the ILS vendor.					
250.	Ability to determine placement of address and salutation blocks of system-generated letters on common mailing envelopes, mailers, etc.					
251.	Ability to adjust/nudge placement of address/salutation blocks to match envelop windows, if necessary, with no intervention of ILS vendor.					
252.	Supports the ability to retain and print a log of all notices sent to patron. Log should include date, timestamp, notice type, notice format, and contact information.					
253.	Supports an unlimited number of patron types without vendor intervention.					
254.	All fields searchable in customer record, including but not limited to: barcode, last name, first name, registered library, address, phone, e-mail, library defined fields, expiration date, registration date, last activity date, zip code, notes, blocks, birthday					
255.	Displays a patron's last activity date.					
256.	Displays a patron's online activity date. Example: Last time patron accessed an item in a digital collection.					
257.	Ability at the staff member level to view or edit each field in a patron record.					
258.	Allows default values to be set when creating new patron records					
259.	Allows the Library to define the following fields as required: address, birth date, password, and statistical class.					
260.	Ability to set default masking of numbers such as phone and birthdate.					

	Circulation Functionality	Yes	No	Future	Custom	Add'l Info
261.	Supports loading patron photos from a Webcam, a digital camera, device camera, or an existing file and displays photo on the patron's record and check-out screen.					
262.	Accommodates multiple patron addresses in the patron record.					
263.	Accommodates at least two phone numbers in the patron record.					
264.	Patron records support a notes field that allows an unlimited number of characters.					
265.	Patron records support more than one notes field.					
266.	Allow default values to be set differently by age, group, or borrower type					
267.	Supports the ability to integrate with a Driver License scanner to import information into the system.					
268.	Ability to access the complete patron record from check-out screen					
269.	Ability of library to define patron membership term (expiration of patron record).					
270.	Ability for time lapse (example 24 hours), as defined by library), to control and update the patron profile between borrower types.					
271.	Ability to allow a data point to automatically control and update the customer profile as defined by the library system. For example, allowing birth date to change a youth borrower type to a teen borrower type.					
272.	Ability to choose the safeguard fields against duplicate accounts such as first name/last name/birthdate and provides a staff alert when suspected duplicate record found.					
273.	Ability for staff, with correct permission level, to merge duplicate patron records					
274.	Ability when merging patron records to choose which field takes priority.					
275.	Ability to force the deletion of patron records with administration approval.					

	Circulation Functionality	Yes	No	Future	Custom	Add'l Info
276.	Ability to force a batch delete of patron records, with administration approval, that meet certain criteria. Example: long expired patron accounts					
277.	Ability to prevent deletion of patron records based on the following criteria: amount of money owed, items out, items on hold					
278.	Ability to force deletion of patron records with money owed during batch delete process, as approved by library administration					
279.	Ability to block a patron's account for a certain time and then automatically unblock.					
280.	Offers an option for patron self-registration via online form whereby patrons are granted immediate, temporary, and limited privileges as determined by the Library.					
281.	All self-registered patron accounts are automatically marked for address verification pending first library visit.					
282.	Ability to customize the look of the self-registration form to the library's branding and color scheme					
283.	Ability to choose which fields and field options display on the self-registration form. Example: limiting which branches that a patron can choose during the self-registration process.					
284.	Ability to batch add a set of new patron records from an .csv or .xls file. Example: Adding new public school students to the library patron database.					
285.	System creates a staff alert to verify changes to membership information a patron updates in OPAC: name, address, phone number. Alert shows when patron visits library, and staff member accesses the patron account.					
286.	System creates a staff alert to verify patron information when patron renews library account through OPAC. Alert shows when patron visits library, and staff member accesses the patron account.					

	Circulation Functionality	Yes	No	Future	Custom	Add'l Info
287.	System creates a staff alert to verify updated linked patron information. For example, a parent updates information for a linked dependent child. Alert shows when linked patron visits library, and staff member accesses the patron account.					
288.	Supports automatic renewal of items and notification to patrons of renewal status for physical items					
289.	Supports automatic renewal of items and notification to patrons of renewal status for e-content					
290.	Patron record includes field for option to receive publicity from library.					
291.	Allows each Library to determine the method for sending each individual notice, including each separate overdue notice (for example, 1st overdue by e-mail, 2nd by print, etc.)					
292.	Preserves individual patron account, notification and borrowing activity when merging patron records					
293.	Ability to copy details from one membership registration to another. Example: Parent to dependent child					
294.	Supports linking associated patrons (family links)					
295.	Ability for library staff to see current and historical linked family circulation permissions for each patron.					
296.	Connected memberships, with ability to choose relationships, can see items checked out, holds, and fines, and can renew items, pay fines, and cancel or freeze holds					
297.	Supports multiple responsible party family links for dependent accounts					
298.	Supports the ability to designate up to three members of the associated patron's group who can pick up held items for other members of the group					
299.	Supports associated (linked) patron blocking for check-out and renewal based on policy.					
300.	Item status does not change until hold is trapped.					

	Circulation Functionality	Yes	No	Future	Custom	Add'l Info
301.	Ability to link back to the hold from any of the following record screen views: bibliographic, item, or patron					
302.	Supports mobile picklist for staff for Android and iOS devices.					
303.	Allows staff to sort and print selected pick list of holds rather than all holds.					
304.	Allows default holds fulfillment preference to local library.					
305.	Ability for staff to cancel holds.					
306.	Ability for patron to suspend or freeze holds at any point before or during check-in of item.					
307.	Ability for staff to change pickup location at any point before or during check-in of item.					
308.	Supports the ability to place requests for a single title for multiple patrons in one operation, without placing multiple individual requests.					
309.	Supports the ability to place requests for any copy of a title (title level hold), a specific item (item level), or the first available copy of an item in a serial or multi-part set (such as the first available copy of season 1 of a TV series)					
310.	Allows for grouping multiple requests so that when any one is filled, the others in the group are cancelled. (For example, to get the first available copy of any of several Shakespeare plays).					
311.	Supports the ability for staff to transfer hold requests from one title to another.					
312.	Generates a notice to the patron when an item is on hold shelf.					
313.	Generates a notice if a request is cancelled/cannot be filled.					
314.	Option to automatically notify patrons with holds when last copy is deleted.					
315.	Option to automatically notify designated staff members, via email, when last copy is deleted and holds are attached.					
316.	Automatically remove cancelled hold from another branch's message list.					
317.	Automatic prompt to cancel or keep hold if checked out by another patron.					

	Circulation Functionality	Yes	No	Future	Custom	Add'l Info
318.	Allows for complete control by library system of charge types. Includes the ability to hide or show system default charge types or create custom charge types.					
319.	Allows for manually adding a charge to a patron record and include a note.					
320.	Option for Patron type or Material type to determine fines and fees.					
321.	Option to determine fines and fees by collection.					
322.	Ability to define replacement cost of item by applying a flat rate or percentage of item cost to the listed cost in MARC record.					
323.	Supports check-in "free days" (holidays/closed days) set by calendar date.					
324.	Supports ability to set "fine free" days or weeks for special library events. Example Fine Free Week.					
325.	Supports the ability to display (in the staff client, the PAC, and Mobile PAC) an estimated fine amount (accrued fines) for items a patron currently has checked out					
326.	Calculation of outstanding fines, including calculation of what patron owes if outstanding items are returned that day, is available to both staff and patron					
327.	Supports the ability to calculate overdue fine amounts based on the patron's library, item's library, or transacting library					
328.	Ability to calculate a patron's savings based on the patron's current check-out list, using the price based on the item price in the MARC Record.					
329.	Ability to calculate a patron's savings based on the patron's yearly check-out list, using the price based on the item price in the MARC Record.					
330.	Ability to print either/both the patron's current and yearly savings on the patron's check-out receipt, including customized text as determined by the library.					
331.	Allows the Library to block the patron for a threshold amount that is the total of actual fines.					

	Circulation Functionality	Yes	No	Future	Custom	Add'l Info
332.	Ability for staff to reprint a paid receipt.					
333.	Keeps all fine and fee transactions in a patron account history for a library-determined length of time.					
334.	Supports the ability to retain item title data in the patron financial history (charges/payments) even if the item is deleted or the barcode number is changed.					
335.	Ability to integrate with Square credit card service to record financial transactions against a patron's account.					
336.	Ability to configure custom merchant services					
337.	e-commerce capability at staff stations					
338.	e-commerce capability at self-checkout stations					
339.	e-commerce capability at self-check-in stations					
340.	e-commerce capability online via website/catalogue					
341.	e-commerce capability via mobile web					
342.	e-commerce supports Relay Response Whitelisting					

ILL MANAGEMENT FUNCTIONS

The Library expects a system that fully integrates with Auto-Graphics ShareIt software for ILL (Inter Library Loan) functions but will also have basic ILL functionality if Auto-Graphics ShareIt software isn't available.

	ILL Management Functionality	Yes	No	Future	Custom	Add'l Info
343.	Supports NCIP or otherwise integrates with the State of Louisiana ILL ILS vendor for seamless communication between Library ILS and State ILS.					
344.	"Integrated interlibrary loan functionality when requesting items. <ul style="list-style-type: none"> • MARC records translate from AutoGraphics ShareIT to ILS • Allows AutoGraphics ShareIT to access patron data from ILS to lookup users 					
345.	"Integrated interlibrary loan functionality for circulating items. <ul style="list-style-type: none"> • Be able to check out/check in/look up item/renew item • Automatically delete ILL records once items are returned • Allow patrons to return ILL items to any branch, and have the record deleted upon return • Ability to edit NCIP records within ILS while maintaining NCIP status/not causing an error 					
346.	Interlibrary loan information is recorded in patron's account and title information is kept even after item is deleted from database.					
347.	Ability for interface to interoperate with AutoGraphics ShareIT software on staff side					
348.	Ability for interface to interoperate with AutoGraphics ShareIt software on public side					
349.	Support for authentication of library users in ILS user database					
350.	Ability to send ILL overdue and ILL item ready for pickup notifications by email and text message					

	ILL Management Functionality	Yes	No	Future	Custom	Add'l Info
351.	Ability for staff to get a report, for a specific time period, of all current ILL checkouts, as well as those that have been deleted, or have hold/overdue/lost status.					
352.	Ability for staff to add and edit records for ILL items in ILS in order to allow item barcode to be used to check item out to patron					
353.	Ability for staff to delete records used for ILL items in ILS once they are no longer needed					
354.	Ability for ILL staff to place a hold, for items in current ILS, to be used for an ILL account					
355.	Ability to have unique item type used only for ILL item (NCIP)					
356.	Ability to have unique item type for ILL be shadowed within catalog, to prevent patrons from placing holds on ILL items on loan from another library system, but should be visible in ILS					
357.	Ability, based on permission level, to have only ILL staff place a hold on a current ILL item that is checked out to a patron					
358.	Interfaces <ul style="list-style-type: none"> • Interoperates with OCLC • Interoperates with other ILS 					

INVENTORY FUNCTIONS

The Library expects a way to perform inventory will be provided as an integral part of the ILS system. The inventory method should be intuitive for staff to use.

	Inventory Functionality	Yes	No	Future	Custom	Add'l Info
359.	Ability to intuitively use the inventory function					
360.	Ability to perform inventory for all branches, one branch, or specific collections as needed					
361.	Ability to perform inventory over 1 day or multiple days as needed					
362.	Ability to perform inventory at specific branch / location as needed					
363.	Ability to modify parameters for inventory as needed					
364.	Ability to quickly see results of items inventoried, items missing, items not checked in, items in misshelved (wrong collection or branch) within library					
365.	Ability to quickly and intuitively act on any discrepancies found while doing inventory. For example mark many items missing					
366.	Ability to use mobile device to assist in the inventory that performs all or almost all functions as regular inventory					
367.	Ability to upload a file of scanned items to inventory system for inventory processing					
368.	Step by step instructions provided with screen shots for entire inventory process					
369.	Wireless inventory scanners will work with all parts of the inventory software					
370.	Allows the Library to do the following with the inventory utility and device: <ul style="list-style-type: none"> • Download call number ranges for easy shelf comparison • Scan barcodes on shelves or view list of items on shelves • Work in offline mode • Use the utility as a collection weeding tool • Run reports to identify missing, exceptions, or out of place items • Ability to use inventory utility on notepad or similar device 					
371.	Proposers inventory module works seamlessly with industry standard RFID technology, such as RFID inventory wands and portable scanners.					

REPORTS FUNCTIONS

The Library expects that the reporting module can integrate ILS data for comprehensive Library reporting, with little interaction from the ILS vendor.

	Reports Functionality	Yes	No	Future	Custom	Add'l Info
372.	Ability to have unlimited staff users					
373.	Ability to assign granular permissions to users					
374.	Ability to import and export data, in industry standard formats, such as CSV, XLSX, XML, PDF					
375.	Reporting function supports ability to run reports on a historical database, regardless of date, rather than a snapshot of current state of the database.					
376.	Reports and data visualizations incorporate ILS and non-ILS data.					
377.	Incorporates external data from program attendance: <ul style="list-style-type: none"> • Incorporates external data from demographics • Incorporates external data from web analytics • Incorporates external data from people counter • Incorporates external data from GPS information for library users and items, including geocoding • Incorporates external data from other library systems • Incorporates external data from surveys • Incorporates external data from Third party services, including email service providers 					
378.	Ability to report on and access any data available for reporting, including both ILS data and imported, external data					
379.	Makes 100% of the database schema available online to Library staff for purposes of developing custom reports and SQL scripts. If not 100%, please describe extent.					
380.	Offers a wizard reporting software native to utility that allows for report customization on any/every data field by library, without vendor interaction.					
381.	Web-based reports whereby staff could extract the SQL query and use it as a basis for third party reports or direct database editing					
382.	Ability to display data graphically.					

	Reports Functionality	Yes	No	Future	Custom	Add'l Info
383.	Ability for authorized users to create custom reports intuitively without vendor intervention					
384.	Ability for library administration to disable "SAVE" function to prevent staff users from overwriting master reports. Offer SAVE AS functionality instead.					
385.	Ability for library administration to restore a master report if accidentally saved over, without vendor intervention					
386.	Offers a standard set of report templates which include both graphical and numerical visualizations of data, and can be customized by library with no interaction from vendor.					
387.	Ability to schedule reports and send to multiple users via email.					
388.	Ability to schedule reports on hourly, daily, or monthly schedules					
389.	Ability to schedule reports to run with pre-selected parameters as chosen by library					
390.	Reports and visualizations include geographic mapping of users based on several criteria.					
391.	Ability to produce activity and transaction reports based on workstation per day, including choice time period					
392.	Daily updates of holds pull list					
393.	Reports having the ability to provide evidence based collection analysis and evaluation functionality (like Edelweiss)					
394.	Integrates with Edelweiss					
395.	<ul style="list-style-type: none"> • Provides library usage analysis reports • Provides reports for which library materials are used and in which locations • Provides recommendations for purchase, including title subject, author, DDC range, and genre • Provides recommendations for purchase based on hold levels • Provides recommendations for location balancing for floating collections 					
396.	Predictive analysis provides recommendations regarding what to add, remove/eliminate/cancel or change.					

	Reports Functionality	Yes	No	Future	Custom	Add'l Info
397.	<p>Ability to identify and report on patron activity. For example:</p> <ul style="list-style-type: none"> • Report on how categories or demographics of patrons are using library resources • Track visitor and patron activity across multiple interactions • Report on what patrons link to or download 					
398.	Ability to identify patrons within a certain group, like adult, juvenile, teen, staff					
399.	Ability to produce reports on demographics					
400.	<p>Provide reports on patron searches</p> <ul style="list-style-type: none"> • What search terms/subjects patrons search • Where searchers come from, including other sites and item carousels • When/time of day searching occurs • How patrons search (advanced, keyword, uses facets) • What patrons find or don't find in a search • Top search history • Which category/demographic of patrons are searching 					
401.	Ability to identify positive engagements.					
402.	Ability to identify negative engagements such as inactivity or expired cards					
403.	Ability to produce searching reports, including cross-references between data sets.					
404.	Statistics on electronic resources specific to branch patron's use.					
405.	Ability to track website visits and form-fills based on complex behaviors.					

DAY ONE REPORTS FUNCTIONS

In addition to the above functionality for the reports function below is a list of reports that are considered essential and should be in place from day one. These reports are required; however, if there is a similar function that does this instead of running a report then please note this.

For example: We currently must run a daily money report to calculate the funds received the previous working day, including all monetary transactions (cash, check, card) for all types of fine types (overdue, lost book, copies, etc.). The report must show the following fields: date and time of transactions, staff user account and workstation that performed the transaction, patron name, patron barcode, item title, item barcode, charge type, amount tendered, method of payment.

All reports, or similar functions, should have the ability to have the parameters of the report modified, as needed depending on the type of report and results needed, to include / exclude branches, patrons, item types, shelf locations, dates (hourly, daily, weekly, monthly, yearly, previous years), orders, funds, current statuses, fines, fees, expiration dates, cataloged dates, on order, etc.

All reports should also be able to be scheduled or run manually as needed

	Day One Reports Functionality	Yes	No	Future	Custom	Add'l Info
406.	A report, or similar function, to expire available holds that have been on the available hold shelf for specified amount of days.					
407.	A report, or similar function, that lists holds to reroute and/or remove from hold shelf due to patron modifying or canceling hold.					
408.	A report, or similar function, that alerts staff to pull items that need to be trapped for holds.					
409.	A report, or similar function, that alerts staff to pull items that were on order, and just received, that have holds on them.					
410.	A report, or similar function, that alerts staff that a bibliographic record has item holds and all items are lost/missing/damaged status					
411.	A report, or similar function, that removes holds from the system that have never been filled, were cancelled, or otherwise still tied to patron record.					
412.	A report, or similar function to give stats on where the holds were placed: OPAC, ILS, Mobile circ, Mobile App, etc.					
413.	A report, or similar function, that shows the total number of holds that were placed, filled, canceled either daily, weekly, monthly, yearly.					
414.	A report, or similar function, that can list all items with holds for the entire system.					

	Day One Reports Functionality	Yes	No	Future	Custom	Add'l Info
415.	A report, or similar function, that will allow entire record set or smaller subsets to be exported out to 3rd party to send via ftp in order to provide updated information on catalog items availability.					
416.	A report, or similar function, that will generate notices for items that are overdue, and these notices sent either via phone call, text message, or email.					
417.	A report, or similar function, that will generate courtesy notices to alert patrons of upcoming due dates, and these notices sent either via, phone call, text message, or email.					
418.	A report, or similar function, that will generate notices for patrons that have bills and these notices sent either via, phone call, text message, or email.					
419.	A report, or similar function, that will generate notices for items that have available holds and these notices sent either via, phone call, text message, or email					
420.	A report, or similar function, that will generate notices for patrons' privileges that are soon to expire, and these notices sent either via, phone call, text message, or email.					
421.	A report, or similar function, that will generate a list of all patrons, or subset of patrons, in the system.					
422.	A report, or similar function, that will generate a list of newly added patrons to the system.					
423.	A report, or similar function, that will change a group of patron status from ok, delinquent, blocked, barred based on certain settings.					
424.	A report, or similar function, that will list patrons with fines or fees.					
425.	A report, or similar function, that will automatically move patron items to lost or lost assumed and bill the patron for items still checked out after a specified number of days past the original due date.					
426.	A report, or similar function, that will allow individual or batch removal of expired patrons.					
427.	A report, or similar function, that will allow removal of patron charge history if desired.					

	Day One Reports Functionality	Yes	No	Future	Custom	Add'l Info
428.	A report, or similar function, that lists patron records missing essential information in patron record.					
429.	A report, or similar function, that lists patrons with notes in their account, including the note					
430.	A report, or similar function, detailing fines and fees paid, which patron paid, which staff member assisted, and which branch received the fine.					
431.	A report, or similar function, should move items in the location of missing, lost, lost assumed, etc... to the location of discard.					
432.	A report, or similar function, should remove items completely from the system that are in the discard location.					
433.	A report, or similar function, should show all items in transit either to a branch or from a branch.					
434.	A report, or similar function, should show the status of all items for entire system or by branch or within a branch for a shelf location.					
435.	A report, or similar function, should show all items checked out by location, item type, and patron type.					
436.	A report, or similar function, should automatically renew items checked out based on certain criteria.					
437.	A report, or similar function, should notify patrons of items that were auto renewed, and these notices sent either via text message, or email.					
438.	A report, or similar function, should alert staff to items that have been on order for 6 months or more and still haven't been received.					
439.	A report, or similar function, should allow staff to see all aspects of a fund or all funds for this fiscal year or previous years.					
440.	A report, or similar function, should allow staff to see all aspects for a vendor or all vendors for this fiscal year or previous years.					
441.	A report, or similar function, should allow staff to see all aspects for invoices for this fiscal year or previous years.					

	Day One Reports Functionality	Yes	No	Future	Custom	Add'l Info
442.	A report, or similar function, should allow staff to see all aspects for orders for this fiscal year or previous years.					
443.	A report, or similar function, should allow staff to process serials.					
444.	A report, or similar function, should allow staff to import records into ILS for cataloging, acquisitions, serials, or other modules as needed.					
445.	A report, or similar function, should allow staff to view what requests have been submitted by patrons requesting information or requesting an item purchase.					
446.	A report, or similar function, should allow staff to view what ILL requests have been submitted either by staff or patrons, if ShareIt doesn't handle this.					
447.	A report, or similar function, should allow staff to see what serials have or haven't been received for this fiscal year or previous fiscal years.					
448.	A report, or similar function, should allow staff to see what is in locations like missing, discard, lost, repair, cataloging, etc...					
449.	A report, or similar function, should allow staff to see what items were marked as "in house use" or "mark item used" for items used within the library and this list should be able to be daily, weekly, monthly, yearly.					
450.	A report, or similar function, should allow staff to view all items added to catalog, removed from catalog, or edited daily, weekly, monthly, yearly.					
451.	A report, or similar function, should allow staff to see, and count, all registered borrowers.					
452.	A report, or similar function, should allow staff to see, and count, all items in the collection.					
453.	A report, or similar function, should allow staff to see, and count, all circulation.					
454.	A report, or similar function, should allow staff to see, and count, all new items added.					
455.	A report, or similar function, should allow staff to see, and count, all items removed.					
456.	A report, or similar function, should allow staff to see, and count, all bills paid.					

	Day One Reports Functionality	Yes	No	Future	Custom	Add'l Info
457.	A report, or similar function, should allow staff to see, count, and remove paid bills for a certain period.					
458.	A report, or similar function, should allow staff to see, and count all items that were renewed.					
459.	A report, or similar function, should allow staff to look at transactions on particular patron, item, or staff member either live (things that were done today) or a history (things that were prior to today)					

SERIALS FUNCTIONS

The Library expects a seamless tracking solution for the serial's module, with limited staff interaction once the parameters are established

	Serials Functionality	Yes	No	Future	Custom	Add'l Info
460.	Ability to automatically send claimed missing issues to serials management vendor, as per configured parameters, with no staff intervention					
461.	Report of missing issues automatically generated					
462.	Ability to report missing issues.					
463.	Ability to create frequency of serials templates					
464.	Ability to utilize frequency information from vendor to automatically create check-in boxes					
465.	Display of serials holdings data in other modules (ex. Issues in Catalog)					
466.	Accommodate and link title variations					
467.	Accommodate and link multiple formats of the same title (print, fiche, electronic)					
468.	Hyperlink to e-version of journal					
469.	Flexible, customizable display of call number and location					
470.	Share Proposer records with acquisitions module					
471.	Share fund records with acquisitions module					
472.	Support automatic or mediated claims and cancellations in email or print formats <ul style="list-style-type: none"> • Manually, via email • Manually, via printouts 					
473.	Ability to utilize frequency information from vendor to automatically create check-in boxes					
474.	Ability to apply barcode numbers to the physical issue while checking-in.					

MIGRATION AND SUPPORT

Professional and available support is required once the system is live and functional. Data record counts can be found in Section 1.3 Statistics and Record Counts.

	Migration and Support Functionality	Yes	No	Future	Custom	Add'l Info
475.	Work flow analysis is available and conducted before migration of data and before system parameters are established					
476.	Easy and complete migration of Patron, Item Data and bibliographic data from The Library Corporation Library.Solution 4.2					
477.	Data migration plan, with chronological timeline, provided to library by Proposer.					
478.	Data migrated in a secure fashion, using industry standard encryption.					
479.	Availability of tools to convert/upgrade MARC data for increased discoverability, including BibFrame, Linked Data, or another future cataloguing schema					
480.	Documentation is accessible for all ILS and catalog functions					
481.	Keyword accessible help pages with step by step Instructions					
482.	Training, whether onsite or online, is provided for all functionality, including system administration and configuration					
483.	Staff authorization is role based, and can be customized					
484.	Proactive alerts are provided regarding system and software issues					
485.	Known issues are published with up-to-date notes					
486.	Regular updates on open tickets are provided to ticket creator					
487.	Ability for multiple people (role based) to create help tickets					
488.	Ability for multiple people (role based) to view all help tickets past and current					
489.	Clear escalation process is provided for unresolved issues					
490.	Included password recovery feature through email					

	Migration and Support Functionality	Yes	No	Future	Custom	Add'l Info
491.	On-going separate test environment for ILS is provided to try and test settings and configuration, as well as training. Test environment should include admin settings utility, catalog utility, and circulation utility, at a minimum.					
492.	System allows staff to change their own password with option to require override password					

SYSTEM FUNCTIONS

The Library requires the ability to apply customizations to the system for both branding and security purposes.

	System Functionality	Yes	No	Future	Custom	Add'l Info
493.	Hosted solution offers choice of shared or dedicated hosting and is sole decision of LPL which hosting solution to choose.					
494.	MS SQL database environment with complete open access					
495.	Offers SQL training to customer to write custom reports					
496.	Ability to distinctly brand and customize options for staff and public interfaces					
497.	Development cycle that is responsive to known issues and enhancements					
498.	Notice of software update or System Maintenance via email provide a minimum of 48 hours in advance					
499.	Software as a Service (SaaS) Facility has a secure back up power supply					
500.	SaaS Facility has a fire suppression system					
501.	SaaS Facility has fully secure access and provides onsite security personnel					
502.	SaaS server is configured for 99.9% availability, including detailed plan of how Proposer handles unexpected downtime and restoring access					
503.	SaaS server is monitored by Proposer for disk space, memory usage, Central Processing Unit (CPU) utilization and process status					
504.	All the data held in the ILS should be encrypted. This includes "data at rest" and "data in motion". All backups should be encrypted					
505.	Provide access to detail disaster recovery before go live date					
506.	Proposer takes legal and financial responsibility for breaches of security of sensitive data, i.e. library patron data					
507.	Automatic regular backups					
508.	Software regularly updated and upgraded with minimal impact on service					
509.	Security measures are included to minimize chance of fraudulent activity or access					
510.	Customer information and backups remain in the United States					

	System Functionality	Yes	No	Future	Custom	Add'l Info
511.	ILS Client compatible with Microsoft Windows 10					
512.	Backups daily, weekly					
513.	System backup performed by Proposer					
514.	Ability to create logs such as audit, event, transaction					
515.	Ability to search and view logs such as audit, event, transaction					
516.	Ability to roll back server in the event of system or human error					
517.	SaaS Solution automates regular administration tasks such as but not limited to: <ul style="list-style-type: none"> • Backups • Daily updates of holds pull list • Daily blocking of delinquent accounts • Daily notice creation 					
518.	Granular security that can be applied to each user account					
519.	Ability to customize the staff interface					
520.	Ability to customize the public interface					
521.	Ability to maintain customizations with upgrades					
522.	Ability to add and integrate Application Program Interface (API)s, which are RESTful compliant					
523.	Documentation for API integration and usage examples					
524.	Ability to create individual logins for each staff user with multi-level permissions for functionality and data viewing in each utility/module of the ILS offered by the Provider					
525.	Allows staff to access multiple modules of the system through a single interface					
526.	Use natural language to describe functions (e.g. check-in, check out, etc.) or the ability to edit					
527.	Uses standard Windows copy/cut/paste keyboard commands					
528.	If awarded Request for Proposal (RFP) must supply a Holiday closure schedule					
529.	Ability to add and subtract locations without additional cost					
530.	SaaS Solution provides method for automating regular administrative tasks such as but not limited to: Flag patron records when email bounce notice received; suppress email notices once a notice bounce flag has been set					

	System Functionality	Yes	No	Future	Custom	Add'l Info
531.	Authentication of staff accounts using Active Directory for a Single Sign-on Environment, at no additional charge					
532.	Ability to make mass changes to staff user accounts.					
533.	Ability to force password resets or force password changes to one, a group, or all user accounts.					
534.	The ability to integrate Geographic Information System for address verification					
535.	24 X 7 Support					
536.	Ability to add and subtract SIP and/or NCIP licenses without additional cost					
537.	SaaS must allow for location-based software access or not as required (ie white-listing)					
538.	System provides a responsive public interface offering full searching and patron self-service options					
539.	Web-based applications of system utilize HTML 5 standards					
540.	Ability for authorized staff user to add cell service providers for SMS text messaging for patron notifications.					
541.	Radio Frequency Identification (RFID) compatible					
542.	Offline mode available for check-in, check-out functions when connection to database is down/unavailable					
543.	SSH Certificate for site and PAC					
544.	Agrees to sign a contract with Livingston Parish Library and Livingston Parish School Board to protect student privacy for student and teacher eCard accounts					

Attachment B

1. Compatibility Checklist – Equipment, Software, and Standards

Please indicate compliance with each by checking either a YES or NO answer. A 'YES' answer indicates 100% compliance with the entire statement. Explain all 'NO' answers in the deviation section. To provide additional information about any of the items listed, please include in separate document that clearly indicates item number and item name to which the supporting material refers.

1.	Equipment, Software, and Standards	Yes	No	Deviation
2.	Epson Thermal Receipt Printers			
3.	Touch screen catalogs for public use			
4.	Ability to read 14-digit Codabar Library Cards			
5.	Ability to read 14-digit Codabar Item Barcode labels			
6.	Microsoft Windows, latest version			
7.	Centurion Shield software for public and PAC PCs			
8.	z39.50 Client and Server			
9.	Session Initiation Protocol (SIP)2			
10.	Niso Interchange Protocol (NCIP)			
11.	Application Programming Interface (API)s			
12.	Peripheral Component Interconnect (PCI) compliance for all financial transactions			
13.	MAchine Readable Cataloging (MARC)21 / National Information Standards Organization (NISO) standard			
14.	Dublin-C / NISO Standard			
15.	Resource Description and Access (RDA) / NISO standard			
16.	Integrated Accelerated Reader (AR)/Lexile Measure			
17.	Demco Signup & Spaces			
18.	EBSCO Library Aware Newsletters			
19.	EBSCO Stacks Website manager			
20.	EBSCO Novelist			
21.	Bibliotheca CloudLibrary eContent service			
22.	hoopla by Midwest Tape eContent service			
23.	RBDigital by Recorded Books eContent Service			
24.	Lynda.com			
25.	Ingram iPage			
26.	Baker & Taylor Titlesource 360			
27.	Midwest Tape			
28.	Syndetics Solutions			
29.	Short Message Service (SMS) text service			
30.	Rivistas serial subscription management			

ATTACHMENT C - REFERENCES

Current Clients

A successful proposal will include at least three (3) current business references who have received services from your company using this form. Please include libraries of similar size to LPL and closest geographical location, if applicable. References must include library name and address as well as the name, email address, and phone number of the contact person. The Library is especially interested in public libraries in Louisiana operating your system as proposed.

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Past Clients

Please include at least three (3) past business references who have received services from your company and whom you no longer provide service. Please include libraries of similar size to LPL and closest geographical location, if applicable. References must include library name and address as well as the name, email address and phone number of the contact person. The Library is especially interested in public libraries in Louisiana who were operating your system as proposed.

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Cost Proposal (Attachment D)**RFP-2019-LPL-ILS****Vendor:** _____

Hosting and Licensing Fees	Initial Cost + Year 1	Year 2	Year 3	Year 4	Year 5 and four years thereafter
Software as a Service (SaaS) Hosting Fee					
Staff Client Software for use by 90 (ninety) concurrent users					
Total Cost Per Year					
Module, Interface, and Integration Fees	Initial Cost + Year 1	Year 2	Year 3	Year 4	Year 5 and four years thereafter
Cataloging Module					
Authority Control Module					
Authority Control Processing (if available)					
Circulation Module					
Multilingual Online Public Access Catalog (OPAC)					
OPAC, unlimited users, in library & over the internet					
Acquisitions Module					
Reporting Module					
Serials Control Module					
Integration with Online Computer Library Center CatExpress (batch and individual bibliographic records) or other bibliographic utility					
Integration with Bibframe					
Integration with self-checks					
Integration cost of Third-Party Products (APIs if applicable)					
Interlibrary Loan Module (ILL)					

Cost Proposal (Attachment D)**RFP-2019-LPL-ILS****Vendor:** _____

Electronic Data Interchange (EDI) for Acquisitions					
Offline Circulation					
Mobile Circulation					
Discovery Service					
Enhanced Record Content (Syndetics or other)					
Inventory Module					
e-Resource integration (eBooks and electronic databases)					
Browser based staff client software for use by up to ninety (90) concurrent users					
Session Initiation Protocol (SIP2) interfaces					
National Circulation Interchange Protocol (NCIP) interfaces					
Z39.50 client/server					
e-Commerce for Public					
e-Commerce for Staff					
Interface with Unique Management Collection Agency					
Patron Notification via text					
Patron Images					
Patron Digital Signature					
Total Cost Per Year					

Data Extraction/Migration Services	One Time Cost				

Cost Proposal (Attachment D)**RFP-2019-LPL-ILS****Vendor:** _____

Bibliographic					
Item					
Authority					
Patron					
Circulation Transactions					
Fines and Block Records					
Hold Records					
Reports					
Serials					
Acquisitions Proposers and funds					
Patrons saved lists					
Total Cost					



**Proposal Form
RFP-2019-LPL-ILS
Livingston Parish Library**

Please read entire proposal carefully and ensure that all requirements have been addressed. By signing this proposal, the proposer certifies compliance with all instructions to proposers, terms, conditions and specifications, and further certifies that this proposal is made without collusion or fraud. This proposal is to be manually signed in ink by a person authorized to bind the vendor. All proposal information shall be made with ink or typewritten. Any cost incurred by the vendor in preparing or submitting the Proposal are the responsibility of the Vendor and will not be reimbursed by Livingston Parish Library or its governing authority. This proposal form must be signed and included with the sealed proposal package.

Company:	
Federal I.D. Number	
Mailing Address:	
Signature of Agent (must be signed):	
Date of Agent Signature:	
Printed Agent's Name:	
Telephone:	
Fax Number:	
E-mail Address:	
Website:	

**LIVINGSTON PARISH LIBRARY BOARD OF CONTROL
CONTRACT FOR INTEGRATED LIBRARY SYSTEM FOR THE
LIVINGSTON PARISH PUBLIC LIBRARY SYSTEM**

STATE OF LOUISIANA

PARISH OF LIVINGSTON

THIS AGREEMENT is hereby made and entered into this ____ day of _____ 2019, by and between the LIVINGSTON PARISH LIBRARY BOARD OF CONTROL, hereinafter referred to as "LIBRARY", an independent agency of Livingston Parish Government, represented herein by its duly authorized president, Ronald Bencaz, and _____, hereinafter referred to as "CONTRACTOR" and represented by its duly authorized _____ (Title), _____.

WHEREAS, the LIBRARY has solicited, received and analyzed competitive Requests for Proposals for an integrated library system provided as software as a service (SaaS) for use by the Livingston Parish Public Library System and the citizens of Livingston Parish, identified as Livingston Parish Library Project No. RFP-2019-LPL-ILS, which is the legal responsibility of the LIBRARY, and

WHEREAS, the LIBRARY has duly awarded the CONTRACTOR as the successful proposer for the referenced activity, products and/or services as hereinafter set forth and in accordance with all local, state, and federal regulations governing the expenditure of public funds as discussed in Section 3 below, and

WHEREAS, the LIBRARY considers the public benefit of having an integrated library system to help provide the citizens of the Livingston Parish and the Library System with reading materials for both educational and entertainment purposes to be proportionate to the costs associated with this activity, and

WHEREAS, the CONTRACTOR shall provide all materials, equipment and labor and perform all the work required to accomplish the designated scope of work in a thorough and workmanlike manner to the satisfaction of the LIBRARY and in accordance with all plans and specifications, instructions, general and/or standard terms and conditions, any addenda issued, and the "Request for Proposal" documents, (where applicable) on file with the LIBRARY, which are as much a part of this agreement as if repeated verbatim herein.

NOW THEREFORE, the LIBRARY and the CONTRACTOR do mutually agree to the following terms and conditions of this agreement:

1. Scope of Work

The LIBRARY hereby agrees to engage the CONTRACTOR to host and manage an integrated library system for use by the Livingston Parish Public Library System. The PARISH will own all of the data and multiple users, (not less than one hundred fifty (150), will be allowed access. The CONTRACTOR will be responsible for all labor, equipment, tools, supplies, and transportation required to install and maintain the software for the system. The CONTRACTOR will also be responsible for providing proper training and technical assistance to the LIBRARY. The LIBRARY will provide the CONTRACTOR with project work orders, if necessary.

Any additional products and/or services not specifically listed but required by the LIBRARY and available to the CONTRACTOR may be added to the terms of this agreement at a mutually agreed upon price, subject to the verification of cost reasonableness of said change order.

2. Term of Agreement

The initial term of this agreement shall commence upon execution of this agreement and shall continue until the completion of the project listed in the Scope of Work and all payments have been made. The CONTRACTOR will begin performance within thirty (30) days after receiving the work order or "Notice to Proceed" and have the system fully operational by January 31, 2020.

If the time frame extends beyond this period then the CONTRACTOR will notify the LIBRARY as to the new expected completion date and the reason for the delay and obtain approval from the LIBRARY for the revised time period, which is subject to the requirements identified in the plans and specifications, instructions, general and/or standard terms and conditions, any addenda issued, and the "Request for Proposal" documents, where applicable.

This agreement may be renewed automatically for ten (10) successive one year periods unless either party gives written notice of its intent to not renew this agreement at the same prices, terms and conditions except that a price adjustment based on the Consumer Price Index (CPI), not to exceed five (5) percent, may be considered, at the sole discretion of the PARISH, in the fifth (5th) year of the agreement and each fifth (5th) year thereafter.

3. Payment Terms

Under this agreement, the LIBRARY agrees to pay the CONTRACTOR the following amounts which are inclusive of all amounts properly due under the terms and conditions set forth in the "Request for Proposal" documents and attached as Exhibit A:

- a. Hosting and licensing fees in the amount of _____ dollars (\$_____) which is inclusive of the initial cost and first year subscription

including maintenance service, and support fees to be billed annually with the first billing submitted upon proper installation of the software and successful use by the PARISH.

- b. Module, Interface, and Integration fees in the amounts shown on Exhibit A to be billed annually. First billing shall not occur before software is in use by the LIBRARY.
- c. Data extraction and migration services in the amount of _____ dollars (\$ _____) to be billed upon completion of data extraction and migration.
- d. Annual recurring and fixed costs for maintenance service, support, and products utilized in Exhibit A for up to four (4) years after the initial year of software, in the amounts shown on Exhibit A to be billed annually.
- e. Initial onsite training costs of _____ dollars (\$ _____) to be billed upon completion of the training. Any additional onsite training after the initial training will be billed upon the completion of the additional training and in accordance with the rates on Exhibit A.

At the LIBRARY'S option, any of the other options/services denoted on Exhibit A may be implemented by the LIBRARY and included this agreement. The above prices as well as those identified in Exhibit A shall remain the same except that a price adjustment based on the Consumer Price Index (CPI), not to exceed five (5) percent, may be considered, at the sole discretion of the LIBRARY, in the fifth (5th) year and each fifth (5th) year thereafter.

For all respective invoices the LIBRARY will, in all good faith, attempt to review and process for payment within a reasonable time period.

If this agreement extends beyond the current fiscal year and notwithstanding anything to the contrary and when applicable, the CONTRACTOR acknowledges and agrees that pursuant to the applicable state law, this agreement is subject to an annual appropriation dependency requirement to the effect that the renewal of this agreement is contingent upon the appropriation of funds to fulfill the requirements of this agreement. If the LIBRARY fails to appropriate sufficient monies to provide for payments under this agreement, then this agreement shall terminate on the last day of the last fiscal year for which funds were appropriated.

4. Amendments and Assignments

If there is a need to review and/or revise this agreement, the requesting party shall comply with the provisions of the "Request for Proposal" documents. If the "Request for Proposal" documents are silent with respect to amendments then the requesting party shall submit a written amendment to the other party, with the understanding that no amendment to this agreement shall be valid unless it is agreed and signed by both parties. This agreement shall not be assignable by either party without written consent of the other, except for assignment resulting from merger, consolidation, or reorganization of the assigning party.

5. Records and Audits

For audit purposes, all records will be made available by both parties to any authorized representative of either party and said records will be retained for three (3) years from the final contractual payment under this agreement. It is also agreed that all records shall be made available to either party at no additional charge for such information. If any confidential information is obtained during the course of this agreement, both parties agree not to release that information without the approval of the other party unless instructed otherwise by court order, grantor, auditor, public information request or as required by law.

6. Liability, Indemnity and Insurance

The CONTRACTOR shall perform its scope of services hereunder in accordance with all plans and specifications, instructions, general and/or standard terms and conditions, any addenda issued and the "Request for Proposal" documents, where applicable, as well as complying with all applicable laws and regulations. All products and/or services will be provided or performed in a thorough and workmanlike manner to the satisfaction of the LIBRARY.

This agreement is intended for the benefit of the LIBRARY and the CONTRACTOR and does not confer any rights upon any other third parties. All rights by and between the LIBRARY and the CONTRACTOR are limited to the actions outlined in the applicable local, state and federal laws, regulations and policies.

The CONTRACTOR will indemnify, defend, and hold harmless the LIBRARY, including the LIBRARY's employees and agents, from and against any and all claims or liabilities arising from the fault of the CONTRACTOR, its employees, subcontractors or agents in carrying out the CONTRACTOR'S duties and obligations under the terms of this agreement. The LIBRARY will indemnify, defend, and hold harmless the CONTRACTOR, including the CONTRACTOR's employees and agents, from and against any and all claims or liabilities arising from the fault of the LIBRARY, its employees or agents in carrying out the LIBRARY's duties and obligations under the terms of this agreement. This section will survive the termination of this agreement. In the event that either party takes any action to enforce this mutual indemnity provision, the prevailing party shall be entitled to recover reasonable attorney's fees and costs arising as a result thereof.

The CONTRACTOR will comply with the insurance requirements as specified in the "Request for Proposal" documents and attached as Exhibit B. Evidence of compliance with the attached insurance requirements will be provided to the LIBRARY prior to the commencement of any work.

If specified in the "Request for Proposal" documents, the CONTRACTOR is also required to provide the appropriate Performance Bond in an amount equal to 100% of the contract amount, estimated currently to be \$ _____. The CONTRACTOR is also required to maintain all licenses as may be required by any regulatory agency.

7. Independent Contractor Status

The CONTRACTOR shall provide the services contemplated under this agreement as an independent contractor and not as an employee, agent, joint venturer, subcontractor or partner of the LIBRARY. Nothing in this agreement shall be construed as creating any other relationship between the CONTRACTOR and the LIBRARY, or between any employee, agent, joint venturer, subcontractor or agent of the CONTRACTOR and the LIBRARY. During the term of this agreement, all persons employed by CONTRACTOR shall be an employee of the CONTRACTOR for purposes of the CONTRACTOR's benefit programs for plans now existing or hereafter created, workers' compensation, compensation, and payment and withholding of federal, state and local income, social security, unemployment, Medicare, and other payroll taxes.

The CONTRACTOR acknowledges that he is an independent contractor within the meaning of Louisiana workers' compensation law, specifically *Louisiana Revised Statute 23:1021(6)*. The CONTRACTOR is rendering a service, other than manual labor, for a specified recompense for a specified result either as a unit or as a whole, under the control of the LIBRARY as to the result of his work only, and not as to the means by which such result is accomplished.

8. Warranties, Termination of Agreement and Dispute Resolution

The CONTRACTOR warrants the following: (a) that it has the experience and ability to perform the scope of work required in this agreement, (b) that it will perform said scope of work in a professional, competent and timely manner, (c) that its services, reports and materials furnished hereunder will be as represented, (d) that it has the power to enter into and perform this agreement, and (e) that its performance of this agreement shall not infringe upon or violate any third party's rights or any federal, state or municipal law, including the proper handling of any waste disposals that may result from the services provided herein.

While both parties agree to negotiate all contractual disputes in good faith, the LIBRARY reserves the right to terminate this agreement at any time and for any reason, with or without cause, upon written notice of termination, in which event the CONTRACTOR will be reimbursed for all activity, products and/or services satisfactorily provided up until the date of termination. Either party may terminate this agreement "for cause" with written notice to the other party within fifteen (15) days stating the cause for termination. Upon receipt, the other party shall have thirty (30) days to satisfactorily remedy, correct or remove the cause for termination. If the notice of termination is by the LIBRARY then the LIBRARY may withhold payment of any costs and fees related to, arising from or incidental to the stated cause or causes for termination.

If the parties are unable to independently and satisfactorily resolve any disagreement then both parties agree that any contractual disagreement will be resolved under the jurisdiction of the 21th Judicial District Court for Livingston Parish, Louisiana. In addition, if it is necessary to enforce

this agreement in any judicial forum, then the parties agree that whoever prevails in the litigation shall be entitled to reasonable attorney's fees and costs as fixed by the Court.

9. SEVERABILITY, ENTIRE AGREEMENT AND CAPTIONS

This agreement shall be governed by and construed in accordance with the laws of the State of Louisiana. If any provision of this agreement is held invalid, void or unenforceable under any law or regulation or by a court of competent jurisdiction, such provision will be deemed amended in a manner which renders it valid, or if it cannot be so amended, it will be deemed to be deleted. Such amendment or deletion will not affect the validity of any other provision of this agreement. This agreement, any attached documents, and any referenced documents, including the "Request for Proposal" documents, represent the entire agreement between the LIBRARY and the CONTRACTOR and supersede all prior negotiations, representations or agreements, either written or oral. In the event of a conflict between this agreement and other documents, the terms of this agreement shall control.

Each paragraph of this agreement has been supplied with a caption to serve only as a guide to the contents. The caption does not control the meaning of any paragraph or in any way determine its interpretation.

10. No Authorship Presumptions

The LIBRARY and the CONTRACTOR have had an opportunity to negotiate the language of this agreement in consultation with legal counsel prior to its execution. No presumption shall arise or adverse inference be drawn by virtue of authorship. The LIBRARY and the CONTRACTOR hereby waive the benefit of any rule of law that might otherwise be applicable in connection with the interpretation of this agreement, including but not limited to, any rule of law to the effect that any provision of this agreement shall be interpreted or construed against the party who (or whose counsel) drafted that provision. The rule of no authorship presumption set forth in this paragraph is equally applicable to any person that becomes a party by reason of assignment and/or assumption of this agreement and any successor to a signatory party.

11. Address of Notices and Communications

All notices between the LIBRARY and the CONTRACTOR provided for pursuant to this agreement shall be in writing. The name and address of the LIBRARY'S representative is:

Mr. Giovanni Tairov, Director
Livingston Parish Library
P.O. Box 397
Livingston, Louisiana 70754

The name and address of the CONTRACTOR'S representative is:

In the event that the mailing address of the LIBRARY or the CONTRACTOR changes during the terms of this agreement, or that there is a change in the designated points of contact, the party with the address change or change of contact shall immediately notify the other party of the change.

[The remainder of this page is intentionally left blank.]

THUS DONE AND SIGNED on the _____ day of _____, in Livingston, Louisiana, and in the presence of the undersigned witnesses and Notary Public, after a due reading of the whole.

WITNESSES:

LIVINGSTON PARISH LIBRARY
BOARD OF CONTROL

Witness Signature

Ronald Bencaz, President

Printed Witness Name

Witness Signature

Printed Witness Name

NOTARY PUBLIC

Notary Printed / Stamped Name
and Identification Number

THUS DONE AND SIGNED on the _____ day of _____, in _____,
and in the presence of the undersigned witnesses and Notary Public, after a due reading of the whole.

WITNESSES:

[INSERT CONTRACTOR'S NAME:]

Witness Signature

[Insert Officer's Name]

Printed Witness Name

Witness Signature

Printed Witness Name

NOTARY PUBLIC

Notary Printed / Stamped Name
and Identification Number

Livingston Parish School System Contract With The Library Corporation

This contract is made and entered into by and between Livingston Parish School System, represented by its Superintendent, [NAME], and [NAME OF ILS VENDOR], represented by _____, as a cooperative endeavor by and between those entities to provide library card to every student in the Livingston Parish School System. Livingston Parish School System will be regularly uploading its student data to Livingston Parish Library's system maintained by The Library Corporation, and each child's student ID number will become their library account number and allow them to access the library's electronic resources. After a year-long pilot program, the aim is to convert all of the e-cards to full-fledged library cards.

The Library Corporation agrees to comply with the Louisiana Database Breach Notification Law (Act 499) and all applicable laws that require the notification of individuals in the event of unauthorized release of personally identifiable information or other event requiring notification. In the event of a breach of any of The Library Corporation's security obligations or other event requiring notification under applicable law, The Library Corporation agrees to notify the Livingston Parish School System within 24 hours of a breach incident, regardless of whether or not the breach has been resolved, and assume responsibility for informing all such individuals in accordance with applicable law. The Library Corporation will indemnify, hold harmless, and defend the Livingston Parish School System and its employees from and against any claims, damages, or other harm related to the notification event, but only to the extent that any such claims, damages, or other harm was caused by the fault of The Library Corporation. Livingston Parish School System will remain responsible for any claims, damages, or other harm caused by the fault of Livingston Parish School System, and any other individuals or entities will remain responsible for any claims, damages, or other harm caused by their fault.

The Library Corporation agrees that upon termination of its Agreement it shall return all data to Livingston Parish School System in a useable electronic form, and erase, destroy, and render unreadable all Livingston Parish School System data in its entirety in a manner that prevents its physical reconstruction through the use of commonly available file restoration utilities, and certify in writing that these actions have been completed within 30 days of the termination of this Agreement or within 7 days of the request of an authorized agent of Livingston Parish School System, whichever shall come first.

The Library Corporation and Livingston Parish School System acknowledge that unauthorized disclosure or use of the protected information may irreparably damage Livingston Parish School System in such a way that adequate compensation could not be obtained from damages in an action at law. Accordingly, the actual or threatened unauthorized disclosure or use of any protected information resulting from fault on the part of The Library Corporation shall give Livingston Parish School System the right to seek injunctive relief against Livingston Parish Library restraining such unauthorized disclosure or use, in addition to any other remedy otherwise available. However, that right does not apply to any actual or threatened unauthorized disclosure or use of any protected information resulting from fault on the part of any individual or entity other than The Library Corporation. For any such actual or threatened unauthorized disclosure or use of any protected information resulting from fault on the part of any individual or entity other than The Library Corporation, Livingston Parish School System would instead have to take such action directly against that individual or entity.

The Library Corporation must have established and implemented a clear data breach response plan outlining organizational policies and procedures for addressing a breach, which is an essential step in protecting the privacy of student data. Prompt response is essential for minimizing the risk of any further data loss and, therefore, plays an important role in mitigating any negative consequences of a breach, including potential harm to affected individuals. A data breach is any instance in which there is an unauthorized release or access of personally identifiable information or other information not suitable for

public release. This definition applies regardless of whether an organization stores and manages the data directly or through a contractor, such as a cloud service provider.

The Library Corporation is permitted to disclose confidential information to its authorized subcontractors, agents, consultants and auditors on a need to know basis only, provided that all such subcontractors, agents, consultants and auditors have written confidentiality obligations to vendor and Livingston Parish School System.

The confidentiality obligations shall survive termination of any agreement with The Library Corporation Library for a period of fifteen (15) years or for so long as the information remains confidential, whichever is longer, and will inure to the benefit of Livingston Parish School System.

During the 2014 Louisiana Legislative Session, the State of Louisiana enacted new laws governing the collection, disclosure and use of students' personally identifiable information. The new laws require that any contracts between a school system and a third party, who is entrusted with personally identifiable Information or any student, contain the statutorily prescribed minimum requirements as to the use of personally identifiable information.

Sensitive information must be protected at a level that can ensure that only those who are authorized to view the information are allowed access (secure passwords, encryption, etc.) The Library Corporation's network must maintain a high level of electronic protection to ensure the integrity of sensitive information and to prevent unauthorized access in these systems. Regular review of the protection methods used and system auditing are also critical to maintain protection of these systems. The Library Corporation agrees to protect and maintain the security of data with protection security measures that include maintaining secure environments that are patched and up to date with appropriate security updates.

In order to ensure that only appropriate individuals and entities have access to personally identifiable student data, organizations must implement various forms of authentication to establish the identity of the requester of the information with a level of certainty that is commensurate with the sensitivity of the data. Each organization must individually determine the appropriate level of assurance that would provide, in its specific environment, reasonable means of protecting the privacy of student data it maintains. No individual or entity should be allowed unauthenticated access to computer systems storing confidential personal identifiable student records or data at any time.

The Library Corporation shall implement appropriate measures designed to ensure the confidentiality and security of personally identifiable information and protect against any anticipated access or disclosure of information in its custody.

The Library Corporation agrees that any and all Livingston Parish School System personally identifiable student data will be stored, processed, and maintained solely on designated servers and that no Livingston Parish School System data at any time will be processed on or transferred to any unencrypted portable or laptop computing device or any portable storage medium unless that storage medium is in use as part of The Library Corporation's designated backup and recovery processes. All servers, storage, backups, and network paths utilized in the delivery of the service shall be contained within the states, districts, and territories of the United States unless specifically agreed to in writing by a Livingston Parish School System employee with signature authority.

The Library Corporation agrees that any and all data exchanged with Livingston Parish School System shall be used expressly and solely for the purposes enumerated in the Agreement. Data shall not be distributed, repurposed, or shared across other applications or business units of The Library Corporation. As required by Federal and State law, The Library Corporation further agrees that no data of any kind shall be revealed, transmitted, exchanged or otherwise passed to other vendors or interested parties.

This contract becomes effective on the ____ day of _____, 2018, and is for a period of ____ years. The term of the contract may be extended by agreement of the parties.

This agreement may be canceled by either party with a written notice of its intention to cancel the contract to the other party within sixty (60) days prior to the effective date of the cancellation.

This contract was executed in duplicate original at Livingston, Louisiana, on the ____ day of _____, 2018.

[NAME]
Superintendent
Livingston Parish School
System

Representative's Name
Position
Company

SAMPLE

Livingston Parish Library - Insurance Requirements for Projects over One Hundred Thousand Dollars and Greater

Section A – Types of Coverage Required

Where applicable, any **Contractor, Subcontractor, Consultant, Architect, Engineer, Other Professional or Vendor (hereinafter referred to as Contractor collectively)**, who performs services for the Owner in the amount of one hundred thousand dollars or greater shall maintain the following insurance coverage with insurance companies acceptable to the Owner. Those insurance companies must be rated in the current A.M. Best Rating Guide with an "A-" rating or better. In the event that insurance requirements are included elsewhere within any other procurement documents, the requirements contained within this article shall supersede any such reference.

In connection therewith, the Contractor agrees to provide to the Owner, at the Contractor's expense and prior to any entry on the Owner's property, proof of liability insurance coverage set forth. The Contractor agrees to furnish to the Owner certificates evidencing said insurance coverage for the full term of this agreement which certificates shall name the Owner as an additional named insured on all policies except errors and omissions policies and shall provide for thirty (30) days advanced written notice to the Owner in the event of cancellation or alteration of the policies.

The Contractor agrees to maintain the coverage limits and endorsements as listed herein. The Contractor's obligation to provide the required insurance will not be waived by the Contractor's failure to provide the certificate of insurance, the Owner's acceptance of a certificate of insurance showing coverage varying from the required coverage, or the Owner's allowance to commence work.

No work shall commence under any contract until the following insurance coverage is obtained by the Contractor:

(1) Worker's Compensation

(a) Standard Louisiana Coverage (Always Required) - Worker's Compensation coverage:

- (i) should cover all employees, including owners, (ii) must be statutory for medical and indemnity and (iii) should have a minimum limit for employer's liability of:

Employer's Liability -	\$1,000,000 each accident
	\$1,000,000 each employee - disease
	\$1,000,000 policy limit – disease

(b) Maritime Coverage

Required Not Required

When specifically required by the Owner (as denoted with an "X" in the above "Required" box), the Contractor shall procure and maintain during the life of this contract a Worker's Compensation Policy specifically covering maritime activities. The scope of the project will determine whether maritime insurance is required but if the project is going to be performed over any body of water then this separate coverage should be obtained.

Livingston Parish Library - Insurance Requirements for Projects over One Hundred Thousand Dollars and Greater

(2) Contractor's Liability Insurance (Always Required)

(Note term Contractor refers collectively, where applicable, to any Contractor, Subcontractor, Consultant, Architect Engineer or Vendor performing services for the Owner)

(a) Contractor's Comprehensive General Liability ("Claims Made Policies" may not be used)

\$1,000,000 per occurrence

\$2,000,000 general aggregate

(Limit applies to specific project Limit applies to policy)

\$1,000,000 products/completed operations aggregate

\$1,000,000 personal injury and advertising coverage

Sub Contractor Comprehensive General Liability - Any Sub Contractors utilized on the project will be (Required Not Required) to maintain the above comprehensive general liability policy limits.

(b) Contractor's Automobile Liability (Owner, Non-Owned, and Hired Car)

\$1,000,000 per occurrence

Sub Contractor Automobile Liability - Any Sub Contractors utilized on the project will be (Required Not Required) to maintain the above automobile liability policy limit.

(c) Contractor's Umbrella Policy

Unless specifically excluded for project specific reasons, the contractor shall procure and maintain during the life of this contract an Umbrella Policy as follows:

\$5,000,000 each occurrence

\$5,000,000 general aggregate

Coverage Specifically Excluded For
Project

(3) Owner's Contractor Protective Liability Policy (OCP Policy)

Required Not Required

When specifically required by the Owner (as denoted with an "X" in the above "Required" box), the Contractor shall procure and maintain during the life of this contract an Owner's Contractor Protective Liability Policy (OCP) in a minimum amount of \$1,000,000 (per occurrence) and \$2,000,000 (general aggregate). This type of policy provides the Owner with separate coverage up to the above limits as opposed to shared coverage when the Owner is only named as an additional insured on the Contractor's main policy.

Livingston Parish Library - Insurance Requirements for Projects over One Hundred Thousand Dollars and Greater

(4) Property Insurance (Builder's Risk Insurance)

Required Not Required

When specifically required by the Owner (as denoted with an "X" in the above "Required" box), the Contractor shall purchase and maintain property insurance covering the work site up to the full insurable value equal to the Contract sum and the insurance shall be endorsed to comply with any waiver of rights provisions. The property insurance shall be "All Risks Builder's Risk Completed Value Form" insurance or equivalent manuscript policy, and shall include without limitation, insurance against the perils of fire (with extended coverage) and physical loss or damage including, without duplication of coverage, theft including theft of materials whether or not attached to any structure, vandalism/malicious mischief, collapse, earthquake, windstorm, false work, testing and startup, temporary buildings and debris removal including demolition occasioned by enforcement of any law.

The property insurance shall also contain an endorsement or specific provision to cover damages, losses and expenses incurred in the repair or replacement of any insured property (including, but not limited to charges of engineers, architects, attorneys and others). The Property insurance also shall include by endorsement or special provision the following additional coverage elections: operational testing (if risk is present), off premises storage not on the site or in transit and property in transit. When required, no work may commence on the site until the Builder's Risk Insurance is obtained.

The Contractor is to provide Builder's Risk Insurance to protect the Owner, Architect, Engineer, Contractor, and any Subcontractors as to any interests that may exist. Until acceptance of work by the Owner, all work in connection with a particular contract is in the custody, charge and care of the Contractor who will take every necessary precaution against injury or damage to any part thereof whether arising from execution or from the non-execution of the work.

Contractor shall be responsible for payment of the deductible for Builder's Risk Insurance or any other property coverage deemed required to be purchased for this Contract, whether acquired by the Owner or otherwise.

(5) Errors & Omissions Policy (Professional Liability Insurance)

(Applicable Only to Professional Services Contracts including, but not limited to, Architect, Engineer, Consultant or Other Professional Contracts)

Required Not Required

This policy covers negligent acts, errors and omissions in its performance of professional services with minimum policy limits of \$1,000,000 per occurrence and \$1,000,000 general aggregate.

Livingston Parish Library - Insurance Requirements for Projects over One Hundred Thousand Dollars and Greater

Section B – Other Insurance Requirements

(1) Additional Insured Classification and Waiver of Subrogation (Always Required)

The Owner must be listed as an additional insured on all policies except for worker's compensation and professional liability insurance policies. All policies will provide a thirty day written notice of cancellation. Waiver of subrogation will be given to the Owner on all policies which means that the Contractor's insurer(s) will have no right of recovery or subrogation against the Owner.

Except for professional liability insurance, it is the intention of the parties that the insurance policy shall protect both parties and be the PRIMARY COVERAGE for any and all losses covered. Again all policies required above shall be primary to any insurance carried by the Owner. The insurance companies shall have no recourse against the Owner for payment of any premiums or for assessments under any of the above policies.

(2) Indemnification for all Contractors, Except for Architects, Engineers or Other Licensed Professionals (Always Required)

The Contractor will indemnify, defend, and hold harmless the Owner, including the Owner's employees and agents, from and against any and all claims or liabilities, arising from the fault of the Contractor, its employees, subcontractors or agents in carrying out the Contractor's duties and obligations under the terms of this agreement. The Owner will indemnify, defend, and hold harmless the Contractor, including the Contractor's employees and agents, from and against any and all claims or liabilities, arising from the fault of the Owner, its employees or agents in carrying out the Owner's duties and obligations under the terms of any agreement. This section will survive the termination of any agreement. In the event that either party takes any action to enforce this mutual indemnity provision, the prevailing party shall be entitled to recover reasonable attorney's fees and costs arising as a result thereof.

(3) Indemnification for Architects, Engineers, or Other Licensed Professionals (Always Required)

The Contractor will indemnify and hold harmless the Owner, including the Owner's employees and agents, from and against any and all claims or liabilities, arising from the fault of the Contractor, its employees, subcontractors or agents in carrying out the Contractor's duties and obligations under the terms of this agreement. The Owner will indemnify and hold harmless the Contractor, including the Contractor's employees and agents, from and against any and all claims or liabilities, arising from the fault of the Owner, its employees or agents in carrying out the Owner's duties and obligations under the terms of any agreement. This section will survive the termination of any agreement. In the event that either party takes any action to enforce this mutual indemnity provision, the prevailing party shall be entitled to recover reasonable attorney's fees and costs arising as a result thereof.

ADVERTISEMENT

The Livingston Parish Library Board of Control does hereby advertise for sealed proposals and will open same on:

1. September 30, 2019.
2. At the Administrative Offices of the Livingston Parish Library, 13986 Florida Blvd, in the Town of Livingston, Louisiana, 70754, at the hour of 3:00 P.M., Central Time Zone.
3. For an Integrated Library System for use by the Livingston Parish Library (RFP-2019-LPL-ILS).
4. Contract documents, including drawings and technical specifications, are on file at the Administrative Offices of the Livingston Parish Library, 13986 Florida Blvd, in the Town of Livingston, Louisiana, 70754. Access to electronic bidding is available through www.mylpl.info/rfp.
5. The successful proposer shall be required to furnish a Performance Bond in an amount equal to 100% of the specific calculated total amount as defined in the request for proposal.
6. The Library reserves the right to reject any and all proposals.
7. The public shall incur no obligation to the Contractor until the Contract between the Library and the Contractor is fully executed.
8. All sealed proposals must be plainly marked and should contain the following on the outside of the envelope:

PROPOSAL FOR “Integrated Library System for use by the Livingston Parish
Public Library System (RFP-2019- LPL-ILS)”

GIOVANNI J. TAIROV, DIRECTOR

RUN: Livingston Parish News – August 15, 2019