

	<p align="center"><b>University of Central Texas</b></p> <p align="center">Request for Proposals</p>	<p>Solicitation: Date Issued: Procurement Officer: Phone: E-Mail Address: Mailing Address:</p>	<p><b>5400013582</b> <b>05/05/2019</b> <b>M. Purchinson</b> <b>512-896-0284</b> <a href="mailto:purchasing@uct.edu">purchasing@uct.edu</a> <b>1616 Guadalupe St.</b> <b>UCT Bldg. Suite 3.302</b> <b>Austin, Tx 78708</b></p>
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## Request for Proposal (RFP)

for

## Library Services Platform (LSP)

**Contract Period: Three (3) Years from Date of Award**

**and**

**three (3) optional One-Year Renewals**

This document constitutes a request for *sealed hard copy proposals* (one original plus two copies) from qualified Vendors to provide a **Library Services Platform** for the University of Central Texas libraries, as specified herein, in accordance with the requirements, terms and conditions of this RFP.

Submit Your Offer On-Line at the Following URL: <https://purchasing.uctexas.edu/bidweb/bidweb.WBX>

**Submit Offer By:** 11:00:00 7/1/2019

**Number of Copies to be Submitted:** 3 (one original plus two copies)

**Deadline for Questions/Enquiries:** 17:00:00 5/29/2019

Submit questions and inquiries to:

Emma Librarian ([emmaLibrarian@uct.edu](mailto:emmaLibrarian@uct.edu))

By submitting a response to this RFP, the Vendor agrees to furnish items and/or services pursuant to all requirements and specifications contained in this RFP, upon either the receipt of an authorized purchase order from the University of Central Texas, which shall be agreed by the parties as forming a binding contract pursuant to the terms set forth herein. The Vendor further agrees that, subject to the terms of this RFP, any exceptions to the RFP, or other changes could disqualify the Vendor from consideration in University's final award.

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## **I. Introduction and General Information**

### **A. Purpose**

The University of Central Texas (UCT) Library System solicits proposals from vendors to migrate data from existing platforms and to install a new, stable next generation Library Service Platform. Successful proposals will directly address the specific needs of the University as outlined in Section III of this document. Note that the University of Central Texas maintains a wide variety of digital repositories for archival documents, faculty and student dissertations, and other miscellaneous digital materials. The ideal candidate will offer options for integrating cloud-based institutional repositories with library catalogs and collections with minimal restrictions and constraints to sharing and dissemination of said materials according to established University policies.

### **B. UCT Library Background**

The University of Central Texas Libraries advances teaching, fuels research and energizes learning through expansive collections and digital content, innovative services, programs, tools and partnerships to develop critical thinkers and global citizens that transforms lives. Our vision is one of transformation from a knowledge service provider within the university to becoming a preeminent and active partner within a rich and diverse learning and research ecosystem. We are seeking a next generation library service platform that will facilitate this transformation and help ensure that our vision becomes reality.

The UCT campus supports a vibrant and diverse community of more than 40,000 undergraduate and graduate students. Students can choose from nearly 13,000 courses in their pursuit of one or more of our 148 degree programs lead by a teaching faculty of over 3,500. The library maintains a collection of nearly 8 million volumes and provides access to an ever growing list of digital journals, databases, and web resources.

Our current resource management solution is based on the Symphony/Enterprise integrated library system from SirsiDynix and the EBSCO Discovery Service (EDS)

discovery platform. In addition, we use OCLC's EZProxy for authentication, SirsiDynix's Resolver link resolver, and EBSCO's ResourceIQ knowledge base to update electronic holdings in the OPAC.

## **II. Instructions for Submitting Proposals**

### **A. Instructions for Vendors**

All proposal must be developed and submitted in accordance with the instructions outlined in this section. Each vendor's proposals shall be prepared simply and economically, and include a straightforward, concise description of the vendor's capabilities that satisfy the requirements of the RFP. Proposals should nevertheless be sufficiently thorough and detailed to ensure the evaluators are able to properly evaluate the vendor's ability to provide the required services. All descriptions of services should include an explanation of proposed methodology, where applicable. The proposals may include additional information that the vendor considers relevant to this RFP. **Failure to provide the requested information may result in disqualification.**

Vendors are required to provide a response to all information requested in Sections IIC. Vendor Evaluation and III. System Requirements. For ease of evaluation, vendors must organize the information in their proposal in the same order and sequence as outlined below.

1. **Cover Letter.** Submissions should include a cover letter providing the company name and address, and the name, telephone number and e-mail address of the person representing the company on this matter. The letter should include a statement of willingness and ability to perform the services described herein and to enter into a contract with the University agreeing to ALL terms and conditions, as set forth by the University. The cover letter must be signed by a person having the authority to commit the vendor to a contract.

2. **Vendor Information.** Vendors must describe their firm’s history and experience, and document their success in the library industry, strategic plan for the future, and describe the number and types of staff employed.
3. **Proposal.** Vendors must thoroughly describe the solution, completely addressing all of the required items for each area. For each item:
  - a. Provide detailed information that adequately conveys the capabilities of the function and/or service to meet the requisite need.
  - b. Note that the terms “collection” and “collections” is intended to include all types of materials that comprise an academic library collection, whether published, unique, digital or print.
  - c. Where appropriate, provide examples of how and under what conditions our libraries will be able to customize features, workflows, etc. Additionally describe the knowledge and skill sets required to implement these changes.
  - d. For any feature that is not available in the current version of the proposed solution, describe where the feature is in the development cycle (e.g. planned, in beta testing, etc.) and when it is expected to be available for use in a production environment.

## **B. Proposal Evaluation**

The vendor will be evaluated on their adherence to the system requirements outlined in Section II. The University of Central Texas shall be the sole evaluators of the completeness, acceptability, and compliance of each proposal. Requirements indicated in this section must specifically be outlined by each vendor, and non-compliance with these requirements may result in immediate rejection of proposals. The elements of proposal evaluation are:

1. **Evaluation of Mandatory Requirements.** The Vendor must provide proposals of service that meet all of the mandatory requirements listed in this

RFP. Vendors not satisfying all mandatory requirements are subject to immediate disqualification.

2. **Evaluation of Desirable and Optional Features.** Desirable and optional features are those features not deemed to be essential, but that may be beneficial to the library's mission. Though some optional and desirable features have specifically been mentioned in the body of this document, the Vendor should include desirable and optional features that may assist The University of Central Texas Library System. The Vendor should explicitly state additional costs and time constraints associated with each optional feature.
3. **Vendor Interviews and Product Demonstration.** Vendors must be prepared to demonstrate all goods and services listed in proposal. Demonstration teams should consist of academic librarians and system specialists, or by individuals with equivalent experience in these areas. UCT expects that all features demonstrated are available for immediate use upon migration to the proposed system. If certain features are in beta phase, this should be clearly indicated by demonstration teams, and the availability of such beta interfaces should be clearly communicated. Current bugs and feature requests should be available for viewing or should be communicated to UCT upon request. Demonstrations may be performed live remotely using screen sharing technologies such as WebEx or Zoom, but in-person demonstrations are strongly encouraged.
4. **Pricing Evaluation.** The Vendor must provide itemized pricing on the system being proposed. Pricing for products and services must be in the form of guaranteed discount from the vendor's suggested retail prices in effect at the time purchase is made. Complete price lists of all vendor products and services (extraction, conversion, maintenance, installation, training, etc.) must be included in the bid proposal.

During the term of the contract, the vendor must provide the participating libraries with updated vendor price lists within fifteen (15) days of becoming available. Provide available cost figures for any products/services discussed in this section. The proposal must indicate compliance with this requirement.

The vendor shall provide the first year of the core library management software maintenance/subscription at no additional cost and provide a warranty period of at least one year from the point of acceptance of the implementation for each major subsystem (e.g. LMS modules, Discovery service, etc.) The vendor shall provide a guaranteed annual escalation cap for maintenance fees or use the Consumer Price Index (CPI), whichever is least, and most advantageous to the State of Texas.

All proposed discounts must be guaranteed throughout the life of the contract. Maintenance and Subscription shall be included as a part of the cost information provided.

### **C. Vendor Evaluation**

The University of Central Texas prefers established vendors with documented success in the library industry, and sufficient numbers of well-trained and responsive staff. To help determine the extent to which the Vendor meets these criteria, please provide the following information:

1. Briefly describe your firm's history and origins as relates to the library industry.
2. Describe your firm's experience in the library systems industry.
3. Describe your firm's strategic plan and address its ability to address unforeseen developments in the coming five years.
4. Provide an organization chart for your firm and résumés of key management and personnel who would be assigned to this project.
5. Provide the total number of staff employed, organized by department or division (development, sales, support, management, etc.).

- a. How many of the staff total would be dedicated to the proposed solution?
  - b. Describe the migration and implementation team you would assign, including the number of dedicated staff, their background and roles.
6. Provide a customer list organized by library type, vendor products purchased or licensed. Please include contact information for at least one person for each customer.
- a. Specifically note the customers who have purchased from you in the last year.
  - b. List all contracts for the proposed solution that were not renewed during last year.

**D. Evaluation Criteria**

Each evaluation section will produce a score for that section, and all scores will be combined, weighted according to the following criteria, and rank ordered.

<b>Cost</b>	<b>40%</b>
<b>Functionality and Performance</b>	<b>40%</b>
<b>Accessibility Compliance</b>	<b>5%</b>
<b>Experience and Reliability</b>	<b>15%</b>

**E. Timetable**

The University anticipates the progression from solicitation of bids through the evaluation, selection and implementation of the new system will proceed according to the following timetable.

<b>RFP Available to Vendors</b>	May, 2019
<b>RFP Submission Deadline</b>	<b>7/1/2019</b>
<b>Vendor Presentations</b>	7/15 to 8/1/2019
<b>Notice of Award</b>	8/21/2019
<b>Project Start Date</b>	11/1/2019
<b>Project Completion (Go Live) Date</b>	5/4/2020

### III. System Requirements

#### **A. Scope of the Request for Proposals**

Successful proposals will include costs for all software and services proposed and will address at minimum all the needs of UCT Library System as indicated in Section III. All costs listed in the proposal should remain constant from the time of proposal throughout the bid process and - if selected - throughout the duration of contract with UCT. Features and modules included in the library services platform should be current, tested, and prepared for regular use by patrons or library staff. Successful proposals at minimum will cover costs, timelines, and features of the following:

- a. Software
- b. Data conversions and migration
- c. Training
- d. Annual software licensing fees
- e. Annual technical/maintenance support charges
- f. Additional system features
- g. Miscellaneous fees/charges
- h. Total contract price

#### **B. Strategic Fit**

Explain how the proposed solution described in the RFP is a strategic match for the mission and goals of the UCT libraries. Please ensure that your answer addresses the following points:

- 1) Describe how the proposed solution meets the overall intent and goals of the UCT libraries.
- 2) Describe how the proposed solution will benefit library staff, and library users.
- 3) Describe how the proposed solution will help meet the goals of the UCT libraries.

- 4) Describe why the proposed solution is the best match for UCT libraries, specifically addressing any special/unique features.
- 5) Elaborate on the characteristics of your solution/s that define them as "next generation."
- 6) Describe how these "next generation" features could enhance workflows and sharing of expertise and enable library staff to anticipate and evolve along with current and future library technology and trends.
- 7) Describe how your solution is customizable by individual institutions to fit the needs of their patrons, differences in staff organizational structure and the specific needs of the collection.

### **C. General System Functional Requirements**

In addition to the specific requirements described below, all systems should provide the following general functional requirements:

**Reliability.** Many UCT libraries are open 24 hours a day, most are open year-round, and patrons and staff expect a very high degree of system availability and response time. The successful solution must meet these very high reliability expectations. In cases where failures do occur, the solution provider must be ready and able to mitigate and resolve them quickly and accurately.

**Scalability and performance.** As noted above, UCT library collections are comprised of a growing collection of diverse holdings. The successful solution must effectively accommodate the large and varied workload with acceptable performance and room for future growth.

**Manageability.** UCT libraries maintain highly streamlined staffing levels within a constantly changing organizational environment. Therefore, UCT libraries require an easily managed solution with low administrative overhead. The solution should also generally be designed for configuration flexibility with the ability to roll back configuration or design decisions to a previous stable configuration.

**Security.** An extremely large amount of critical data will be entrusted to the LSP. UCT libraries requires that the solution provide robust mechanisms for data backup and recovery, as well as safeguards against data tampering and theft. In addition, the solution must provide for the management of data security and privacy at the level of the institution, individual collections, working groups, individual staff and individual patron users. The LSP should also allow authorization and authentication at the same level of granularity.

**Identity management.** UCT libraries encompass a large and complex patron and staff population with most already represented in institutional identity management systems. The successful solution should allow UCT libraries to leverage those identity stores with no loss of information. The solution should also provide for shared LSP-hosted identities for institutions with no identity store of their own.

**Interoperability.** UCT libraries integrate their current ILS with other institutional platforms to support strategic workflows. Examples of such systems include registrar management, collection agency, enterprise resource management, course management, general ledger management, and identity management. The libraries also offer interlibrary loan services via platforms such as ILLiad, Ariel, Odyssey, Rapid ILL and Clio. The successful solution must allow UCT libraries to retain strategically important systems integrations.

**Flexibility and customizability.** The solution should offer flexible, powerful capabilities for large-scale data extraction, manipulation, reporting and automation. These capabilities might include native reporting tools, integration with external reporting tools, application programming interfaces (APIs), and scripting functionality.

## **D. Detailed Functional Requirements**

1. Architecture. The University of Central Texas requires that the proposed solution be a Library Services Platform. Describe the LSP's system architecture, and the capacity and complexity of as-needed updates and modular extension to services.
  - a. The proposed solution should be accessible using only a web browser. Describe the ability of each proposed solution and their modules to be used within the web browser.
  - b. The proposed solution should be compatible with all standard modern web browsers. Describe the scope of any incompatibility with any web browser.
  - c. The proposed solution should be compatible with all standard modern operating systems. Describe the scope of any incompatibility with any operating system.
  - d. Describe how the vendor will ensure continued compatibility with future versions of desktop and server operating systems, browsers, supporting software and utilities.
  - e. The proposed solution should be a multi-tenant solution. Describe vendor's server infrastructure. Describe how UCT's data is isolated from that of other tenants.
  - f. Describe how UCT and library staff will receive and be notified of updates.
2. Authentication. Proposed solution must integrate with UCT's EZproxy authentication service
3. Accessibility
  - a. Proposed solution must be compliant with accessibility standards for staff and patrons with disabilities.
  - b. Describe proposed solution's compliance with Web Content Accessibility Guidelines (WCAG) 2.1 and Americans with Disabilities Act (ADA) Section 508.
  - c. Describe how proposed solution assures conformance to accessibility standards across various web browsers and operating systems.

#### 4. Security and Privacy

- a. Proposed solution must use secure network protocols.
- b. Describe proposed solution's collection and retention of patron data.
- c. Describe proposed solution's provisions for anonymization and deletion of secure patron data.
- d. Describe data breaches that have occurred with proposed solution.
- e. Describe vendor's protocols for handling data breaches.
- f. Describe server failures that have occurred with proposed solution. Describe how vendor protects against loss of data.

#### 5. Discovery and User Experience

- a) Identify the types of content that can be found through the search interface and which sources are indexed. Can content from other external systems be indexed automatically?
- b) Describe the available options when a patron cannot find an item.
- c) Describe how patrons can filter searches by criteria such as date, subject, or format.
- d) Describe advanced search features such as Boolean operators, wildcards, and exact string matches, and how they would be used by patrons..
- e) Describe how the proposed solution facilitates both known-item and open-ended searches.
- f) Describe how the solution recommends subjects, titles, authors, spelling corrections, and other information to help patrons search.
- g) Describe how the proposed solution offers supplemental and contextual information about search results such as cover images, tables of contents, and reviews and identify the sources of this information.
- h) Describe how search results could be expanded to include items from beyond a single library, e.g. consortial or WorldCat holdings. Can the Z39.50 protocol, or other methods, be used to integrate search results from other systems?

- i) Describe how the search interface can be used to browse nearby or related items for a specific call number, name, or subject heading.
- j) Describe how the solution enables users to save, print, share, and export search results or lists of search results.
- k) Describe how the link resolver is displayed to the user and how the interface transitions between search results, the link resolver, and the desired resource. Is the process completely invisible, immediately redirecting users to a resource? Are users presented with a list of options?
- l) Describe how the system provides proactive resource recommendations based on (optional) patron search history or other forms of expressed subject interest.

## 6. Performance

- a. The proposed solution must require minimal downtime for maintenance.
- b. Describe percentage of uptime for proposed solution's existing implementations.
- c. Describe how UCT will be notified of any planned downtime.
- d. Describe vendor's protocols for unplanned downtime.
- e. Describe latencies at peak hours. Describe how proposed solution provides for efficiency in light of multi-tenant architecture.

## 7. Interlibrary Loan

- a. The proposed solution must interact with many interlibrary loan platforms.
- b. Describe how the proposed solution permits other libraries to view UCT's collection.

## 8. Cataloging and Circulation

- a. Describe how proposed solution supports importation of MARC records, individually and in batches.
- b. Describe how proposed solution supports validating bibliographic records with reference to cataloging rules or controlled vocabularies.

- c. Describe vendor's previous experiences migrating catalog data from Innovative Interfaces Sierra.
- d. Describe support for multilingual cataloging, including diacritics, non-Roman alphabets, and bidirectional display.
- e. Describe how proposed solution supports checkin and checkout and interacts with UCT's existing workflows.
- f. Describe proposed solution's support for serials management.

## 9. Analytics

- a. Describe how proposed solution complies with COUNTER and SUSHI standards.
- b. Describe proposed solution's support for automatic generation of reports
- c. Describe the level of programming knowledge required for staff to manually generate reports.
- d. Describe proposed solution's support for exporting report data in standard formats such as csv.
- e. Describe proposed solution's retention of circulation data.

## 10. Support

- m) Describe the levels of support.
- n) Provide all costs of support for each level.
- o) Indicate whether support includes an institutional service representative.
- p) Indicate the hours during which the representative is available for support, if included.
- q) Indicate what services support is able to render at no-cost.
- r) Indicate which services are paid, and the pay plan and pay schedule for each.

## 11. Billing

- a. The proposed solution must integrate with UCT financial office's system.
- b. Describe how proposed solution automatically and manually generates fees.

- c. Describe the procedure for waiving or limiting fees.
- d. Describe how proposed solution accepts payment of fees.

#### **IV. Pricing, payment and Invoices**

##### **1. Pricing Requirements/Cost Evaluation.**

- a. The Vendor shall provide firm, fixed pricing information to provide a Library Services Platform (LSP) as requested herein in accordance with the terms, conditions, and provisions of this Request for Proposal.
- b. The Vendor shall provide an itemization of cost of services which includes a NOT TO EXCEED amount.
- c. Pricing provided shall cover all products and services included in the initial purchase and all additional costs of any maintenance, technical support, upgrades, or other expenses incurred in each subsequent contract year and each year of optional renewal.
- d. Pricing provided will explicitly state all discounts received and to which products and services said discounts apply.
- e. Itemized pricing of products and services potentially included in the initial purchase should minimally include the LSP, Discovery platform, Inter-Library Loan, Electronic Resource Management line items for software, and line items for set-up, migration, customization and training services provided.

##### **2. Invoicing**

Payment for all equipment, supplies, and/or services required herein will be made in arrears. Invoices must be directed to the University's Purchasing Department and must include the contract number or purchase order number, item number, contract description of supplies or services, sizes, quantities, unit prices, and extended totals.

## V. Standard Terms and Conditions

### **a. Contracts**

- i. **Original Contract Period.** Subject to the University's right to terminate the contract, the original contract period will be from the date of contract award for three (3) years, as stated on page one of this Request for Proposal. The contract shall not bind, nor purport to bind, the University for any contractual commitment in excess of the original contract period.
- ii. **Contract Renewals.** The University may exercise three (3) optional one-year renewals to the contract.
- iii. **Contract Price.** All prices shall be as stated in the contract. The University shall neither pay nor be liable for any costs, which are not specifically identified in the contract. Increases in contract prices for any subsequent period during which the contract is effective shall be limited to the maximum amount stated in the contract for that period.
- iv. **Contract Documents.** The contract between the University and the contractor shall consist of the Request for Proposal and any amendments thereto, and the contractor's response to the Request for Proposal (insofar as the contractor's response to the Request for Proposal does not alter the Request for Proposal in any way). The University reserves the right to clarify any contractual relationship in writing with the concurrence of the Contractor, and such written clarification shall govern in case of a conflict with the applicable requirements stated in the Request for Proposal or the contractor's response. In all other matters not affected by the written clarification, if any, the Request for Proposal shall govern.
- v. **Contract Amendments.** No modification of any provision in the contract shall be made or construed to have been made unless such modification is mutually agreed to in writing by the contractor and the University's Procurement Office, and incorporated in a written amendment to the contract approved by the

University's Office of Procurement Services prior to the effective date of such modification.

- b. **Conflict of Interest.** The contractor hereby covenants that at the time of the submission of the proposal the contractor has no other contractual relationships which would create any actual or perceived conflict of interest. The contractor further agrees that during the term of the contract neither the contractor nor any of its employees shall acquire any other contractual relationships which could create such a conflict.
- c. **Termination.**
  - i. **Termination for Convenience.** The University reserves the right to terminate the contract at any time, for any reason, without penalty or recourse, by giving the contractor written notice of such termination at least 30 calendar days prior to the effective date of termination.
  - ii. **Termination for Breach.** In the event of material breach of contractual obligations by the contractor, the University may cancel the contract. If the contractor fails to cure the breach within an acceptable time frame, or if circumstances demand immediate action, the University will issue a notice of cancellation terminating the contract immediately. If the University cancels the contract for breach, the University reserves the right to obtain such equipment, supplies, and/or services from other sources and charge the contractor for any additional costs incurred as a result thereof, including attorney fees and court costs.
  - iii. **Lack of Appropriated Funding.** The contractor understands and agrees that funds required to fund the contract must be appropriated by the General Assembly of the State of Texas for each fiscal year included within the contract period. The contract shall not be binding upon the University for any period in which funds have not been appropriated, and the University shall not be liable for any costs associated with termination caused by lack of appropriations.
- d. **Insurance.** Vendor shall, at all times during the term and any renewals, maintain and provide upon request a Certificate of Insurance naming the University and its Board of

Trustees as additional insured for all required bonds and insurance. Certificates may not be modified or canceled until at least 30 days' notice has been provided to the University. Vendor shall provide at a minimum: (a) General Commercial Liability-occurrence form in amount of \$1,000,000 per occurrence (Combined Single Limit Bodily Injury and Property Damage) and \$2,000,000 Annual Aggregate; (b) Auto Liability, including Hired Auto and Non-owned Auto, in amount of \$1,000,000 per occurrence (Combined Single Limit Bodily Injury and Property Damage); and (c) Worker's Compensation Insurance in amount required by law. Insurance shall not limit Vendor's obligation to indemnify, defend, or settle any claims.

**e. Warranty.**

- i. The Vendor expressly warrants that all goods and services, and any related equipment, supplies, and/or services, provided will: (1) conform to each and every specification, drawing, sample or other description provided as part of the RFP, (2) be fit and sufficient for the purpose expressed in the RFP, (3) be merchantable, (4) be of good materials and workmanship, and (5) be free from defect.
- ii. Such warranty shall survive delivery and shall not be deemed waived either by reason of the University's acceptance of, or payment for, said equipment, supplies, and/or services.

**f. Delivery and Inspection**

- i. Delivery of the Library Services Platform (and any related equipment, supplies and/or services) must be made no later than the time stated in the contract, or within a reasonable period of time following execution of this Agreement if a specific time is not stated.
- ii. No equipment, supplies, and/or services received pursuant to the contract shall be deemed accepted until the University has had reasonable opportunity to inspect the same.
- iii. All equipment, supplies, and/or services which do not comply with the RFP specifications and/or requirements or which are otherwise unacceptable or

defective may be rejected. In addition, all equipment, supplies, and/or services which are discovered to be defective or which do not conform to any warranty of the contractor upon inspection (or at any later time if the defects contained were not reasonably ascertainable upon the initial inspection) may be rejected.

- iv. The University reserves the right to return any such rejected shipment at the contractor's expense for full credit or replacement and to specify a reasonable date by which replacements must be received.
- v. The University's right to reject any unacceptable equipment, supplies, and/or services shall not exclude any other legal, equitable or contractual remedies the University may have.

**g. Statement of Non-Discrimination.**

- i. In connection with the furnishing of equipment, supplies, and/or services under the contract, the Vendor and all subcontractors shall agree not to discriminate against recipients of services or employees or applicants for employment on the basis of race, color, national origin (including ancestry, or any other subcategory of national origin recognized by applicable law), religion, sex (including marital status, family status, pregnancy, sexual orientation, gender identity, gender expression, or any other subcategory of sex recognized by applicable law), age, disability, veteran status, genetic information, or any other basis protected by applicable law.
- ii. Vietnam Era Veterans' Readjustment Assistance Act of 1974 (VEVRAA) for Contracts of \$100,000.00 or More. This contractor and any subcontractor shall abide by the requirements of 41 CFR 60-300.5(a). This regulation prohibits Discrimination against qualified protected veterans, and requires affirmative action by covered prime contractors and Subcontractors to employ and advance in employment qualified protected veterans.
- iii. Disability Rehabilitation Act of 1973 Section 503 for Contracts in Excess of \$10,000.00. This contractor and any approved subcontractor shall abide by the requirements of 41 CFR 60-741.5(a). This regulation prohibits discrimination

against qualified individuals on the basis of disability, and requires affirmative action by covered prime contractors and subcontractors to employ and advance in employment qualified individuals with disabilities.

### Appendix I. Glossary

**Amendment** means a document issued to supplement the original solicitation document.

**Business** *see Firm.*

**Change Order** means any written alteration in specifications, delivery point, rate of delivery, period of performance, price, quantity, or other provisions of any contract accomplished by mutual agreement of the parties to the contract.

**Collection** or **Collections** is intended to include all types of materials that comprise an academic library collection, whether published, unique, digital or print.

**Contract** See clause entitled Contract in Section V. Standard Terms and Conditions.

**Contract Modification** means a written order signed by the procurement officer, directing the contractor to make changes which the clause of the contract titled "Changes," if included herein, authorizes the Procurement Officer to order without the consent of the contractor.

**Contractor** means the Offeror receiving an award as a result of this solicitation.

**Cover Page** refers to either the top page of the original solicitation on which the solicitation is identified by number, or the top page of the submitted proposal.

**Firm** means any corporation, partnership, individual, sole proprietorship, joint stock company, joint venture, or any other legal entity.

**Offer** means the bid or proposal submitted in response this solicitation. The terms Bid and Proposal are used interchangeably with the term Offer.

**OPAC** means Online Public Access Catalog

**Payee Information Form (PIF)** a form to be completed by the vendor to create a unique vendor ID (VID) within the State of Texas. Vendor must complete and submit the PIF before payment can be made.

**Procurement Officer** means the person, or his successor, identified as such on either the Cover Page, an amendment, or an award notice.

**Proposal** means the response to this request, prepared by the vendor, describing the features and functions of the proposed solution

**Solicitation** means this document, including all its parts, attachments, and any Amendments.

**Solution** means the software and services described in the submitted proposal

**Subcontractor** means any person you contract with to perform or provide any part of the work.

**University** means the University of Central Texas

**Us or We** means the University of Central Texas libraries and staff.

**Vendor** means the single legal entity submitting the offer. The term Bidder is used interchangeably with the term Vendor. See bidding provisions entitled Signing Your Offer and Bid/Proposal As Offer To Contract.

**You and Your** means the Vendor.

## **Appendix II. Sources Used in Preparation**

*The Complete Guide to RFPs for Libraries*, edited by Frances C. Wilkinson, and Sever Bordeianu, ABC-CLIO, LLC, 2018. ProQuest Ebook Central,  
<http://ebookcentral.proquest.com/lib/utxa/detail.action?docID=5452187>.

“Library Service Platforms: A Maturing Genre of Products.” (2015). *Library Technology Reports*, **51**(4).

**Missouri State University** RFP for an LSP available at  
[https://www.missouristate.edu/assets/Procurement/RFP\\_7813-14\\_Integrated\\_Library\\_System\\_or\\_Library\\_Services\\_Platform.pdf](https://www.missouristate.edu/assets/Procurement/RFP_7813-14_Integrated_Library_System_or_Library_Services_Platform.pdf)

**Monroe County Community College** RFP for an ILS  
<https://www.monroeccc.edu/rfp/RFP-IntegratedLibrarySystemMCCC.pdf>)

**South Carolina PASCAL\*** RFP for a shared LSP  
<http://webprod.cio.sc.gov/SCSolicitationWeb/contractSearch.do?solicitnumber=5400013582>

\*Partnership Among South Carolina Academic Libraries

**University of Illinois, Urbana-Champaign** RFP for an LSP available at  
<http://www.bidnet.com/bneattachments?/482188206.pdf>

**University of Ottawa** FP for an LSP available at  
[https://ocul.on.ca/sites/default/files/2017052-RFP\\_for\\_LSP\\_28-Nov-2017\\_Final\\_0.pdf](https://ocul.on.ca/sites/default/files/2017052-RFP_for_LSP_28-Nov-2017_Final_0.pdf)