Bellingham Public Library and Whatcom County Library System
Next-Generation Integrated Library System

City of Bellingham
2B-2015

RFP INFORMATION

Purchasing Telephone:	**360-778-7750**
Issue Date:	**January 26, 2015**
Contact Person:	**Madeline Sheplor**
Contact Email:	**bids@cob.org**

CLOSING INFORMATION

Date:	**February 27, 2015**
Time:	**11:00 AM**
Location:	**Purchasing Office**
Mailing Address:	**2221 Pacific Street, Bellingham, WA 98229**

Bellingham Public Library and Whatcom County Library System
Next-Generation Integrated Library System

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1.   REQUEST FOR PROPOSAL (RFP) PROCESS

Inquiries.
All inquiries related to this Request for Proposal are to be directed, in writing, to the following. Information obtained from any other source is not official and should not be relied upon. Inquiries and responses will be recorded and will be distributed to all vendors by an addendum.

Questions about the specification should be in writing only to bids@cob.org.

> Purchasing Office
> 2221 Pacific Street
> Bellingham, WA 98229
>
> Email: bids@cob.org

Closing Date.
Ten complete printed copies of each proposal, and a .pdf version either on a USB drive or optical disc, must be received by 11:00 a.m., Pacific Time, on February 27, 2015.

> Purchasing Office
> 2221 Pacific Street
> Bellingham, WA 98229
>
> Telephone   360-778-7750

Proposals must not be sent by facsimile. Proposals and their envelopes should be clearly marked with the name and address of the Vendor and the Request for Proposal number and name. **DO NOT ADDRESS YOUR PROPOSAL TO AN INDIVIDUAL.**

The RFP shall be submitted double-sided, on recycled paper, stapled in the upper left hand corner. Do not use plastic covers or bindings of any kind. Proposals shall be in black and white.

Late Proposals.
Late proposals will not be accepted. The City of Bellingham, Bellingham Public Library, and Whatcom County Library System accept no liability for misdirected or lost documents.

Evaluation Committee.
Evaluation of proposals will be by a committee of staff from the Bellingham Public Library (BPL) and Whatcom County Library System (WCLS) (hereafter referred to as the Consortium).

The evaluation committee will check proposals against the mandatory criteria. Proposals not meeting all mandatory criteria will be rejected without further consideration. Proposals that do meet all the mandatory criteria will then be assessed and scored. Vendors for the two proposals with the highest scores will be invited to give an on-site demonstration. The Consortium's intent is to enter into a contract with the vendor who has the highest overall ranking, using the weighting system noted in the Evaluation Criteria section.

Negotiation Delay.
If a written contract cannot be negotiated within thirty days of notification of the successful vendor, the Consortium may, at its sole discretion at any time thereafter, terminate negotiations with that vendor and either negotiate a contract with the next qualified vendor or choose to terminate the Request for Proposal process and not enter into a contract with any of the vendors.

2. **ESTIMATED TIME FRAMES**

The following timetable outlines the anticipated schedule for the Request for Proposal and contract process. The timing and the sequence of events resulting from this Request for Proposal may vary and shall ultimately be determined by the Consortium.

EVENT	ANTICIPATED DATE
Request for proposal issued	January 26, 2015
Last day for written questions	February 13, 2015
Request for proposal closes	February 27, 2015
Finalists On-Site Demos	4th week of March, 2015
Proposal evaluation completed	April 17, 2015
Negotiation of contract commences	May 4, 2015
Contract is signed	May 29, 2015
Acceptance	Within 6 months after signing contract

3. **PROPOSAL PREPARATION**

Signed Proposals.
The vendor must ensure its proposal includes a letter, or statement(s), substantially similar in content to the sample proposal cover letter provided in **Appendix A: Proposal Covering Letter**, signed by a person authorized to sign on behalf of the vendor, binding the vendor to statements made in response to this Request for Proposal.

Irrevocability of Proposals.
By submission of a clear and detailed written notice, the vendor may amend or withdraw its proposal prior to the closing date and time. Upon closing time, all proposals become irrevocable. By submission of a proposal, the vendor agrees that should its proposal be successful, the vendor will enter into a contract with the Consortium.

Vendors' Expenses.
Vendors are solely responsible for their own expenses in preparing a proposal and for subsequent negotiations with the Consortium, if any. If the Consortium elects to reject all proposals, the Consortium will not be liable to any vendor for any claims, whether for costs or damages incurred by the vendor in preparing the proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

Proposal Validity.
Proposals will be open for acceptance for at least 90 days after the closing date.

Firm Pricing.
Prices will be firm for the entire contract period unless this Request for Proposal specifically states otherwise.

Currency and Taxes.
Prices quoted are to be:
a) In U.S. dollars;
b) Inclusive of duty, where applicable;
c) F.O.B. destination, delivery charges included where applicable;
d) Including all taxes.

Completeness of Proposal.
By submission of a proposal the vendor warrants that if this Request for Proposal is to design, create, or provide a system, or manage a program, all components required to run the system or manage the program have been identified in the proposal, or will be provided by the contractor at no charge.

4.   **ADDITIONAL TERMS**

Where applicable, the names of approved sub-contractors listed in the proposal will be included in the Contract. No additional subcontractors will be added, or other changes made, to this list in the Contract without the written consent of the Consortium.

Acceptance of Proposals.
This Request for Proposal should not be construed as an agreement to purchase goods or services. The Consortium is not bound to enter into a contract with the vendor who submits the lowest priced proposal or with any vendor. Proposals will be assessed in light of the evaluation criteria. The Consortium will be under no obligation to receive further information, whether written or oral, from any vendor.

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

Definition of Contract.
Notice in writing to a vendor that it has been identified as the successful vendor and the subsequent full execution of a written contract and purchase order will constitute a contract for the goods or services, and no vendor will acquire any legal or equitable rights or privileges relative to the goods or services until the occurrence of both such events.

Liability for Errors.

While the Consortium has used considerable efforts to ensure an accurate representation of information in this Request for Proposal, the information contained in this Request for Proposal is supplied solely as a guideline for vendors. The information is not guaranteed or warranted to be comprehensive or exhaustive. Nothing in this Request for Proposal is intended to relieve vendors from forming their own opinions and conclusions with respect to the matters addressed in this Request for Proposal.

Modification of Terms.

The Consortium reserves the right to modify the terms of this Request for Proposal at any time at its sole discretion. This includes the right to cancel this Request for Proposal at any time prior to entering into a contract with the successful vendor.

Ownership of Proposals and Public Disclosure.

All documents, including proposals, submitted to the Consortium become the property of the Consortium. They will be received and are subject to the provisions of the Washington State Public Records Act.

Project and Services Payments.

Payment Schedule for software licenses will be tied to the Consortium's installation, training, acceptance of, and use in production of the software for each project objective. Payment milestones for software will be as follows: 40% upon completion of software installation and technical training, 30% upon completion of end user training, 20% upon acceptance, and 10% upon use in production.

Acceptance indicates the Consortium has completed configuration evaluation and can verify software will perform functions as described in proposal response and other documents. Use of a system in production indicates the Consortium is using the software to support day-to-day operations associated with the project objective.

Payment for services and expenses will be made following delivery of services and billing for approved expenses. Software maintenance obligations will not commence until system is operating in production.

Proposal Checklist.

This checklist has been provided solely for the convenience of the vendor. Its use is not mandatory and it does not have to be returned with the proposal.

☐ Everyone involved in putting together the proposal has read and understood the requirements.	☐ The vendor's name and the Request for Proposal number appear on the proposal envelope.
☐ The proposal meets all the mandatory requirements.	☐ The appropriate number of copies of the proposal have been made.
☐ The proposal addresses everything asked for, particularly those things identified in **Appendix B: Vendor Response**	☐ The proposal will definitely be at the closing location before the closing time.
☐ The proposal clearly identifies the vendor, the project, and the Request for Proposal number.	☐ The proposal is being delivered by hand, courier, or mail – not fax.
	☐ The covering letter has been signed and attached.

5.   PROJECT OVERVIEW

The Consortium is soliciting competitive proposals from qualified firms to achieve several goals:

1. Migrate the Consortium's ILS data from a local server to a cloud-based software-as-a-service (SaaS) system.

2. Provide and support a next-generation Integrated Library Management System (ILS), designed to take into account the basic interrelationships of bibliographic and other data and processing functions found in library systems for acquisitions, cataloging, serials controls, circulation/inventory control, and interoperability with third-party vendors to perform a large variety of library functions.

3. Provide an online public access catalog (OPAC) (a.k.a discovery layer) for the Consortium's collections, and provide access to other bibliographic and multimedia electronic databases and information resources located at the Consortium and elsewhere.

This system will extend or replace the Consortium's current SirsiDynix Horizon 7.5.1 ILS and Horizon Information Portal 3.21.2 (HIP) OPAC which the Consortium jointly owns and manages. The system will either replace or integrate with the BiblioCommons BiblioCore discovery layer, currently used by both members of the Consortium. The system will also integrate closely with third-party subscription databases such as, but not limited to, OverDrive for eBooks and eAudiobooks (via the Washington Anytime Library), Zinio for eMagazines, Hoopla for streaming and downloadable media, and Boopsie's mobile app.

The Consortium seeks an ILS that supports the continued growth of the system, provides 24/7/365 availability to our patrons and staff, supports currently implemented payment systems, integrates with our current and future third-party products (see section 11), allows for differentiation in operations between the members of the Consortium, and provides an enterprise-level SQL-compliant database.

Mandatory Criteria.
The ILS needs to provide these required functions, as further noted in Appendix B: Vendor Response:

- Acquisitions
- Cataloging
- Circulation
- Serials
- Holds/Requests Management
- Patron Notifications by Mail, Email, and Phone
- Inventory
- Homebound Patron Services
- Web-Based Discovery Platform (& optimized for mobile)
- Portable/Mobile Circulation System
- Cash handling, including interoperability with the City of Bellingham's system

- Reporting/Analytics
- SaaS hosting
- Browser-based staff interface

Should we choose not to use the Web-based Discovery Platform (OPAC), the system needs:
- Ability to interoperate with BiblioCommons as front-end

These additional functions are optional but preferred:
- OPAC offers ability to serve as library website (CMS)
- Children's OPAC
- Integrated Self-Check
- Room Reservations/Events Calendar
- Kit Reservation and Circulation
- Integrated print management and PC reservation

The vendor must demonstrate prior successful installations for other consortial library systems similar to that of BPL and WCLS. The vendor is to provide information for previously benchmarked and operational systems from three U.S. public library reference sites that are broadly similar to these characteristics:

- Over 5 million annual circulations
- Over 1,000 concurrent users, both in-library and remote
- A database of at least 325,000 MARC records
- A database of at least 200,000 patron records

See Section 13**.** REFERENCES for further detail on supplying references.

6. BACKGROUND

The Bellingham Public Library (BPL) [www.bellinghampubliclibrary.org] is a department of the City of Bellingham, and Whatcom County Rural Library District, doing business as Whatcom County Library System (WCLS) [www.wcls.org], is an independent rural library district. The two systems have had a reciprocal borrowing agreement since 1944. Hereinafter they will be referred to as "the Consortium".

The Consortium is located in Whatcom County, Washington, which has seen a 15% increase in population since 2004. The Consortium itself has seen a 45% increase in annual circulation during that time, growing from 2.4 million to 3.5 million in 2013.

The Consortium has a total service area population exceeding 205,000, and provides library services to over 90,000 registered library card holders. It consists of 13 public service libraries, 4 "Connections" at academic institutions within Whatcom County, one administrative center with closed stacks, and one bookmobile. In 2014 one new branch opened, and another branch moved to a new, larger building. Additional libraries are planned for construction in future years which will increase circulation and the use of the OPAC. There is also potential for expanding the Consortium.

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Consortium Information.

	Current	Projected 5 Years
Service Population	205,000	225,000*
Active Borrowers	91,300	100,200
Total Branches & other Service Points	19	25

* Washington Office of Financial Management county population projections for 2020.
http://www.ofm.wa.gov/POP/gma/projections12/GMA_2012_county_pop_projections.pdf

The Consortium has more than 580,000 items in its collections with an annual circulation of 3.5 million items and annual requests of 770,000 in 2013. The current OPAC is accessed 24/7/365 by library patrons.

BPL adopted Dynix in 1985, and WCLS joined in 1991 to make it a shared ILS. The Consortium has used the Horizon ILS since September 2004. In 2010, WCLS added BiblioCommons' BiblioCore discovery layer [www.wcls.bibliocommons.com], and BPL followed suit in 2012 [www.bellingham.bibliocommons.com]. In addition to sharing physical collections, a patron/item database, and subscription databases, both libraries belong to the Washington Anytime Library for access to OverDrive downloadable eBooks and eAudiobooks, and jointly subscribe to the Zinio eMagazine service.

Current Technical Environment.
The Horizon database runs on Windows Server 2008 R2 in a virtual machine that is running on a system with 4 Xeon E5520 processors running at 2.27 Ghz. This database contains both bibliographic and patron records and provides the circulation, serials, acquisitions, cataloging, and home service functionality. Horizon's OPAC, called HIP, runs on a Windows 2008 SP2 server running in a VMWare 4.0 server instance which runs on a Windows Server 2008 SP2 OS.

BiblioCore is vendor-run by BiblioCommons as a Software-as-a-Service system using Amazon Web Services. It communicates with the ILS via a "lightweight connector".

Several systems interact with the ILS to provide services to patrons:
- The Consortium currently uses 30+ separate SIP2 (Standard Interchange Protocol) services to interface with:
  - 21 "CircIT" and 12 "ACS" self-checkout stations from Tech Logic – approximately 60% of all checkouts are done via these stations.

  - CLASS from Active Networks – an integrated payment processing system used by the City of Bellingham and BPL that allows patrons to pay fines (either all fines or line item fines) and send the payment information back to the ILS.

  - i-tiva from TALKINGtech – telephone notification system calls patrons with notifications and allows patrons to call in to renew items and review their holds and other account information.

  - CASSIE from Librarica – for patron authentication, and time and print management, on over 100 public Internet computers.

  - OverDrive from OverDrive – for eBooks and eAudiobooks via the Washington Digital

Library Consortium's 'Washington Anytime Library'.

- o hoopla from Midwest Tape – for downloading and streaming music, video, and audiobooks.

- o KitKeeper from Plymouth Rocket – used by Book Clubs at BPL to reserve and circulate groups of items.

- o Freegal from Library Ideas – a music download service used by WCLS.

- o BiblioFines from BiblioCommons – online fine payments via PayPal, used by WCLS.

- Some services communicate with Horizon through HIP, including:
  - o EZProxy from OCLC – used to manage patron authentication for several remote databases (see **Appendix D: Current List of Online Database Subscriptions** for a full list of databases).

  - o Library Elf from Jandi Enterprises – a service that allows families to enter all their library cards and consolidate email notifications.

  - o Zinio from Recorded Books – for patrons to read and download eMagazines.

  - o LibraryNow by Boopsie – a multi-platform mobile app. that consolidates access to several services. Subscription is through a consortium managed by the Washington State Library.

- Some services integrate with BiblioCore:
  - o NoveList Select from EBSCO – enhances the OPAC with recommended reads, and series and awards information.

  - o Syndetic Solutions from ProQuest – enhances the OPAC with cover images, book reviews, author notes, and summaries.

- Some services integrate only with library websites:
  - o Room Reserve and Events from Evanced Solutions – patrons can book meeting rooms and "checkout" passes to local museums. Staff use these tools to book events that display on the libraries' events calendars.

- Some services are used but not integrated:
  - o WorldShare InterLibrary Loan from OCLC – for ILL loan and request management.

  - o OCLC FirstSearch – used by staff to request materials outside our area for resource sharing, branded WayFinder.

  - o Question-Point from OCLC – a chat reference service, branded 'Ask-WA', via the Washington State Library.

- Some services require URL links to individual catalog records:
  - o BookLetters from BookSite – used by WCLS for managing email newsletters

- o   Constant Contact – used by BPL for managing email newsletters

- o   Websites by both members of the consortium

- One service requires custom SQL scripts for on-going Bib., Item, Requests, and Circulation data extraction:
  - o   CollectionHQ from Baker & Taylor – used by WCLS for collection analysis

7.   SCOPE OF WORK

The proposed ILS will enhance or replace the Horizon ILS, with all of its corresponding modules, as well as either integrating with the Consortium's third-party products or providing services native to the ILS that are comparable to these third-party solutions. A browser-based staff interface is to be used for ~200 staff workstations at 15 locations (including one bookmobile), as well as remotely for authenticated users. The browser-based OPAC will be available from anywhere, 24/7/365, on desktop and mobile computing devices.

The system will either replace or integrate with the BiblioCommons discovery layer. If it replaces BiblioCommons, the Consortium prefers that it also replace either or both of the Consortium's websites.

A. Project Management and Timeline.

The vendor is responsible for providing management of their own resources in order to meet the project goals and time schedule. The Consortium will be responsible for providing project management of its resources and will ensure the availability of sufficient staff and resources to meet the goals and time schedule agreed to after award of contract.

The vendor will work closely with the Consortium's project managers to jointly develop and maintain a detailed overall project plan and timeline.

B. Implementation.

After award of the contract, the vendor will develop a Project Work Plan for implementing the system and migrating the Consortium's current system data. At a minimum, the following areas will be addressed:

- Identify the vendor's project team, their expertise, and their responsibilities.

- Provide a "best case" implementation schedule based on a negotiated start date following award of the contract.

- Document all requirements, Consortium responsibilities, and specifications for migration and implementation.

- Identify process of training system users and the training materials and resources available to the Consortium.

C. Data Conversion.

If proposing a migration from Horizon to another system, identify any areas where migrated data will need to be modified, truncated, reformulated, or lost as it moves into the vendor's system. Also note if patron- and staff-generated data can be imported from BiblioCommons. Discuss migration issues that have been encountered moving data into the vendor's system from Horizon, and what the solutions are.

The Project Work Plan will specify data scrubbing and data conversion deadlines.

D. Training.

The successful vendor must provide initial training for two System Administrators and two back-ups (one of each from each member of the Consortium) to ensure they are sufficiently familiar with all setup procedures and administrative functions. The vendor shall also provide in-person training in Bellingham to insure that up to 15 Consortium staff responsible for training the remainder of the staff are sufficiently familiar in the use of all software. The initial training costs shall be all-inclusive including daily training rates, travel, hotel and per diem, etc. The vendor shall provide an initial training plan to ensure that this requirement is satisfied. Training documentation and related materials will be provided to the Consortium for reference, as well as to enable the Consortium to conduct future staff training. Such training documentation and related materials can be photocopied or reproduced by the Consortium for its own internal use.

E. Testing.

The vendor will provide the following:

- A testing environment for all modules of the ILS and OPAC.

- Guidance and assistance in developing a test plan that will assure that all the requirements are met and fully operational at go-live plateau.

- Guidance and assistance in developing test strategies, plans, and test plan to ensure that each module is ready for production and full operation at go-live plateau.

F. Configuration.

The proposed system must be configured to accommodate the following database sizes and transaction loads:

	Initial Size	Year 5 Growth
Bibliographic Records	287,000 titles	325,000 titles
Items (copies, volumes)	585,000 items	675,000 items
New Items (annual)	70,000	80,000

Authority Records	815,000 records	1 million records
Patron Records	145,000 records	175,000 records
Annual Circulation	3.6 million checkouts	5 million checkouts
Annual Requests	770,000	850,000
Serial subscriptions	1,450 subscriptions	1,300 subscriptions
Total number of simultaneous staff users	200 users	225 users
Total number of simultaneous OPAC users	500 users	1,000 users

G. Data Storage, Backup, and Secondary Storage

The Consortium is primarily interested in moving from self-hosted servers in a local colocation facility, to a Software-as-a-Service system managed by the vendor. The cloud services should be run on servers hosted in Tier IV datacenters. The vendor should have a robust backup and recovery program in place, including both full and incremental backups, with geographic redundancy and a recovery testing schedule that local administrators can monitor for adherence.

8.   TWO-DAY ON-SITE DEMONSTRATIONS

Finalists should be prepared to demonstrate the features and functions of their system to the Joint ILS Selection Committee and other Consortium staff on-site at one of the Consortium's administrative headquarters in Bellingham, WA (specific location to-be-determined). We anticipate a two-day demonstration focusing on Circulation and OPAC functions on one day and Technical Services functions on the other day. Vendor's costs for the demonstration shall be the responsibility of the vendor. On-Site Demonstration scripting will be provided for finalists.

9.   CONTRACT & PROPOSAL INFORMATION

Selected Contract Clauses

Compliance with Laws
The contractor will give all the notices and obtain all the licenses and permits required to perform the work. The contractor will comply with all laws applicable to the work or performance of the contract. The City of Bellingham and WCLS are exempt from Federal Excise Tax. The successful bidder will be required to obtain a Bellingham City Business Registration Certificate and pay business and occupation taxes. For additional information, check with the City of Bellingham's Finance Department, 360-778-8025. Any contract resulting from this Request for Proposal will be governed by and will be construed and interpreted in accordance with the laws of the State of Washington.

Indemnity

Any contract resulting from this Request for Proposal will require that the contractor indemnify and save harmless the Consortium, the City of Bellingham, their employees, and their agents from and against all claims, demands, losses, damages, costs and expenses made against or incurred, suffered or sustained by the Consortium or the City at any time or times (either before or after the expiration or sooner termination of this contract) where the same or any of them are based upon or arise out of or from anything done or omitted to be done by the contractor or by any servant, employee, officer, director or sub-contractor of the contractor pursuant to the contract excepting always liability arising out of the independent acts of the Consortium or the City.

LIABILITY AND INSURANCE: The Contractor will be required to defend the Consortium, hold it harmless, and indemnify it as to all claims, suits, costs, fees and liability arising out of the acts or work of the Contractor, its employees, subcontractors, or agents (including field work) pursuant to any Agreement, resulting from this RFP where such liability is incurred as a result of the actions or omissions of such parties. The Contractor will be required to obtain and maintain in force at least the following minimum insurance coverages covering all activity that would result from this RFP and as to name the Consortium members as additional insured:

COVERAGE TYPE	AMOUNT
Workers Compensation	Statutory Amount
Broad form Comprehensive General Liability	$1,000,000 per occurrence $2,000,000 aggregate
Professional Liability	$1,000,000 aggregate
Automobile Liability	$1,000,000

The Contractor will be required to specifically and expressly waive any immunity that may be granted it under the Washington State Industrial Insurance Act, Title 51 RCW. Further, the indemnification obligation under a contract resulting from this RFP shall not be limited in any way by any limitation on benefits payable to or for any third-party under the workers' compensation acts. The Contractor will be required to submit an insurance certificate showing the coverage required listed above to the Consortium for approval at least annually.

Funding

Should either party here believe that the other has failed to substantially perform all or a material part of its obligations under the contract, it shall deliver written notice to that effect to the other, specifying the alleged default and giving the other party fifteen (15) days to cure such default. Thereafter, should the default not be remedied to the satisfaction of the non-defaulting party, the contract may be terminated upon seven (7) days written notice (delivered by certified mail). In the event of termination under this subparagraph, the contractor shall be paid an amount, in the discretion of the Consortium's project manager, which takes into account actual costs incurred by the contractor in performing the project work to the date of termination, the amount of work originally required which was satisfactorily completed to the date of termination, the cost to the Consortium of completing the work itself, or of employing another firm to complete it, and the inconvenience and time which may be required to do so, along with any other factors which affect the value to the Consortium of the project work which has been

performed to the date of termination. In no event shall the contractor receive an amount based on anticipated profit on unperformed services or work.

On the giving of notice of termination by either party, contractor shall immediately begin winding down its services in anticipation of the termination, and shall be prepared to deliver to the Consortium all documents and other uncompleted work on the date of termination.

In the event funding is withdrawn, reduced, or limited in any way after the effective date of the contract due to Consortium budgetary constraints, and prior to its normal completion, the Consortium may summarily terminate the contract as to the funds withdrawn, reduced, or limited notwithstanding any other termination provisions of the contract. If the level of funding withdrawn, reduced, or limited is so great that the Consortium deems that the continuation of the services covered by the contract is no longer in the best interest of the Consortium, the Consortium may summarily terminate the contract in whole notwithstanding any other termination provision of the contract. Termination shall be effective upon receipt of written notice.

Software

It is the contractor's responsibility to ensure that the Consortium has all licenses required to use any software that may be supplied by the contractor pursuant to the contract.

Data Ownership

The Consortium retains ownership of all data entered into the ILS. Contractor agrees not to disclose Consortium data to any person in any form, without prior consent of the Consortium. Contractor's personnel will have access to Consortium data for the purpose of supporting the Consortium's use of its data. Contractor will not alter any Consortium data without prior consent of the Consortium.

In the event that this contract is terminated for any reason, Contractor agrees to work with the Consortium to provide the Consortium with its data, in a format mutually agreed to by both parties. Following provision of data to the Consortium, Contractor agrees to destroy all copies of Consortium data.

10. SYSTEM FUNCTIONALITY REQUIREMENTS

INSTRUCTIONS:

Complete the following System Functionality checklist electronically so you may add as much comment space as you require. Each RFP submission should include a completed version in paper and electronic format. For each Requirement, mark one of the five middle columns, and provide Comments as needed.

Label	Meaning	Definition
A	Available	Vendor currently supplies this capability as a part of the general software release and this feature will be available in general release and operation in the system proposed to the Consortium. The price is included in the basic system.
O	Optional Addition	Vendor currently supplies this capability as a part of the general software release. This is an added cost item. Please give cost information.
IT	In Testing	Capability is scheduled for commercial release (not beta) within 6 months from the due date of this RFP. Development work is completed and testing is underway. Indicate the expected date for general release, and whether or not the feature will be an additional cost.
ID	In Development	Testing and release planned within 2 years from the due date of this RFP. Indicate the expected date for general release. An explanation of how the specification might otherwise be met using alternative features, functions, products, or services available from the Vendor or a third-party partner, including availability dates and any added costs, either direct or indirect.
NP	Not Planned	Not planned and not under development.
	Comments	Additional comments from the vendor.

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System Functionality Checklist		A	O	IT	ID	NP	Comments
1	General System Functions						
1.01	System is designed to provide security from external and internal data theft or capture. Describe, and note the specific security standards used for software development.						
1.02	System is designed to ensure privacy for patrons. Describe.						
1.03	All network traffic is encrypted						
1.04	Browser-based staff client is HTML 5 compatible with no dependency on 3rd-party plug-ins such as Flash or Java						
1.05	Windows-standard interface functionality, esp. ability to use copy, paste, find, and scroll functions as users expect from experience with their current operating systems						
1.06	Interface elements allow some user-level customization, with administrator opt-in control						
1.07	Windows-standard print functionality						
1.08	For staff functions, ability to move between 'modules' of the system seamlessly						
1.09	When working with records, ability to click on data in fields to launch searches in other modules. Should not have data you can see but not interact with if you are able and allowed to interact with it elsewhere, apart from security-related restrictions.						
1.10	Ability to work with more than one record of a type at a time, with safeguards against editing the wrong record unintentionally						
1.11	Search tools for staff and patrons offer as-you-type suggestions						
1.12	Search tools for staff and patrons offer did-you-mean suggestions						
1.13	Search results lists able to be sorted on every column displayed						
1.14	Complies with the W3C Web Accessibility Initiative's current Web Content Accessibility Guidelines (WCAG 2.0) for all web-based interfaces, or supplies alternative versions of Web pages that comply with the guidelines.						

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System Functionality Checklist		A	O	IT	ID	NP	Comments
1.15	Has useful, contextual Help options available for all staff and patron interfaces						
1.16	Error messages are written with wording friendly to non-administrators						
1.17	Supports export of selected records as delimited files and/or .xls(x) files						
1.18	Supports transaction logging with tracking and roll-back abilities for most record creation and updates. Describe your implementation.						
1.19	Supports optional display of cover art images in all views where staff and patrons access bib. and item records						
1.20	Supports local creation of custom searches based on information in MARC records						
2	Accounting Functions						
2.01	Supports payments and refunds, including credit and debit card transactions, for patrons and staff						
2.02	Can provide an auditable daily cash summary to branches at end-of-business to close out the cash register						
2.03	Credit card processing is PCI DSS compliant. Note which version(s) of PCI DSS it is compliant with.						
2.04	Securely interoperates with Unique Management Services for debt collection services on patron accounts						
2.05	Interoperability with third-party accounting systems, such as QuickBooks						
2.06	Supports reversing and/or editing transactions to correct errors, and can produce auditable logs of such transactions						
2.07	Ability to work with Active Networks CLASS (City of Bellingham cash handling system)						
2.08	Maintain and report deposit account balances for integrated print management system						

System Functionality Checklist		A	O	IT	ID	NP	Comments
3	Acquisitions Functions						
3.01	Automatically manages encumbrances and expenditures in multiple library-defined accounts including but not limited to: selecting, ordering, receiving, claiming, cancelling, invoicing, and reporting						
3.02	Supports maintaining a complete audit trail for fund allocations and adjustments by staff members						
3.03	Provides real-time accounting and budget views, plus reporting, including staff-generated notes						
3.04	Supports the EDI formats that our vendors (Baker & Taylor, Ingram, and Midwest Tape) use: ISO 9735: EDIFACT and ANSI X12						
3.05	Alerts operator of problems occurring during EDIFACT processing, and provides useful assistance in locating the error(s)						
3.06	Ability to automatically update associated information (e.g. order status, fund accounting, item circ. status) when ordering, invoicing, receiving, or cancelling material						
3.07	Supports separate budgets and funds for each member of the Consortium						
3.08	Supports multiple overlapping fiscal periods in fund accounting structure						
3.09	Each member of the Consortium can maintain their own vendor records						
3.10	Ability to arrange funds in a hierarchy or grouping showing encumbered/expended/available amounts (both positive and negative), group subtotals, and a grand total, with ability to view and/or print the full hierarchy						
3.11	Create funds, track balances, change budget amounts, and close existing funds at any time with automatic updating of status						

System Functionality Checklist		A	O	IT	ID	NP	Comments
3.12	Populate an order by creating MARC records, using an existing bib. or purchase request, or downloading an electronic file from vendor site to create a temporary order record when no match is found						
3.13	Ordering workflow recognizes that some vendors use neither EDI nor printed POs and does not require use of either						
3.14	Print or reprint purchase orders or process them electronically, at user's choice						
3.15	Purchase order line items and acquisitions item records can retain the ISBN downloaded from an electronic vendor list into the purchase order, regardless of the first ISBN on the associated bib. record						
3.16	User can choose whether and when to create bib. and holdings when entering orders on an individual PO basis						
3.17	Cancel single titles, partial order, or complete order with automatic updating of fund accounting						
3.18	Should not require manually updating both a catalog record and an acquisitions record after the acquisitions record automatically created the catalog record. If there are both, and one is edited, the other should be able to be updated automatically, too.						
3.19	Supports custom Claims time periods and multiple Claims cycles						
3.20	Undo a payment and/or receipt for a line or a whole order and provide automatic adjustment to order, invoice, fund, and items created						
3.21	Supports placing holds on acquisitions bib. records from a P.O.						
3.22	Supports saving downloaded acquisitions records without having to edit them individually first						
3.23	Ability to print workslips, or not, with optional customization						
3.24	Receive from multiple POs at once						

System Functionality Checklist		A	O	IT	ID	NP	Comments
3.25	Supports broad flexibility to search statements, invoices, and items by fields including by not limited to title, ISBN, purchase order number, and purchase order line number.						
3.26	Allows for invoicing and crediting for encumbered items and items purchased outside the ILS						
4	Administrative Functions						
4.01	Vendor can provide a Service Level Agreement promising 99.9% uptime and 24/7/365 support, with consequences for failing to meet the agreement. Include your standard SLA as an attachment.						
4.02	Supports SIP2 connections						
4.03	Supports granular permissions control for staff user accounts						
4.04	Supports LDAP authentication for staff users						
4.05	Supports configuring different views for different staff						
4.06	Supports administrator control over indexing and searching for any table, field, and sub-field						
4.07	Supports real-time record editing and indexing						
4.08	Supports batch changes to patron, item, and bibliographic records without requiring use of third-party tools to side-step built-in limitations						
4.09	Supports normal records maintenance tasks, such as batch purges of bibs. with no items, or of inactive patrons, within the system instead of requiring use of third-party tools						
4.10	Supports field validation upon entry, in particular for phone numbers; email addresses; fields with specific data types; MARC tags, indicators, and subfields; and fields that should be limited to an index list						
4.11	Field validation rules are customizable						

System Functionality Checklist		A	O	IT	ID	NP	Comments
4.12	Supports multiple configurations of font face and size for receipt printing						
4.13	Supports automated backup and maintenance						
4.14	Supports performing upgrades at times our branches are all closed						
4.15	Either includes or interoperates with a print and public access computing management system						
4.16	System must be an enterprise level SQL compliant database. Detail the platform and current supported release.						
5	Cataloging Functions						
5.01	Supports MARC 21 formats for Bibliographic Data, Holdings Data, Authority Data, and Classification Data, without limitation on record length except as consistent with MARC standards						
5.02	Supports holdings statements of both serial and non-serial multi-part items as defined in ANSI/NISO Z39.71 Holdings Statements for Bibliographic Items, including summary and detailed holdings, mixed level holdings, itemized and compressed formats, and enumeration and chronology displays						
5.03	Capable of importing and exporting all types of MARC 21 formatted records without vendor intervention and with full preservation of all tags						
5.04	Unicode compliant						
5.05	Provides assisted entry of diacritics						
5.06	Supports RDA-compliant MARC records						
5.07	Will support BIBFRAME (elaborate in Comments)						
5.08	Supports the NISO Circulation Interchange Protocol (NCIP), ANSI/NISO Z39.83-1, 2008, NISO Circulation Interchange – Part 1: Protocol						

System Functionality Checklist		A	O	IT	ID	NP	Comments
5.09	Supports the NISO Circulation Interchange Protocol (NCIP), ANSI/NISO Z39.83 – 2 – 2008, NISO Circulation Interchange Protocol – Part 2: Implementation Profile 1						
5.10	Supports the use of both Codabar and Code 39 barcodes for bibliographic items and patron IDs, with the ability to interpret a minimum of 14 digits.						
5.11	Accepts input from third-party suppliers' barcodes and readers, or another library system barcodes, that comply with Codabar or Code 39 standards. Describe any limitations on support of these standards or standard-compliant third-party products.						
5.12	Supports creating and using import/export profiles for bibs. & auth. records using different criteria, e.g. match points, overlay records, create items						
5.13	Supports automatically transferring existing holds in order when bib. records are merged.						
5.14	Supports retaining/transferring existing item, acquisition, and hold information when a bib. record is merged or overlaid						
5.15	Supports automatically checking URLs in the MARC 856 field for current validity						
5.16	Supports custom formatting for spine label printing						
5.17	Offers a spell-check feature that works with bib. and authority records						
5.18	SRU 2.0 compliant for searching/retrieving records from other catalogs						
5.19	Provides notice before deleting a last item record or an item record with a copy specific request						
5.20	Supports full and differential data dumps of the bibliographic database						
5.21	Ability to batch edit Bib. and Authority records						

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System Functionality Checklist		A	O	IT	ID	NP	Comments
6	Circulation Functions						
6.01	Supports custom loan periods based on combinations of factors such as material type and number of hold requests on the bib.; and patron's library, patron type, and status						
6.02	Supports option of emailing patron check-out receipts						
6.03	Provides notifications for upcoming due dates, holds, overdue items, billing notices, and requests cancelled/expired						
6.04	Provides notifications by phone, email (html and text-only), text message, and paper mail, determined by patron preference with library override by notice type, with patron opt-out for Hold notices						
6.05	Provides notifications in multiple languages -- we currently use English and Spanish. Note all available languages.						
6.06	Supports email notifications available as HTML-email or plaintext, at patron's request						
6.07	Supports sending selected phone, email, and text notifications without staff interaction						
6.08	Supports customization of notification messages by library and notification type						
6.09	Supports keeping a history of sent notifications, identifying the patron, item(s), notice type and date, and notification method for a locally-controllable period of time						
6.10	Supports patron transaction receipts in print and email specific to a given library for items checked-out / renewed with due dates; items checked-in with date checked-in; and space for library defined messages / marketing						
6.11	Supports back-dated checkin with preset calendar integration						
6.12	Supports creating temporary item records at checkout ('Fast Add')						
6.13	Checks for existing duplicate patron records when creating a new one						

Bellingham Public Library and Whatcom County Library System
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System Functionality Checklist		A	O	IT	ID	NP	Comments
6.14	Supports merging duplicate patron records, while preserving holds, fines, notifications, and borrowing activity						
6.15	Supports multiple addresses, emails, and phone numbers associated with patron records -- minimum of primary, alternate, and temporary, with optional time periods						
6.16	Supports grouping of patron accounts by family						
6.17	Supports linking minor patron account to accounts of responsible parties (parents/guardians)						
6.18	Supports custom weighting to determine which item fills a hold request by location, material type/collection, and patron type/status						
6.19	Describe in detail your request pull list, esp. in relation to transferring items between branches.						
6.20	Supports local control of deletion time-frame for messages in patron records						
6.21	Supports local customization of fine & fee structures based on item and patron types						
6.22	Supports optional control over charging fines during grace period and days a branch is closed						
6.23	Supports 'floating' collections (items which change owning location depending on last check-in location) with local configuration by branch and collection						
6.24	Supports making items or collections "non-requestable" by collection, branch, number of check outs and/or item status						
6.25	Supports staff-only collections that are hidden from the OPAC and requestable only by staff						
6.26	Supports maintaining link between patron and item for items that are returned damaged or with missing parts						

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System Functionality Checklist		A	O	IT	ID	NP	Comments
6.27	Supports notes in staff-generated blocks that are unconstrained by character-count and -display limitations						
6.28	Supports input from any device that can scan a barcode						
6.29	Supports integration with third-party providers of downloadable digital content, such as OverDrive						
6.30	Supports patron management of downloadable digital content from within the OPAC						
6.31	Supports charging patrons for expired holds						
6.32	Offline circulation – describe the system's options						
6.33	Mobile circulation and patron registration – describe the system's functionality						
6.34	Ability for staff to view multiple prior item statuses						
7	Resource Sharing Functions						
7.01	Supports the ISO ILL Protocol standards, ISO 10160 and 10161-1						
7.02	The system's ISO-compliant ILL Protocol Machine application interacts with the other modules of the library system, particularly circulation and finance applications. Describe how.						
7.03	Supports the transfer of electronic documents in compliance with ISO 17933, Generic Electronic Document Interchange (GEDI). Describe how.						
7.04	Patron ability to see status of ILL requests						
7.05	Patron ability to renew currently checked out ILLs, when allowed						
7.06	Supports configuring limits on patron ILL requests. Describe.						
8	Outreach / Home Service						
8.01	Supports organizing patrons by library-defined criteria, such as route and stop order						

System Functionality Checklist		A	O	IT	ID	NP	Comments
8.02	Supports maintaining a user check-out history to avoid titles previously checked out by a user -- preferably at the Work level, rather than the Bib. or Item level						
9	Reporting Functions						
9.01	Supports reporting on patrons by geography without having to assign a geographic code to patron records – i.e. able to work with addresses via geocoding						
9.02	System provides methods to access all the relevant summary statistics that libraries are required to report to the IMLS annually, and that Washington libraries are required to report to the Washington State Library annually						
9.03	System can be configured to retain such summary statistics for any desired period of time						
9.04	Either comes with, or is compatible with, reporting tool(s) that allow for appropriate staff to create relevant reports and manipulate the output						
9.05	Either comes with, or is compatible with, reporting tool(s) for administrators to create reports that other appropriate staff can access and run at their convenience, or schedule to run and have the results emailed						
10	Web Discovery Platform						
10.01	Has a native, mobile-optimized OPAC that compares favorably with BiblioCommons in features and performance. Describe how it meets the expectations of patrons used to the features in BiblioCommons.						
10.02	Supports BiblioCommons as an alternative to the native OPAC						
10.03	Can import patron usernames and user-generated content (lists, comments, ratings) from BiblioCommons and HIP						

System Functionality Checklist		A	O	IT	ID	NP	Comments
10.04	Native OPAC supports patron self-registration and self-updates to profile info. (addresses, phone numbers, etc.)						
10.05	Native OPAC supports integration of third-party services, including NoveList and OverDrive						
10.06	Native OPAC provides search-engine friendly URLs to support indexing by external search engines						
10.07	Native OPAC offers the interface in more than one language. Note which languages are available.						
10.08	Native OPAC supports patron opt-in for system to keep a history of what they have checked out, for a period of time						
10.09	Native OPAC supports patron control over the number of items to keep in their checked-out history, as well as length of time to keep an item on the list						
10.10	Native OPAC offers patrons optional MARC view						
10.11	Native OPAC supports displaying for patrons both their fines and fees owed, and the potential maximum fines and fees owed for all items currently overdue						
10.12	Native OPAC supports local control of which MARC fields to display, and the labels used to identify them						
10.13	Native OPAC supports logging searches and results for staff analysis						
10.14	Native OPAC either provides single-sign-on capability, or works with third-party (eg. EZProxy) for single-sign-on						
10.15	Native OPAC supports 'suggest-for-purchase' feature that links to patron record						
11	Serials Functions						
11.01	System offers a full-featured serials module to manage serials subscriptions, check-in, prediction, and claims						
11.02	Supports issue check-in both at central branch and local branches						

System Functionality Checklist		A	O	IT	ID	NP	Comments
11.03	Supports integration with serials vendors' systems for invoicing, claiming, etc.						
11.04	Supports integration with the fund accounting/budgeting system used by the Acquisitions module						
12	Software as a Service						
12.01	Cloud-based software-as-a-service (SaaS) system. Describe how, where, and by whom SaaS is hosted, and the platforms that are used: hardware and operating platforms and database management system.						
12.02	Database and server instances subject to on-going full and incremental backups. Provide a full description of the backup system and schedule, including recovery testing.						
12.04	SaaS hosting and operations are covered by a disaster recovery plan with performance guarantees. Describe. Include how delivery would continue during a recovery.						
12.05	Describe communication plans for scheduled maintenance. Include anticipated downtime.						
12.06	SaaS upgrades are provided by the vendor. Describe how, where, and by whom upgrades are handled.						
12.07	Integer and dot releases are scheduled periodically. Describe how often they occur.						
12.08	Vendor provides 24 months' notice prior to terminating support for a product or product version.						
12.09	Security is provided for delivery of the SaaS and its data over the Internet and into local networks. Describe.						
12.10	Local System Administrators and designated staff can run reports and other batch processing operations						
12.11	Local System Administrators and designated staff have access to system policies, tables, settings, and raw data						

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System Functionality Checklist		A	O	IT	ID	NP	Comments
13	Optional Services/Modules						
13.01	Native OPAC can serve as a CMS and be the library's website						
13.02	Children's OPAC						
13.03	Integrated Self-Check						
13.04	Online Event booking/Room booking calendar system						
13.05	Kit reservation and circulation						
13.06	Integrated print management and PC reservation						

11. THIRD-PARTY PRODUCTS

For each integrated Third-party Product, provide responses to the following:

- Vendor can demonstrate integration between third-party product and the ILS being bid.

- Provide at least 2 public library references where this third-party product has been integrated.

- Vendor has a business partnership to resell this third-party product. Please answer Yes or No.

- Vendor offers comparable function, module, or product that can replace this third-party product. If yes, please provide a detailed description of the function/product.

Software	Vendor	ILS Communication Protocol	Demonstrated Integration [Y or N]	2 Public Library References for Integration	Licensed Reseller? [Y or N]	Comparable Product? Describe.
OverDrive	OverDrive	SIP2				
CASSIE	Librarica	SIP2				
CLASS	Active Networks	SIP2				
CircIT and ACS	Tech Logic	SIP2				
i-tiva	Talking Tech	SIP2				

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Software	Vendor	ILS Communication Protocol	Demonstrated Integration [Y or N]	2 Public Library References for Integration	Licensed Reseller? [Y or N]	Comparable Product? Describe.
KitKeeper	Plymouth Rocket	SIP2				
hoopla	Midwest Tape	SIP2				
Freegal	Library Ideas	SIP2				
Zinio	Recorded Books	via HIP				
Variety of online databases	• ProQuest • Mango • Value Line **See Appendix D**	EZProxy, via HIP **[address EZProxy]**				
Library Elf	Jandai Enterprises	via HIP				
mobile app.	Boopsie	via HIP				
Debt Collect	Unique Management	Scheduled tasks that email data to vendor				
BiblioCore	BiblioCommons	'lightweight connector'				
BiblioFines	BiblioCommons	SIP2				

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Software	Vendor	ILS Communication Protocol	Demonstrated Integration [Y or N]	2 Public Library References for Integration	Licensed Reseller? [Y or N]	Comparable Product? Describe.
NoveList Select	EBSCO	Integrated with BiblioCommons				
Syndetic Solutions	ProQuest	Integrated with BiblioCommons				
Room Reserve and Events	Evanced Solutions	Integrated with website but not with ILS				
CollectionHQ	Baker & Taylor	Scheduled SQL queries and FTP				

12.   VENDOR QUALIFICATIONS

Please provide the following:

- A brief description of your firm's background with public library consortia and some history on the proposed ILS.

- Your firm's number of years in business.

- Your firm's number of library customers (as counted by number of servers not library buildings) as well as number of public library customers who currently use the proposed ILS.

- Your firm's number of technical support staff for the proposed ILS.

- For your firm, list any pending litigation, current litigation, and any litigation your firm has been a party to within the past two years.

- Is your firm currently in discussions with any other firms or investors regarding potential sale, merger, or acquisition? Has there been any such discussions in the past two years? If yes, discuss any potential impact on service provision during the anticipated contract term with the Consortium.

13.   REFERENCES

Provide at least three public library references, with contact names, for the Integrated Library System being bid by your firm.

- At least one reference should be a consortium.

- At least one reference must be from a library system that migrated from the Horizon ILS to the proposed ILS.

We are most interested in systems that are broadly similar to these characteristics:
- Over 5 million annual circulations
- Over 1,000 concurrent users, both in-library and remote
- A database of at least 325,000 MARC records
- A database of at least 200,000 patron records

Please provide for each reference:

- Library Name
- Library URL
- Contact Name
- Contact Title
- Contact Email
- Contact Phone
- Month/Year of ILS install

14.   **VENDOR SYSTEM SPECIFICATIONS AND REQUIREMENTS**

System Software

A.   Specify the version of all software included in this proposal.

B.   Describe system performance characteristics. Include response time during peak and normal conditions. Normal load conditions are defined as periods when 40-75% of 225 staff users are performing transactions and 40-75% of the 1,000 patrons are performing searches and/or transactions. Peak load conditions are defined as periods when 76-100% of 225 staff users are performing transactions and 76-100% of 1,000 patrons are performing searches and/or transactions.

C.   Describe the SaaS hosting system, and mechanisms to protect against unintentional loss of data and system programs and to provide for full data and system program recovery.

D.   Describe any components of the software system that are not supported by the Vendor.

Client Hardware, Software, and Networking

A.   Specify minimum and optimum PC workstation requirements for public and staff clients.

B.   Specify licensing requirements for clients.

C.   Specify the OS/browser combinations currently approved for the staff interface, for the patron OPAC, and/or software and drivers needed for staff or public clients to communicate with the server, as is relevant for your system. Describe plans for maintaining capability with OS/browsers over time.

D.   Describe distribution of upgrades and enhancements to the client interface, including the frequency of updates.

E.   Detail what types of changes and customizations are included in the base cost of the proposal, and what types of changes and customizations are excluded but available for additional cost. Is there a time-limit to configuration changes before additional changes are considered billable?

F.   Describe how staff personalize and customize the workstation interface.

G.   Specify whether staff profiles and related configurations are maintained on the server or locally. Describe the process for maintaining personalized settings through software upgrades.

H.   Detail the networking and bandwidth requirements for the service to perform as designed, at the system and branch levels.

On-going Support

A. Describe in detail the support organization.

B. Is there a single point of contact for support questions and other organizational issues?

C. Define the process of submitting change requests, functional requests, and enhancement requests.

D. Describe how documentation, including Administrator and User Guides, are made available.

E. Describe the use of Internet-based reporting or service information delivery to customers.

F. Describe the support community that exists for the proposed system, such as forums, lists, and user groups or interest groups.

15.   EVALUATION CRITERIA

The following criteria will be used to evaluate all bid proposals received in response to this RFP. The vendors of the proposals with the two highest scores as determined by the Joint ILS Selection Committee will be invited to perform on-site demonstrations of the systems they proposed. Committee scores for the onsite demonstrations will be added to the proposal scores using the weighting factors listed below. It is the Consortium's intention to invite the vendor with the highest weighted score on the proposal and demonstration to proceed to contract negotiation.

Weighting	Description
30%	Compliance with functional requirements. The demonstrated ability of the proposed system to provide for system requirements as outlined in the RFP.
20%	Proposed Costs. The cost of the proposed system and services required by the RFP. The breakdown of all proposed costs as requested should be clear, concise and conform to Section 16. COST WORKSHEET.
10%	Vendor's Qualifications as outlined in Section 12.VENDOR QUALIFICATIONS.
10%	Vendor's Relevant Experience as evaluated by references listed in Section 13. REFERENCES.
10%	Third-party Product Integration
10%	On-Site Demonstrations
10%	Staff Preferences
_____	
100%	

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16. **COST WORKSHEET**

Quote unit prices, maintenance rates, delivery charge, installation charge, and training costs for all components of the system on the summary form provided below. You may attach supplemental information to this summary. Indicate warranty periods for all components bid.

Installation of all system components will be accomplished within six months after signing the contract. Indicate any variance or departure from this schedule. All prices, quotes, or proposals are to remain firm for at least ninety (90) days after the closing date for proposals. Copy this page and complete multiple pages if there are insufficient rows to provide the requested information.

A. **Pricing Form for _____ (Vendor Name)**

Item	Unit Price	No. Units	Extended Total Price	Cost for Ongoing Annual Maintenance
ILS Database				
ILS Hosting				
ILS Software (per module if applicable)				
ILS Client (staff use) software (if applicable)				
ILS OPAC				
• Adjustments if OPAC is not used				

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Item	Unit Price	No. Units	Extended Total Price	On Going Maintenance/Renewals Costs
Reporting Software				
Testing Environment				
Customization (estimate)				
Optional Services/Modules				
• Website hosting				
• Children's OPAC module				
• Self-Check module				
• Room Reservations/Events Calendar				
• Kit Reservation and Circulation module				
• Print management and PC reservation				
Delivery				
Installation				
Training				
Documentation				
Travel & Per Diem				
Total System				

Appendix A: Proposal Covering Letter

Letterhead or vendor's name and address

Date

Subject: ***Request for proposal name***
              Request for proposal number
              List any amendment nos. and dates

The enclosed response is submitted in response to the above-referenced Request for Proposal. Through submission of this proposal we agree to all of the terms and conditions of the Request for Proposal.

We have carefully read and examined the Request for Proposal and have conducted such other investigations as were prudent and reasonable in preparing the proposal. We agree to be bound by statements and representations made in this proposal and to any agreement resulting from the proposal.

Sincerely,

_____
                    Signature

Name:_____
                    Type or print

Title:_____

Legal name of vendor:_____

Date:_____

Appendix B: Vendor Response

Mandatory Criteria

Mark the appropriate box(es) for each system component that your proposed ILS system provides natively or via third-party. Systems that do not include all of the Mandatory Criteria will not be considered.

Native	Third-party	Component
☐	☐	Acquisitions
☐	☐	Cataloging
☐	☐	Circulation
☐	☐	Serials
☐	☐	Holds/Requests Management
☐	☐	Patron Notifications by Mail, Email, and Phone
☐	☐	Inventory
☐	☐	Homebound Patron Services
☐	☐	Web-Based Discovery Platform (& optimized for mobile)
☐	☐	Portable/Mobile Circulation System
☐	☐	Cash handling, including interoperability with the City of Bellingham's system
☐	☐	Reporting/Analytics
☐	☐	SaaS hosting
☐	☐	Browser-based staff interface

Mark if the proposed system can:
- ☐ Interoperate with BiblioCommons as a front-end

Mark the optional functions your proposed ILS system provides:

- ☐ OPAC offers ability to serve as library website (CMS)
- ☐ Children's OPAC
- ☐ Integrated Self-Check
- ☐ Room Reservations/Events Calendar
- ☐ Kit Reservation and Circulation
- ☐ Integrated print management and PC reservation

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As appropriate, mark the boxes to confirm acceptance of terms, or provide essay responses:

Scope of Work (see **Section 7**)

    A. Project Management and Timeline

        ☐ Vendor acknowledges responsibility for meeting the project goals and time schedule

    B. Implementation

        ☐ Vendor confirms that their proposal includes development of a Project Work Plan that includes the implementation services noted beginning on Page 12.

    C. Data Conversion: identify any areas where data migrated will need to be modified, truncated, reformulated, or lost as it migrates to the vendor's system.

        _____

        _____

        _____

        ☐ Vendor confirms that the Project Work Plan will specify data scrubbing and data conversion deadlines.

    D. Training

        ☐ Vendor confirms that their proposal conforms to terms.

    E. Testing

        ☐ Vendor's proposal includes testing environment.

        ☐ Vendor confirms that their proposal conforms to terms.

    F. Configuration

        ☐ Vendor confirms that their proposed system will meet indicated performance metrics.

    G. Data Storage, Backup, and Secondary Storage

        ☐ Vendor confirms that their proposed system conforms to description, and will meet the indicated datacenter standard.

On-Site Demonstration

☐ Vendor agrees to included terms regarding on-site demonstration.

Contract & Proposal Information

☐ Vendor confirms that the Selected Contract Clauses are acceptable.

Appendix C: Proposal Submission Checklist

The checklist below notes what **must** be addressed in the proposal. Failure to address all sections of the checklist may result in the disqualification of the proposal.

- ☐ Section 7 – Scope of Work – address each section

- ☐ Section 10 – System Functionality Checklist (paper and electronic)
  - o Include standard Service Level Agreement

- ☐ Section 11 – Third-party Products

- ☐ Section 12 – Vendor Qualifications

- ☐ Section 13 – References

- ☐ Section 14 – Vendor System Specifications and Requirements

- ☐ Section 16 – Cost Worksheet

- ☐ Appendix A – Proposal Covering Letter

- ☐ Appendix B – Vendor Response

- ☐ Electronic copies of user manuals provided via download access or on a flash drive.

Appendix D: Current List of Online Database Subscriptions

ABI/INFORM Trade and Industry

Auto Repair Reference Center

Bellingham Herald - Newsbank

Biography in Context

ChiltonLibrary.com

Consumer Reports

CultureGrams

eLibrary

Gale Virtual Reference Library

Health & Wellness Resource Center

HelpNow by BrainFuse

HeritageQuest Online

History Study Center

Job & Career Accelerator

LearningExpress

Mango Languages

NoveList Plus, K-8, and Select

Powerspeak

ProQuest: National Newspapers Core, Research Library, Family Health, Western Newsstand, and
     Washington State Newsstand

ProQuest Learning Literature

ReferenceUSA

SIRS Discoverer

Small Engine Repair Reference Center

Testing & Education Reference Center

TumbleBook Library

Value Line

World Book Online