



Complete Request for Proposal Package

RFP-2011-29

INTEGRATED LIBRARY SYSTEM

For the City of Claremore

Due Date/Time:

November 29, 2011

By 2:30 p.m.



Advertised in the Claremore Progress November 6, 2011 and November 13, 2011

Request for Proposal Invitation

The City of Claremore will open Request for Proposals, RFP-2011-29, for the Integrated Library System for the City of Claremore November 29, 2011 at 2:30 p.m. in the Council Chambers located at City Hall, 104 S. Muskogee Avenue, Claremore, OK, 74017.

Request for Proposals must be sealed and submitted to the Central Purchasing Agent prior to opening at said address to be considered. The City reserves the right to waive informalities in the bids and reject any or all Request for Proposals for any reason whatsoever at the sole discretion of the City. The successful bidder will be notified in writing.

Please contact Anne Smith, Central Purchasing Agent, at 918-341-1325 or asmith@claremorecity.com with any questions or to receive a bid specification package. Packages are also available at <http://www.claremorecity.com/bids.aspx>



The City requests Request for Proposals for: RFP-2011-29, Integrated Library System for the City of Claremore.

Acceptable candidates are: Established companies regularly engaged in these services.

To receive or view specifications, contact:

Anne Smith
104 S. Muskogee Avenue
Claremore, OK 74017
Phone – (918) 341-1325
Email – asmith@claremorecity.com

The City of Claremore reserves the right to reject any and all bids when such rejection is in the best interests of the City of Claremore. One (1) original and three (3) copies (may be in the same package) of the bid documents should be submitted to one of the following:

Mail, hand or special delivery: City Hall
Central Purchasing Agent's Office
104 S. Muskogee Avenue
Claremore, OK 74017

State on the outside bottom left-hand corner of the bid envelope the following:

RFP-2011-29
Integrated Library System
Do not open until November 29, 2011 at 2:30 p.m.

Due Date: Request for Proposals will be received in the Council Chambers (104 S. Muskogee Avenue, Claremore, OK 74017) and are **due by 2:30 p.m. (as so indicated by the time stamp clock of City of Claremore) November 29, 2011**. Proposals must be received on or before the scheduled opening to be considered. Proposals received more than ninety-six (96) hours, excluding Saturdays, Sundays and holidays before the time set for opening of proposals, as well as proposals received after the time set for opening, will not be considered and will be returned unopened.

Public Opening: Request for Proposals filed with Central Purchasing shall be publicly opened and read aloud at the time stated above and considered by the Mayor and Council in the following next available Council meeting. The opening will be at the City Hall Council Chambers located at 104 S. Muskogee Avenue, Claremore, OK, 74017.

Evaluation/Award: Proposals will be referred to Claremore staff for evaluation. The City of Claremore may award to the "lowest and best"; however, the City reserves the right to reject any and all proposals and to waive any technicalities in the bidding process. No RFP may be altered, withdrawn, or resubmitted within 90 days after the date set of the opening of proposals.



Authorized Personnel Signed

11/01/2011

Date

~ Section One ~

General Information

1.1 Purpose of the Request for Proposals

The City, by means of this RFP, invites all qualified Candidates to submit Proposals in accordance with the requirements outlined in this RFP. The City anticipates that, based on its review and evaluation of the Proposals received pursuant to this RFP, it will select a Candidate and execute a contract whereby the Candidate renders services to the City, in accordance with terms and conditions set forth in the contract.

1.2 Information about the City of Claremore

The City of Claremore is an innovative community near Tulsa, OK with a population of approximately 18,000 citizens. This progressive, forward-thinking city strives to offer a high quality of life that attracts industrial based businesses and employees seeking small-town charm within a major metropolitan area. The City strives to work with the citizens of Claremore to meet the needs of the community while serving everyone with respect and integrity. The City strives to do so with competence, accessibility, responsiveness, and excellence. The same level of customer service is expected of its business partners. The City is committed to its providing the highest level of amenities for the community and the region and is dedicated to the continuous improvement of its facilities.

1.3 Project Overview

The Will Rogers Library is seeking firm quotations for a new Integrated Library System (ILS).

1.4 Background Information on the Library

The Will Rogers Library is a single site, municipal library serving the City of Claremore, Oklahoma, as well as Rogers County. In operation since 1936, the library moved to its current facility in 1994, and comprises 17000 sq. ft. of public and office space; features approximately 60,000 materials, and serves approximately 35,000 patrons annually.

The library has been using The Library Corporation as an ILS provider since 2000, and is currently running ILS software version LS 4.2. The system is currently hosted by TLC.

Today, the library is seeking increased functionality from both the ILS and the Public Access Catalog (PAC) to reflect current standards and practices in ILS capabilities. A strong and responsive training and technical support system is critical to the continued consistent daily operations of the library, and cost is an increasingly critical factor in the choice of such a system. Dependability of connection to the hosted system, speed / functionality, and capability for seamless integration with other library technologies are all key areas in which the Will Rogers Library is seeking high-quality, cost-effective performance.

Description of library with both current statistics and 5 year estimates:

	Current	Projected 5 Years
# of member libraries and branches	Single Site	Single Site
# of bibliographic records	65000	65000
# of item records	65000	65000
# of patrons	35,000	45,000
# of annual circulation transactions	166,000	175,000
# of staff workstations	8	8

1.5 City's Right to Reject

This RFP does not commit the City to select a Candidate or to award a Contract to any Candidate. The City reserves the right to accept or reject, in whole or in part, any Proposal it receives pursuant to this RFP.

1.6 Schedule of Events

- Issue RFP: November 6, 2011
- Advertise in the Claremore Progress November 6, 2011 and November 13, 2011
- Proposal Due Date: By 2:30 p.m. on November 29, 2011
- Contract Award: Upon Council approval on the next available meeting

~Section Two ~

RFP Requirements

2.1 Right to Modify, Rescind, or Revoke RFP

The City reserves the rights to modify, rescind, or revoke this RFP, in whole or in part, at any time prior to the date on which the authorized representative of the City executes a Contract with the selected Candidate. It is important to note the City may award this contract in whole or in part. The City may opt out of servicing some of the locations listed in the Specifications. The City intends to acquire monthly service for most locations; however, some locations may only be treated on a quarterly basis.

2.2 Compliance with RFP Requirements

By submission of a Proposal, a Candidate agrees to be bound by the requirements set forth in this RFP. The City, at its sole discretion, may disqualify a Proposal from consideration, if the City determines a Proposal is non-responsive and/or non-compliant, in whole or in part, with the requirements set forth in this RFP.

2.3 Binding Effect of Proposal

Unless otherwise agreed in writing signed by the City Manager and/or Executive Manager of Budget and Finance, each Candidate agrees to and shall be bound by the information and documentation provided with the Proposal, including prices quoted for services. The Candidate understands and acknowledges that its signature on this agreement constitutes an irrevocable offer to provide an integrated library system to the City of Claremore. Only the City of Claremore Mayor and Council can approve award of the contract.

2.4 Signature, Certification of Candidate

The Proposal must be signed and dated by a representative of the Candidate who is authorized to bind the Candidate to the terms and conditions contained in this RFP and to compliance with the information submitted in the Proposal. Each Candidate submitting a Proposal certifies to both (a) the completeness, veracity, and accuracy of the information provided in the Proposal and (b) the authority of the individual whose signature appears on the Proposal to bind the Candidate to the terms and conditions set forth in this RFP. Proposals submitted without the required signature shall be disqualified.

2.5 Requirements for Submission

Each bidder shall submit one (1) original – which must be clearly defined as the ORIGINAL – and three (3) copies of their proposal. The original shall be clearly readable and preferably prepared on a word processor and formatted in at least 10-point-font. The copies shall be of good, readable quality. The original and copies of the proposal shall be submitted in a sealed box or envelope, clearly state on the outside, bottom left-hand corner of the package as shown:

RFP-2011-29

Integrated Library System

Do not open until November 29, 2011 at 2:30 p.m.

2.6 Deadline for Proposals

Proposals must be received by Central Purchasing Agent's office in the Finance Department by "2:30 p.m. on November 29, 2011". Any proposal received after expiration of the deadline will be immediately disqualified from consideration. To withdraw a proposal, a written request must be made to the Claremore Central Purchasing Agent prior to the scheduled opening.

2.7 Risk of Loss, Damage, Delay

Candidate acknowledges and agrees to release and hold harmless the City of Claremore, its employees, agents, and personnel, from and against any and all claims, liability, damages, and costs, including court costs and attorneys' fees, arising out of or pursuant to delivery of the Proposal or failure to deliver the Proposal to the Central Purchasing Agent's Office of the City of Claremore, as designated in Section 2.5 and 2.6 of this RFP.

2.8 Ownership of Proposals

All Proposals become the physical property of the City of Claremore upon receipt.

2.9 Use, Disclosure of Information

Candidates acknowledge that the City of Claremore is a municipality of the State of Oklahoma and subject to the Oklahoma Open Records Act; therefore, cannot assure the confidentiality of contract terms and other information provided that would be inconstant with the City's compliance with its statutory requirements. Proposals with information marked "confidential" will be rejected upon discovery of such statement. By submitting a proposal, a Candidate specifically assumes any and all risks and liabilities associated with the information contained in the proposal and the release of that information contained in the proposal and the release of that information by the City of Claremore for purposes related to or arising out of the (a) evaluation of Proposals, (b) selection of a Candidate pursuant to the RFP process, and (c) negotiation and execution of a Contract, if any, with the Candidate selected.

2.10 Costs of Participation

The City of Claremore specifically disclaims responsibility and/or liability for any and all cost, expenses, or claims related to or arising out of the Proposer's participation in this RFP process, including but not limited to costs incurred as a result of preparing, copying, shipping, presenting, and/or clarifying the Proposal and the information relevant to the Proposal.

2.11 Compliance with Applicable Laws, Regulations, Ordinances, City of Claremore Policies and Procedures

By submitting a Proposal, the Candidate agrees to and shall comply with all applicable local, state and federal laws and regulations, as well as with all applicable policies and procedures of the City of Claremore. The awarded entity is responsible for any costs of such compliance. Candidate certifies that any subcontractors to be used in the performance of this contractual agreement are in compliance with 25 O.S. Sec. 1313.

Per revisions to the Oklahoma Standards for Drug and Alcohol Testing Act effective November 1, 2011, all employers, including independent contractors, subcontractors or employees of an independent contractor, may be subject to a workplace drug or alcohol testing policy under the terms of the contractual agreement when the drug or alcohol testing policy applies to other workers at the job site or workers who are in the same or similar classification or group.

~ Section Three ~

RFP Procedures

3.1 Rescission of Proposal

A Proposal can be withdrawn from consideration at any time prior to expiration of the deadline for Proposals, as stated in Section 2.6 of this RFP, pursuant to a written request sent to the City of Claremore Central Purchasing Agent's Office. If a Candidate submits more than one Proposal, the most recent proposal submitted prior to the deadline will be the only one considered. The previous Proposal will be considered null.

3.2 Request for Electronic Copy

A Candidate may request an electronic copy of the RFP from the City of Claremore Central Purchasing Agent's Office. Electronic copies are available on the City of Claremore's website www.claremorecity.com/bids.aspx.

3.3 Request for Clarification

The City of Claremore reserves the right to request clarification of any information contained in a Proposal.

3.4 Questions by Candidates and Addenda

Each bidder shall carefully examine all bid documents and all addenda thereto, and shall thoroughly familiarize themselves with the detailed requirements thereof prior to submitting a proposal. Should a bidder find discrepancies or ambiguities in, or omissions from documents, or should they be in doubt as to their meaning, they shall, at once, and in any event, not later than seven (7) days prior to opening due date, notify the City of Claremore, who will, if necessary, send written addendum to all bidders. Published addendums are available on the City website (www.claremorecity.com/bids.aspx). The City of Claremore will not be responsible for any oral instructions. All inquiries shall be directed to Anne Smith, Central Purchasing Agent in writing at asmith@claremorecity.com.

3.5 Pre-Proposal Conference **Mandatory** **Not Mandatory**

A conference is not scheduled for this RFP.

3.6 Communications with City of Claremore

Except as provided in this RFP and as is otherwise necessary for the conduct of ongoing City of Claremore business operations, Candidates are expressly and absolutely prohibited from engaging in communications with City of Claremore personnel who are involved in any manner in the review and/or evaluation of the Proposals; selection of a Candidate; and/or negotiations or formalization of a Contract. If any Candidate engages in conduct or communications that the City of Claremore determines are contrary to the prohibitions set forth in this Section 3.6, the City of Claremore may, at its sole discretion, disqualify the Candidate and withdraw the Candidate's Proposal from consideration.

3.7 Evaluation of Proposals

The Selection Committee will review Proposals in accordance with the procedure and criteria set forth in this RFP. Proposals that are (i) incomplete, (ii) not properly certified and signed, (iii) not in the required format, or (iv) otherwise non-compliant, in whole or in part.

All submittals will be evaluated by a Review Committee. Submittals will be ranked according to the total number of evaluation points assigned by the Review Committee. The Review Committee will generate a short list and interviews with the top candidates will be scheduled so firms can provide a product demonstration, ask questions, and be interviewed by the committee. The Review Committee will then identify one Respondent as "lowest and best".

3.8 Pricing

Pricing is required as it is an integral component of the proposal. Vendor is to provide both initial costs and 5-years of on-going costs for all required software, hardware, support and related services. Optional software, hardware and related services should be detailed and quoted separately. Any 3rd part services should be clearly distinguished.

3.10 Delivery of Services

Delivery will be to the Will Rogers Library at 1515 North Florence Avenue, Claremore, OK 74017 and to be completed within 90 days of contact award. Upon award of the contact, scheduling of delivery shall be coordinated with Sherry Beach at 918-341-1564 or sbeach@claremorecity.com.

3.11 Payment

The City of Claremore shall pay all invoices pursuant to 62 O.S. § 34.71. Payment will not be made on invoices submitted later than six-months (180 days) after delivery of services and any statute of limitations to the contrary is hereby waived. The City may issue itemized purchase orders, blanket purchase orders, or use the City purchasing card (MasterCard) to pay for invoices.

~ Section Four ~

Proposal Contents

4.1 Provision of Information

Each Candidate must provide current, accurate, complete information about all of the following in support of its Proposal. The following items are requested on the Company Questionnaire and must be provided.

I. Business, Financial Information:

1. Name, address, telephone number of references whom the City of Claremore can contact about the Proposal;
2. State of Oklahoma corporate filings, DBA name, registration and tax identification number;
3. Name(s) of Owner(s) or partners or directors, as applicable;
4. Names, titles, and resumes of Candidate officials who will serve as primary Candidate contacts;
5. Length of time and years during which the Candidate has provided the services contemplated by this RFP

II. Services, Plans, Reports, Billing

1. Procedures followed when contacted by a City official about issues related to the services.
2. Methods, procedures, and processes to ensure quality control.
3. Billing procedures and processes utilized by the Candidate

4.2 Candidate Affirmation Clause

Each Candidate must affirm and incorporate in its Proposal all of the Affirmation set forth in this section. If the City of Claremore determines a Candidate has submitted a false statement, in whole or in part, in regard to any of these affirmations, then the City of Claremore will disqualify the Candidate from consideration and report the false statement as such to the Oklahoma Department of Commerce. Also, the City of Claremore will remove the Candidate from the Master Bidders List of the City. Accordingly, the Candidate affirms all of the following, without limitation

- a. The Candidate has not conferred or offered to confer, either directly or indirectly, any benefit whatsoever on a public servant in connection with the submitted Proposal or the subject matter of the Proposal;
- b. The Candidate either is not subject to the payment of franchise taxes to the State of Oklahoma or is not currently delinquent in regard to the payment of franchise tax owed to the State of Oklahoma;
- c. The Candidate, individually or acting by and through its officers, principals, employees, contractors, subcontractors, agents, or personnel, has neither (i) violated state or federal antitrust laws nor (ii) communicated any of the contents of the Proposal to its competitors or any other person or entity engaged in such line of business;
- d. The Candidate did not participate in or receive compensation for preparation of the RFP;
- e. The Candidate shall defend, indemnify, and hold harmless the City of Claremore, all of its officers, agents and employees from and against all claims, actions, suits, demands, proceedings costs, damages, and liabilities, arising out of, connected with, or resulting from any acts or omissions of the Candidate or any agent, employee, subcontractor, or supplier of contractor in the execution or performance of the resulting contract;
- f. The Candidate expressly acknowledges that state funds may not be expended in connection with the purchase of an automated information system unless that system meets certain statutory requirements relating to the accessibility by persons with visual impairments. Accordingly, the Candidate represents and warrants to the City of Claremore that the technology provided by Candidate for purchase is capable, either by virtue of features included within the technology or because it is readily adaptable by use with other technology, of:
 - (1) providing equivalent access for effective use by both visual and nonvisual means;
 - (2) presenting information, including prompts used for interactive communications, in formats intended for both visual and nonvisual use; and
 - (3) being integrated into networks for obtaining, retrieving, and disseminating information used by individuals who are not blind or visually impaired.

For purposes of this paragraph, the phrase "equivalent access" means a substantially similar ability to communicate with or make use of the technology, either directly by features incorporated within the technology or by other reasonable means such as assistive devices or Services which would constitute reasonable accommodations under the federal Americans with Disabilities Act or similar state or federal laws. Examples of methods by which equivalent access may be provided include, but are not limited to, keyboard alternatives to mouse commands and other means of navigating graphical displays, and customizable display appearance.

4.3 Proposal Response Format

Each of the following products shall be submitted by the time mentioned herein in order for the proposal to be considered:

- Vendor Profile (Background, Product Line, Financial Information, Staff Information)
- Company Questionnaire (Use form)
- Workstation Requirements (Staff and Public)
- Deviations from Specifications (Use form)
- Response to Specifications (Use form)
- Cost Proposal (Use form)
- Additional Information
 - **Signed** and completed Non-Collusion Affidavit (page 40)
 - **Signed** and completed Interest Affidavit (page 41)
 - **Signed** and completed W-9 (page 42)

~ Section Five ~

Evaluation, Selection, Award

5.1 Discussions with Candidates

The City of Claremore may conduct discussions and/or negotiations with any Candidate that appears to be eligible for award ("Eligible Candidate") pursuant to the selection criteria set forth in this RFP. In conducting discussions and/or negotiations, the City of Claremore will not disclose information derived from Proposals submitted by competing Candidates, except as and if law requires disclosure.

5.2 Modification of Proposals

All Eligible Candidates will be afforded the opportunity to submit best and final Proposals if (a) negotiations with any other Candidate result in a material alteration to the RFP and (b) such material alteration has a cost consequence that could alter the Candidate's quotations regarding rates for Service.

5.3 Selection of Candidate

The Candidate selected for award will be the Candidate whose Proposal, as presented in response to this RFP and as determined by the City in accordance with the evaluation criteria set forth in Section 5.5, to be the most advantageous to the City. Candidates acknowledge that the City is not bound to accept the lowest-priced Proposal. The review committee will create a short-list of the top candidates and will conduct a double sided interview.

5.4 Evaluation of Proposals

The City personnel, including personnel who serve on the Selection Committee, will evaluate proposals. Submission of a Proposal indicates the Candidate's acceptance of the evaluation process set forth this RFP and the Candidate's acknowledgement that subjective judgments must be made by the City in regard to the evaluation process.

5.5 Criteria for Evaluation

The library will base the selection on:

- Age of system and system provider and suitability for projected length of relationship with vendor
- Functionality for the library
- Platform suitability (operating system and database)
- 3rd Party Product Support (how much of the product(s) are supported by the vendor and those by 3rd party)
- Ease-of-use for staff and public
- Detailed identification of both initial, and add-on subsystems and 5 year costs
- Customer Support Metrics
- References

5.6 Consideration of Additional Information

The City reserves the right to ask for and consider any additional information deemed beneficial to the City in evaluation of the Proposals.

~Section Six ~

General Terms and Conditions

6.1 Termination

The Contract may be terminated on the first to occur of the following:

- Termination with Cause: In the event either the City or the Candidate shall, with or without cause, at any time give to the other at least 30 days' advance written notice, the Contract shall terminate on the future date specified in such notice.
- Mutual Agreement: In the event either the City or the Candidate mutually agree in writing, the Contract may be terminated on the terms and date stipulated in the writing.
- Termination by Default: In the event either party shall give notice to the other that the other Party has substantially defaulted in the performance of any obligation under the Contract, and the default has not been cured within 10 business days following the receipt of such notice by the Party alleged to be in default, the Party giving notice shall have the right to terminate the Contract immediately, upon the close of City business or at 4 p.m., Central Standard Time on the 10th business day after notice was received.
- Termination for Insolvency, Bankruptcy, Assignment to Creditors: The City may, without further notice, terminate this Agreement immediately if the Candidate (i) petitions for reorganization under the Bankruptcy Code or is adjudged bankrupt; (ii) becomes insolvent or a receiver is appointed due to the insolvency; or (iii) make a general assignments or sale of its assets or business for the benefit of creditors.
- Funding Out: The City shall have the right to cancel this contract at the end of the then current budget period if funds are not allotted for the next budget year to continue this contract. The City may effect such cancellation by giving the Candidate written notice of its intention to cancel not less than thirty (30) days prior to the end of the current budget period, stating its reasons for cancellation. Upon cancellation of this contract as provided in this section 7.2, the City shall not be responsible for the payment of any services received which occur after the end of the current contract period.

6.2 Indemnification by the Candidate

The Candidate agrees to and shall indemnify and hold harmless the city and their officers, agents, employees, and personnel, from and against claims arising out of or attorneys' fees and for general conduct, whether based upon Candidate, employment, apparent Candidate, joint venture, partnership, or any other legal theory by which liability is adjudged against the City for the acts, intentional acts, omissions, negligence, or gross negligence of the Candidate and/or any personnel or individuals providing Services on behalf of the Contractor pursuant to the Contract. The indemnification obligations set forth in the Contract shall survive termination or expiration of the Contract.

6.3 Right to Inspect

The City retains the right to examine, inspect, audit, and copy, regardless of location, any and all documents, records, files, data, and information generated or utilized by the Candidate in the performance of the Contract.

6.4 Definition of Terms

- Contract: The term "Contract" shall mean the written agreement, if any, executed by authorized representatives of the City and the Selected Candidate(s) that formalizes the terms, provisions, covenants, and obligations, including but not limited to those contained in this RFP, of the respective parties to the arrangement for provision of Service.
- City Liaison: The term "City Liaison" shall be defined as the (title of individual who will serve as primary contact for purposes of the RFP and the resulting contract, if any) and/or his/her designee.
- Candidate's Personnel: The term "Candidate's Personnel" shall mean and include any and/or all of the following, without limitation: employees, leased employees, agents, officers, directors, staff, independent contractors, contractors, or subcontractors, or any individuals

furnished, referred, or provided by the Candidate for purposes arising out of or related to this RFP, the Candidate's Proposal, and the Contract, if any, that results from the award made by the City to the Selected Candidate.

- Budget Year: A budget year begins on July 1st and ends on June 30th.

~ Section Seven ~

Insurance

7.1 Required Coverage

For the duration of the agreement, for all renewal terms, and for purposes of indemnification obligations that are specified to survive termination or expiration of the agreement, Candidate shall obtain, at its sole expense and at no cost to the City, the following coverage and shall maintain such coverage in full force and effect:

- Workers' Compensation: Workers' Compensation covering all individuals who provide Services pursuant to the agreement at the request of the Candidate, at the statutory limits in effect as of the Effective Date of the Contract and as modified from time to time by the regulatory body or insurance carrier charged with administering Workers' Compensation for the State of Oklahoma.
- Commercial General Liability: Commercial General Liability, including operations, Contractual liability, and products liability in the combined single limit of not less than one million dollars (\$1,000,000) per occurrence and two million dollars (\$2,000,000) in the aggregate.
- Automobile Liability: Comprehensive Automobile Liability Insurance in the combined single limit of not less than one million dollars (\$1,000,000).
- Employer's Legal Liability: Employer's Legal Liability in amounts of not less than five hundred thousand dollars (\$500,000) per accident, five hundred thousand dollars (\$500,000) for disease (policy limit), and \$500,000 for disease (per person).

7.2 Effect of Indemnification Obligations

No Provision, term, or condition in the Contract regarding indemnification obligations shall be construed to limit the application of insurance procured by the Candidate in accordance with requirements set forth in the Contract.

7.3 Additional Named Insured, Subrogation

With the exception of the Workers' Compensation policy, The City of Claremore shall be an additional-named insured on all policies, and subrogation against the City must be waived.

7.4 Notification of Cancellation

Each insurance policy shall contain a covenant by the insurance company issuing the policy that the policy will not be modified or canceled unless thirty (30) days prior written notice of modification or cancellation is given to the City Clerk and the City Attorney. In the event the Candidate receives notice of modification or cancellation of any of the policies required under the Contract, then, prior to the effective date of modification or cancellation of the policy, the Candidate shall obtain a policy of insurance affording the required coverage from an insurance carrier acceptable to the City. If the Candidate fails to obtain such an insurance policy, the City may immediately terminate the Contract without further notice to the Candidate.

COMPANY QUESTIONNAIRE

Attach sheets if additional space is needed to fully answer any question

Submitted By: _____

Principal Office: _____

1. Does your organization accept MasterCard payments? _____ If yes, list and explain any additional fees for accepting MasterCard payments? _____

2. Procedures followed when contacted by a City official about issues related to the services.

3. Explain your company's methods, procedures, and processes to ensure quality control.

4. Explain your firm's billing procedures and processes.

5. How many years has your organization been in business in the line of work specified in this bid under your present business name? _____

6. How many years of experience in this field of work does your organization have?

7. List below at least 3 references that are similar in size to the Will Rogers Library and have possibly migrated from the same system we currently have.

Name:

Title:

Library:

Telephone:

E-mail:

Web address:

Date of install:

Name:

Title:

Library:

Telephone:

E-mail:

Web address:

Date of install:

Name:

Title:

Library:

Telephone:

E-mail:

Web address:

Date of install:

8. Have you ever failed to complete any work awarded to you? _____

If so, where and why: _____

9. Has any officer or partner of your organization ever been an officer or partner of any other organization that failed to complete a contract? _____

If so, state the name of the individual, other organization and reason therefore:

10. Has any officer or partner of your organization ever failed to complete a contract handled in his own name? _____

If so, state the name of the individual, name of the owner and reason therefore:

11. In what other lines of business are you financially interested?

The undersigned hereby declares that all the information furnished in this questionnaire is true, complete, and correct to the best of his knowledge and belief; and that all persons named as references are authorized to furnish any information necessary for verification.

_____ By: _____

Name of Organization

Signature

Printed Name

Title Date

Workstation Requirements

Please describe the minimum and recommended PC configuration for staff and public clients.

Response to Specifications

Vendors must respond to every requirement contained in the Specifications section of the RFP using the following criteria. Vendor's responses must be in the same order in which questions appear in this RFP, and must use the same numbering scheme used in this RFP.

A	Available	Vendor currently supplies this capability as a part of a general software release.
D	In development	Testing and release planned within 2 years from the due date of this RFP.
P	Planned	Capability is planned; no development is underway.
N	Not available	Not planned, and no development underway.

For any specifications to which the Vendor answers other than A (Available), Vendor must describe:

- The feature, function, product, or service being planned or developed, indicating the date after which the function and feature will be available in general release and operation in the system proposed to the library.
- Whether the library will incur any added cost for the feature, function, product, or service once it becomes available, either as a direct cost of the feature, function, product, or service, or because the feature, function, product, or service will require replacement of or addition to hardware or software originally proposed for initial installation.
- If the feature, function, product, or service is not available, in development or planned, 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 for any such alternative and any added costs, either direct or indirect.

Any such exception taken to any specification must be stated on the Deviations From Specifications form. Vendors are advised that the library is interested in receiving proposals from vendors who can offer an integrated library system (ILS) already in use by an installed customer base, and that proposals for systems in an Alpha or Beta phase of development will not be considered. The library reserves the right to evaluate all proposals solely on the basis of currently existing features, functions, products, or services meeting the specifications as stated.

I. System Requirements	A	D	P	N
1. The ILS must comply fully with the Z39.50 version 3 standard on both the client and the server sides.				
2. At a minimum, the ILS must include the following as the core product:				
a. Circulation (including inventory and offline)				
b. Cataloging with authority control				
c. Bibliographic Import				
d. Acquisitions with fund accounting				
e. Electronic ordering (EDI)				
f. Selection List import via 9XX				
g. Serials Control				
h. System administration				
j. Public Access Catalog (including remote patron authentication)				
k. eCommerce for patrons				
l. RSS Feeds				
m. Z39.50 Interface				
n. Web-based Reporting				
3. The following must be available at library's option:				
a. Self-Check (SIP2 or NCIP) Interface				
b. Debt Collection Interface				
c. Inventory Manager				
d. Mobile PAC				
e. Multilingual PAC (List other desired PAC languages)				
f. Enhanced Data Content for PAC				
g. Cataloging Record Source – Bibliographic, Authority and Audio/Visual				
h. Real-time Authority Header Update Service				
i. Weekly Authority Header Update Service				
4. The ILS must include its own SMTP email server for sending out email notices to patrons.				
5. The ILS must enable operators to access any and all system functions for which they are authorized from any screen on any workstation; limited only by the library's choice.				
6. The ILS must not require a separate login to access different subsystems; the initial login must set all privileges for all subsystems.				
7. The ILS must offer a user-friendly search tool that is the same across all subsystems.				
8. The library must have the option to set the search tool to use an auto-suggest feature for keyword and phrase searches for patron, item, bibliographic and authority records.				
II. Vendor Qualifications/Implementation	A	D	P	N
1. The ILS vendor/provider must include as standard:				
a. data migration services				
b. software (operating system, database and application)				
c. server hardware and any additional hardware components or				

peripherals specific to the proposed system.				
d. policy profiling/generation				
e. installation and database loading				
f. training on all subsystems				
g. documentation				
h. hardware and software maintenance				
2. 85% or more of the vendor's customers must be public libraries.				
3. Vendor must offer enhanced content of the library's catalog records and PAC through automatic web links to:				
a. book jacket images				
b. book reviews, summaries, annotations, etc.				
c. Best Seller lists				
d. ability to link to Novelist				

Please highlight the System strengths your ILS has for the Will Rogers Library, detailing added costs and/or 3rd party services:

III. Circulation Requirements	A	D	P	N
<i>The library considers that all ILS vendors provide basic/advanced circulation functionality. Following is a list of specific features desired by the library.</i>				
Data and records management				
1. The ILS must support an unlimited number of patron types without vendor intervention.				
2. The ILS must support permissions that can be set by staff member or workstation to restrict viewing and/or modifying patron records.				
3. The ILS must support manual creation of patron records.				
4. The ILS must support the ability to merge duplicate patron records, moving all fines, fees, notes, and circulation history from the record to be deleted to the surviving record.				
5. It must be possible to remove patron identification data from circulation transaction records and item histories.				
6. The ILS must allow default values to be set when creating new patron records.				
7. The ILS must allow the library to define the following fields as Required: name, address, birth date, gender, password and statistical class.				
8. The ILS must support the ability to display patron photos in the patron registration and check-out screens.				
9. It must be possible to capture patron photos from a Webcam, a digital camera, or to load images from an existing file.				
10. The ILS must offer a self-registered patron immediate, but limited privileges as determined by the library.				
11. The patron record must accommodate multiple patron addresses.				
12. The ILS must allow the library to create user-defined fields in the patron record for its own use .				
13. User-defined fields must be able to be defined as free-text fields or drop-menu fields with selectable options.				
14. The ILS must display a patron's last activity date and time. The date should be incremented for online activity as well as circulation.				
15. The ILS must support searching patron records by, but not limited to, the following access points:				
a. Barcode				
b. Last name, First name				
c. First name, Last name				
d. Address				
e. Phone				
f. E-mail				
g. Fields defined by the library (user-defined fields)				
h. Expiration date				
i. Registration date				
j. Last activity date				
k. Zip code				
l. Notes				
m. Blocks				
16. The ILS must support the ability to enter only the significant digits of the patron barcode for ease of use in the staff client and PAC.				
17. The patron record must offer private notes for staff use and "blocking" notes that will alert the staff member during check-out.				
18. The ILS must support a patron-based option to save reading history.				

19. The ILS must support the ability to sort the reading history by check-out date, title, and author.				
20. The ILS must support linked or associated borrowers (family links).				
21. The ILS must support the ability to perform global “search and replace” operations on a selected group of patron records (record set functions).				
22. The ILS must allow staff with sufficient privilege to delete patron records individually.				
23. The ILS must support the automatic deletion of patron records based on a library-defined period of inactivity.				
24. It must be possible to stop the automatic deletion based on certain criteria:				
a. an amount of money owed				
b. any charge incurred within x days				
c. items out				
d. items on hold				
Check Out				
25. The ILS must support an unlimited number of item types.				
26. The ILS must support an unlimited number of patron types.				
27. The ILS must calculate loan periods and due dates according to the type of borrower and type of material.				
28. The ILS must support the ability to set all loan period calculations, loan limits and thresholds at the library level.				
29. The ILS must support the assignment of specific due dates based on exact date or a selected number of days, hours or minutes. (Special loan periods).				
30. The ILS must support the ability to apply a special loan period to one item during a check-out or to all items checked out to an individual patron, or to all items checked out to all patrons during the entire check-out session.				
31. The ILS must support the ability for the library to specify which kinds of materials may be borrowed by which kind of patron.				
32. The ILS must support the ability for the library to specify a limit on the total number of items any patron may have at one time. The limit may be set by library for each patron type.				
33. The ILS must support the ability for the library to specify a limit on the number of items of any particular type a patron may have at one time. The limit may be set by library for each patron type.				
34. The ILS must support the ability for the library to specify a limit on the number of overdue items a patron may have at one time. The limit may be set by library for each patron type.				
35. The ILS must support the ability for the library to specify a limit on the number of lost items a patron may have at one time. The limit may be set by library for each patron type.				
36. The ILS must support the ability for the library to specify a limit on the number of claimed items, a patron may have at one time. The limit may be set by library for each patron type.				
37. The ILS must support the ability for the library to specify a limit on the total number of hold requests any patron may have at one time. The limit may be set for each patron type				
38. The ILS must support the ability for brief item and bibliographic records to be created “on the fly” to allow uncataloged items to circulate				
39. Item records added during “circ on the fly” must be added to the bibliographic database immediately.				
40. The ILS must provide an option to configure what patron data displays during check-out.				
41. The ILS must provide a direct link to the complete patron record from				

check-out.				
42. The information displayed in the patron record must include, but not be limited to:				
a. All patron registration information				
b. A summary list of the patron's current standing, showing all blocks, number of items out, number of items overdue, total amount owed, number of claimed and lost items, number of items on hold, and notes.				
c. A complete list of all items currently out to the patron, showing barcode, author, title, check-out date, due date, material type, number of renewals allowed, and number of renewals taken.				
d. A clear indication of any item that is overdue.				
e. A summary of notices sent for overdue items including dates sent and notification method. It must be possible to sort the display of this list by any heading on demand.				
f. A complete list of items claimed and lost.				
g. A complete list of all hold and ILL requests, showing author, title, call number, material type, date placed, status, pickup library. This list must distinguish item-specific and title level holds. It must be possible to sort the display of this list by any heading on demand. It must be possible to link directly to the hold request.				
h. A complete list of all outstanding charges and any credits.				
i. A complete list of all prior charges, fines, payments and credits.				
43. The ILS must display all appropriate blocks or stops on a patron record at the point of check-out.				
44. The ILS must support the ability for the staff member to link directly to the appropriate screen to manage the block.				
45. The ILS must support the ability to renew items directly from the list of current items out.				
46. The ILS must support the ability for the patron to renew items from PAC. This ability should be optional and determined at the library level.				
47. The ILS must support the ability to renew all or selected items with a single command.				
48. The ILS must support the ability to designate certain items as non-circulating. These items will be stopped at check-out.				
49. If a previously overdue or lost item is checked out to a new patron, the ILS must automatically charge the previous patron or waive the charges automatically according to library policy.				
50. The ILS must support the ability for the library to configure the contents of check-out receipts.				
51. The ILS must support the ability for a custom note to be added to check-out receipts.				
52. The ILS must support the ability to link to item records from the patron payment record.				
53. All alerts and on-screen messages must be accompanied by a sound. It must be possible to configure what sounds accompany the message.				
54. Key alerts and on-screen messages must have the option to be highlighted or placed in a contrasting color for ease of visibility.				
55. The ILS must show circulation use statistics, as an indication of how heavily the title is being circulated or requested, to aid in collection development.				
Offline Circulation				
1. The ILS must provide an offline function to charge and discharge materials on a circulation workstation or on a portable device and to load these				

transactions into the on-line circulation System at a later time.				
2. The offline upload function should be integrated with the circulation interface, not requiring the staff member to leave the program in order to upload the files.				
3. The ILS must produce a report of uploaded files showing any exceptional conditions, such as items to be put in transit or items to fill hold requests.				
4. The ILS must allow the ability to register patrons offline.				
5. The ILS must allow the ability to compensate for unexpected closed days when offline files are uploaded to prevent patrons from being charged unfairly for overdues.				
6. The status text to be displayed for shelving status can be customized by the library.				
7. The time to display the shelving status can be set differently by material type.				
8. The ILS must retain a link to the previous borrower after the item is checked-in.				
9. After an item is checked-in, it must be possible to determine:				
a. When (date, time) the item was checked-in				
b. Where (workstation) the item was checked-in				
c. When the item was last checked-out				
10. The ILS must also alert the user to any pre-existing charges and allow the user to manage all charges at once.				
11. The ILS must support check-in receipts.				
12. The ILS must alert the staff member to items that should trap for a hold request.				
13. When trapping, the staff member must have the ability not to trap the item				
14. If the staff member does not permit the item to be held, the ILS must prompt to keep or cancel the hold request.				
15. The ILS must alert the staff member of overdue fines on incoming items and allow him/her to Pay, Waive or Charge the patron account.				
16. The staff member must have appropriate privilege to pay or waive fines.				
17. The ILS must support “distributed waives”, the ability to waive a partial amount from several fines simultaneously.				
18. The ILS must support the ability for a staff member to access a patron account directly from check-in or check-out to manage charges if desirable.				
19. The ILS must support the ability for calculation of the fine amount to include a grace period.				
20. The grace period must be able to be defined by material type.				
21. The ILS must support the ability to manually add a charge to a patron record.				
22. The ILS must support fine payment by credit card. Credit card payments will be supported:				
a. in the staff client				
b. by patrons from the PAC				
c. from the self-check unit				
23. The ILS must keep all completed account transactions in a patron account history for a library-determined length of time, up to and including the life of the patron account.				
24. The ILS must support the ability to retain item data in the patron financial history (charges/payments) even if the item is deleted.				
25. The ILS must support printing of fine receipts.				
26. The ILS must support the ability for fine receipts to be printed from any point in the program where fines can be paid (check-in, check-out, patron account)				

27. The ILS must support the ability for the content of fine receipts to be configured by library.				
28. The ILS must automatically set items long overdue to lost when billed.				
29. The ILS must support the ability to set different policies and automatic charges for Replacement, Processing, and Overdue charges.				
Patron Notices				
1. The ILS must support each of the following notice types:				
a. Courtesy or “almost overdue”				
b. Overdue				
c. Fine				
d. Bill				
e. Statement of all charges				
f. Collection agency				
g. Hold pickup				
h. Hold cancellation				
i. Registration about to expire				
2. The ILS must support the ability to send notices by print, e-mail, text message, or phone.				
3. The ILS must support multilingual notification.				
4. The language used in the notification must be able to be set automatically according to the language preference specified in the patron record.				
5. The ILS must have the ability to post predefined and free-text messages to specific patron accounts.				
6. The ILS must be able to specify the staff members who are permitted to post messages to patron accounts..				
7. Patrons must be allowed to read and manage these messages from their OPAC account.				
8. When the patron marks the message as read, the read status must be noted in the patron account in the staff client.				
9. The ILS must provide the ability to delete patron messages manually or automatically according to a library-defined time limit.				
10. The ILS must support the ability for the library to determine the method for sending each individual notices, including each separate overdue notice (for example, 1st overdue by e-mail, 2nd by print, etc)				
11. The ILS must support the ability for the staff member to determine the entire text of all notices separately and easily modify the text as necessary.				
12. The ILS must store and display a history of overdue notices and bills sent to the patron for all items currently overdue or billed.				
13. The notice history must be kept until the items are returned.				
14. The notice history includes item title, date sent and method (print, e-mail, or phone).				
15. The ILS must provide notification statistics reports.				
16. The ILS must support the ability for the staff member to produce on demand a summary statement of all charges owed.				
17. The statement may be produced for any individual patron or group of patrons.				
Holds and ILL				
1. The ILS must support the ability to place requests for any copy of a title (title level hold), a specific item (item level), or the first available copy of an item in a serial or multi-part set (such as the first available copy of season 1 of a TV series).				
2. The ILS must support the ability to place multiple requests for a single				

patron in one operation, without placing multiple individual requests.				
3. The ILS must support the ability to place requests for a single title for multiple patrons in one operation, without placing multiple individual requests.				
4. The ILS must support the ability to group multiple requests in such a way that when any one is filled, the others in the group are cancelled (For example, to get the first available copy of any of several Shakespeare plays.)				
5. The ILS must support the ability for patrons to place requests from the PAC.				
6. The ILS must support the ability to allow the patron to enter a note along with the request.				
7. The ability for the patron to add notes to the request from PAC must be optional and determined by library.				
8. The ILS must support the ability to designate an expiration or “not needed after” date when placing a request.				
9. The ILS must support the ability to distinguish requests placed from the PAC, both visually and for reporting purposes.				
10. The display of titles in the PAC must include a count of all open requests.				
11. The ILS must display a message at PAC to inform the patron if other requests are open for the title, and how many requests are open.				
12. The ILS must support the ability to suppress this message according to library policy.				
13. The ILS must support the ability for patrons or staff to “suspend” a request after it is placed so that it can be filled at a later time.				
14. The ILS must support the ability for a suspended request to maintain its position in the queue or to be placed at the end of the queue when reactivated, according to library policy.				
15. The ILS must support the ability for staff to add notes to a request from the staff client.				
16. The ILS must support the ability to add a note to the request that will print on the hold slip when the request is filled.				
17. The ILS must support the ability to set a charge for hold requests.				
18. If there is a charge for hold requests, it must be possible to display a library-customizable message, advising the patron of the cost.				
19. The ILS must support the ability to set a different holds policy for the PAC and staff client.				
20. The ILS must support the ability to automatically change the due date of circulated items if the number of hold requests exceeds the number of available copies by a library-determined amount.				
21. The ILS must support the ability to either stop a check out or permit check out if the item will fill a hold for another patron.				
22. The ILS must support the ability for a staff member with sufficient privilege to adjust the order of requests in a queue at any time.				
23. The ILS must support the ability for staff with sufficient permission to manually fill a request at any time with an item in hand that is appropriate to the request, rather than wait for the system to identify and hold an item.				
24. The ILS must support the ability to restrict specific items or material types from filling hold requests.				
25. The ILS must support the ability to prevent items with certain statuses (such as Lost or Withdrawn) from filling holds.				
26. The ILS must produce a printed pick list of requests to be filled.				
27. The ILS must support the ability to change the sort order of the displayed or printed list to suit the library’s needs.				

28. The ILS must generate a notice to the patron when an item is held.				
29. The ILS must generate a notice to the patron if a request is cancelled or cannot be filled.				
30. The ILS must print a slip when the item is trapped for the request				
31. The ILS must support the ability to customize the content of a hold slip.				
32. The ILS must support the ability to print a “pick-up slip” with extra large print for libraries that set held items out for patron self-pickup.				
33. The pick-up slip must preserve patron privacy.				
34. The pick-up slip must be printable as a slip to be inserted in the item or a wrapper for the outside.				
35. The ILS must display and print a list of items not picked up and need to be returned to circulation. (Referred to as Unclaimed requests.)				
36. The ILS must support the ability to change the sort of the displayed and printed list of unclaimed items.				
37. The ILS must support the ability to automatically delete all cancelled, unfulfilled or expired requests after a library specified period of time.				
38. The ILS must support the ability to search for hold requests by:				
a. Author				
b. Title				
c. Requestor (patron)				
d. Patron type				
e. Pickup library				
f. Format				
g. Date placed				
h. Pickup date (Unclaim date)				
i. Expiration date				
j. Request status				
39. The ILS must support the ability to link to all records associated with a hold request in one step (patron record, bibliographic record, item record).				
40. The ILS must support the ability to link from any bibliographic, item or patron record back to the hold in one step.				
41. The ILS must support the ability to view all active hold requests attached to a bibliographic record at any time.				
42. The ILS must support the ability to view all active hold requests for a patron at any time.				
43. The ILS must support the ability to route a local hold request out to OCLC for ILL.				
44. The ILS must offer a report that shows how many days it took to fill hold requests from the date the request was placed to the date the item was placed on the hold shelf.				

Self-check				
1. The ILS must be able to interface with a self-checkout machine that allows borrowers to check out their own materials.				
2. The ILS should be able to interface with Tech-Logic self-checkout machines				

Please highlight the Circulation module strengths your ILS has for the library, detailing added costs and/or 3rd party services:

IV. Cataloging Requirements	A	D	P	N
<p><i>The library considers that all ILS vendors provide full MARC 21 support, authority control and import/export functionality.</i></p> <p><i>Following is a list of specific cataloging features desired by the library.</i></p>				
1. The ILS must incorporate MARC21 validation tables to verify a high quality and consistency of cataloging input. These tables must be applied to both imported and manually created records.				
2. The cataloger must have the ability to indicate that a bibliographic and/or item record not be available for retrieval in the PAC.				
3. The ILS must allow cut, copy and paste commands for MARC record editing.				
4. The ILS must support varieties of import template capabilities, including item level information mappings.				
5. The ILS must combine and overlay records from bibliographic utilities, using library-defined match points.				
6. During the duplicate detection process, the ILS must offer the ability to overlay some or all of the duplicates with the open bibliographic record.				
7. The ILS must supply templates containing required and recommended bibliographic fields. These templates must be modifiable by library staff.				
8. The ILS must support the ability to set a default shelving scheme for new item records.				
9. The ILS must support the ability to bulk change bibliographic and item records.				
10. The ILS must support both the 10-digit and 13-digit ISBN standard for searching for bibliographic records and in the duplicate detection process.				
11. The ILS must provide macros for repetitive data entry tasks.				
12. The ILS must include ALA/MARC21 character set fonts.				
13. The ILS must support UNICODE.				
14. The ILS must accept, store, retrieve, print, and display diacritical marks.				
15. The ILS must support the ability for library staff to export all or part of the bibliographic database in full MARC21 format without vendor intervention.				
16. The ILS must support retention of deleted records (authority, bibliographic, item) at the library's discretion.				
17. The ILS must show statistical usage details on the bibliographic and item records.				
18. The ILS must show a preview version of the bibliographic record as it will appear in the PAC, including active urls.				
19. The ILS must provide a url checking utility.				
Z39.50				
1. The ILS must include a Z39.50 version 3 compliant catalog without additional charge.				
2. The ILS must support the ability to search a remote Z39.50 database from the Staff client, edit the record as required, and save it to the database without invoking a separate record import function.				
3. The ILS must allow Z39.50 version 3 searches of multiple databases simultaneously for a single search.				
Authority Control				
1. The ILS must support the ability for authorized staff to copy existing				

authority records from selected Z39.50 sites directly into the system.				
2. The ILS must support an import process that performs authority control on imported bibliographic records and has the ability to automatically link to a remote subscription authority database if no matching heading is found in the local database.				
3. The ILS must accommodate:				
a. personal, corporate and topical name headings in a name authority file				
b. title, uniform title and series entries in a title index				
c. subject headings in a subject authority file.				
4. The ILS must support the ability to match LC or other national standard authority records against the local file.				
5. The ILS must support the ability for automatic matching to remote authority records.				
6. The ILS must generate SEE and SEE ALSO references from authority records to direct online catalog users to other headings as follows:				
a. see references (aeroplanes to airplanes)				
b. narrower terms (automobiles to sports cars)				
c. broader terms (automobiles to motor vehicles)				
d. related terms (airplanes to flying machines)				
Label Management				
1. The ILS must offer a label manager.				
2. The label manager must support the ability to produce spine labels individually on demand or batch run, on standard (non-proprietary) printers.				
3. The label manager must support printing of labels to single sheets or to continuous form feed stock.				
4. The label manager must support labels to be printed as they are generated or print all labels generated in a single operation.				

Please highlight the Cataloging strengths your ILS has for the library, detailing added costs and/or 3rd party services:

V. Public Access Catalog Requirements	A	D	P	N
<i>Public Access Catalog (PAC) refers to an integrated subsystem that allows patrons to search and browse the bibliographic database according to library specified parameters.</i>				
General				
1. The PAC must be web accessible and support:				
a. Internet Explorer 6.x				
b. Netscape Navigator 7.x				
c. Mozilla Firefox				
d. Opera 7.0				
e. PWB 2.0				
f. Safari 1.1				
g. Other (Please list)				
2. The PAC must be fully compliant with MARC21 and Z39.50 standards.				
3. Pre-designed PAC screen themes must be readily available to easily reconfigure the look of PAC screens.				
4. The PAC must offer the ability to toggle between regular print and large print.				
5. The ILS must support the ability for the library to produce custom lists and present them on specific pages of the PAC.				
6. The ILS must support integration of 3 rd party tools that analyze web traffic.				
7. The ILS must supply a PAC that will authenticate remote patrons who use the Web to access online resources.				
8. The ILS must allow patrons to set up a user name online and change it online, if necessary. This user name can be used instead of a barcode when logging in to use PAC functions.				
9. The ILS must allow patrons to have forgotten passwords sent to their e-mail addresses.				
10. The ILS must allow the library the option to require numeric passwords (PINs) that can be used to login to the PAC or inbound phone notification system.				
11. The ILS must support the ability for the library to customize the PAC display of data, labels, and order of data elements.				
12. The ILS must support the ability of the library to disable the PAC display of an item that has gone to Lost status without deleting the item record; and allow it to be reinstated in the PAC display when the item is replaced.				
Searching				
1. The PAC must be able to search any Z39.50 compliant database or server. Please detail any costs here to develop/integrate particular targets, if applicable.				
2. The ILS must support the ability for item level detail availability to display in the PAC without leaving the results set.				
3. The PAC must offer the patron the ability to send a text message containing the item call number to his or her mobile phone, and the patron's cell phone number must be filled in automatically from the patron's account.				
4. The PAC must offer an online automatic Spell Checker.				
5. The PAC must offer a "did you mean" feature.				
6. The PAC must have the ability to enable (or disable) automatic suggestions as patrons type quick, keyword or phrase searches in the OPAC.				
7. The ILS must support the ability for the library to specify its own alternate suggestions for specified search terms instead of the program's suggestions.				
8. The PAC must save previous searches done during a single session.				

9. The PAC must offer the ability to scope searches by collection.				
10. The PAC must provide search result relevancy ranking.				
11. The PAC must support the ability to print (or export to e-mail or save to disk) a bibliography in several formats:				
a. brief bibliographic display				
b. full bibliographic display				
c. American Psychological Association (APA)				
d. Chicago Manual of Style				
e. HTML				
f. MARC				
12. The ILS must support the ability for the library to determine PAC default search settings.				
13. Browse title search results must show a summary view with different physical formats (how many books, how many DVDs, etc. for a title).				
14. The PAC must offer the ability for libraries to allow patrons to share bookmarks to titles through sites such as Facebook™, Twitter™, and Digg™.				
15. The patron must be able to link to a requested title directly from their patron account Requests list.				
16. The patron must be able to link to a title directly from their patron account Items Out list.				
17. The PAC must support the ability for patrons to save searches.				
18. Saved searches must:				
a. be able to be modified and reinitiated				
b. be able to provide automated updates of what is new since the last search and provide alerts of these new materials to patrons.				
19. The PAC must support the ability for patrons to create and save a title list.				
20. The patron must be able to add a title from the search results list directly to a saved title list or to a new title list.				
Self-Service				
1. The PAC must offer an option to allow patrons to register online for a library card.				
2. The PAC must allow authenticated patrons to:				
a. change their password				
b. submit requested address changes for review and acceptance by staff				
c. review their items out, on-hold items and outstanding fines/fees				
d. place and cancel holds				
e. save their item check-out history				
3. The ILS must support the option of allowing patrons to renew items from the PAC, even if the patron registration would expire before the item's new due date .				
4. The ILS must support the ability for the library to offer online credit card payments to patrons (for fines/fees) or guests (for donations).				
5. The PAC must offer an easy integrated purchase option to work with library affiliate vendor programs such as Amazon.com				

Please highlight the Public Access Catalog strengths your ILS has for the library, detailing added costs and/or 3rd party services:

VI. Acquisitions Requirements	A	D	P	N
General				
1. The ILS must provide a fully functional, integrated acquisitions subsystem that automatically manages encumbrances, disencumbrances, and expenditures in multiple library-defined accounts based on acquisitions activities including, but not limited to, selecting, ordering, receiving, claiming, cancelling, invoicing and reporting.				
Acquiring and Processing Materials				
1. The library must be able to pre-define URL links to web-based selection tools to support automatic launching from the acquisition client.				
2. The ILS must support electronic submission of orders to:				
a. AudioGo				
b. Baker & Taylor				
c. Book Wholesalers, Inc. (BWI)				
d. Brodart				
e. Ingram Books				
f. Library Bound				
g. Micro Marketing				
h. Midwest Tape				
i. Quality Books				
j. Rainbow Books				
k. Recorded Books				
l. S&B Books				
m. United Library Services				
n. Other (Please list)				

Please highlight the Acquisitions strengths your ILS has for the library, detailing added costs and/or 3rd party services:

VII. Serials Control Requirements	A	D	P	N
General				
1. The ILS must include the following serials control capabilities:				
a. Holdings and Publication Pattern Maintenance				
b. Check-in				
c. Claiming (including email and print claim notices)				
d. Routing				
e. Summary holdings, by copy				
f. Subscription Maintenance (including payments)				
2. The ILS must support the ability to accommodate all type of serials, including:				
a. periodicals				
b. continuations				
c. law reports				
d. newspapers				
e. annuals				
f. governmental				
g. memoirs				
h. proceedings				
i. transactions				
j. supplements				
k. indexes				
l. loose-leaf material				
3. For serials and continuations, the ILS must store data pertaining to:				
a. subscription dates (start, expiration)				
b. source				
c. frequency				
d. subscription price				
e. fund				
f. location information				
g. claiming information				
h. prediction information				
i. date of payment				
j. holdings				
k. routing information				
l. note fields				
m. active or non-active indicator				
Holdings & Publication Pattern Maintenance				
1. The ILS must support the ability to generate prediction patterns for determining when the next expected issue of a serial is scheduled to arrive.				
2. The ILS must support the ability to save patterns as templates for future use.				
3. The ILS must support regular, normalized irregular and totally irregular prediction patterns.				
4. The ILS must support the ability to predict the issue chronology and enumeration based upon a pattern entered in the control record by the operator.				
5. The ILS must support the ability to review a pattern's expected issues prior to generating them in the system.				
6. The ILS must support the ability to delete issues or parts even if they are linked to an item record.				

Check-In				
1. With each check-in, the ILS must automatically record the issue enumeration and/or chronology, date received, notes, and claim any copies expected and not received				
2. The ILS must support the ability for check-in to be performed by scanning the SICI				
3. The ILS must support the ability to record name/initials of user when item is checked in.				
4. When checking in an issue, if the received issue is not the expected issue, but does conform to the predicting pattern, the ILS must allow the user to override the predicted number.				
5. The ILS must support the ability to combine issues that arrive unexpectedly as a combined issue.				
6. The ILS must support the ability to undo check-in of issues checked in by mistake.				
7. The ILS must support the option to print labels for each issue received as needed, individually and in batch.				
8. The ILS must support the ability to print routing slips at serials check-in, individually and in batch.				
PAC Display of Serials				
1. The ILS must support the ability to suppress all issues linked to a particular Holdings Record from displaying in PAC.				
2. Retention information (e.g. last six issues retained) and concise holdings statement must display in PAC.				
3. The ILS must support the ability to automatically summarize individual issue holdings into a consolidated statement of holdings.				

Please highlight the Serials Control strengths your ILS has for the library, detailing added costs and/or 3rd party services:

VIII. Web-Based Reporting Requirements	A	D	P	N
1. The ILS must offer a separate reporting function that has a web-based graphical user interface.				
2. The web based reporting function must not be based upon 3 rd party software.				
3. The web based reporting software must allow the user to create custom reports without any knowledge of SQL or vendor intervention.				
4. This web-based reporting function must allow user to:				
a. create custom reports				
b. generate report output files in a variety of file formats including Excel, PDF, HTML and CSV				
c. save custom report parameters				
d. schedule saved reports				
e. schedule saved reports in groups				
f. execute saved reports				
g. execute saved reports in groups				
h. manage saved report parameters				
i. administer user security and various configuration options				
j. manage saved report output files				



Please highlight the Web-Based Reporting strengths your ILS has for the library, detailing added costs and/or 3rd party services:

IX. Inventory Manager Requirements	A	D	P	N
1. The ILS must provide an inventory utility that can be used on a notepad or similar device.				
2. The inventory utility must:				
a. download call number ranges of the library's collection for easy shelf comparison				
b. scan barcodes on shelves or view list of items on shelves				
c. work in offline mode when out of wireless range				
d. be able to be used as a collection weeding tool				
e. alert for items out of place or unaccounted for				
f. run reports to identify exceptions or out of place items				
g. use the Motion Tablet as an XP workstation for non-inventory times				

Please highlight the Inventory Manager strengths your ILS has for the library, detailing added costs and/or 3rd party services:

X. Mobile PAC Requirements	A	D	P	N
1. The ILS must provide a mobile PAC.				
2. The mobile PAC must be a web-based, browser-based public access library catalog that has been optimized for mobile devices:				
a. it must be device-independent				
b. it must not require an application to be downloaded and installed by the mobile device user				
c. it must be accessible by any device with a web browser, including desktop machines with standard web browsers and mobile devices with browsers optimized for mobile use				
3. If a mobile device user enters the library's main web page address, the server must determine that the request is coming from a mobile device and automatically connect to the mobile PAC interface.				
4. The mobile PAC must allow patrons to perform real-time searches via keyword.				

Please highlight the Mobile PAC strengths your ILS has for the library, detailing added costs and/or 3rd party services:

XI. Customer Support Requirements	A	D	P	N
1. State the customer support hours of operation and describe emergency procedures if the library system goes down after hours of support. (Attach separate pages if necessary)				
2. The vendor must perform preventative maintenance with daily scans of the library's servers as part of maintenance. Please describe and indicate if this is included in the basic maintenance or costs extra.				
3. The vendor will track all bug or hotline incidents reported by the library. The library will be able to view all incidents (including open and closed) via the vendor's extranet.				
4. 100% of the database schema will be available online to library customers for purposes of developing custom reports and SQL scripts. If not 100%, please describe extent.				
5. The library staff may search the vendor's knowledge base as a self-service.				
6. The full documentation will be available on-line and fully searchable by keyword.				
7. The vendor must provide an extranet for customers as part of maintenance.				
8. The extranet will allow the library to download customer developed custom reports.				
9. The extranet will allow the library to upload customer developed custom reports to share with other vendor customers.				



Please highlight the Customer Support strengths your ILS has for the library, detailing added costs and/or 3rd party services:

XII. Training Requirements	A	D	P	N
1. The vendor must provide basic training in all functioning subsystems for the independent operation of the system, including regular maintenance and troubleshooting.				
2. The vendor will provide user's training for personnel who will manage the system.				
3. Training will be planned in accordance with a mutually agreeable schedule between the library and the vendor.				
4. Library staff will be trained to manage and operate the system on a daily basis.				
5. Training will include the following:				
a. Project Implementation Visit to cover the implementation process, policy files creation, data migration issues, project planning, and staff client system administration.				
b. Application training to cover PAC, Patron Services, Cataloging, Acquisitions, Serials Control and Workflow.				
c. System Administration training to cover the System Administration Interface, ILS database structure and reports, Database maintenance, User management, Client installation and Report generation.				

Brief Vendor Comment (if necessary):

Please highlight the training strengths you feel your product has for the library, detailing added costs and/or 3rd party services:

:

Cost Proposal

Vendor is to provide both initial costs and 5-years of on-going costs for all required software, hardware, support and related services. Optional software, hardware and related services should be detailed and quoted separately. Any 3rd party services should be clearly distinguished.

STATE OF OKLAHOMA)

) SS

COUNTY OF)

_____, of lawful age, being first duly sworn, on oath says:

1. I am the duly authorized agent of _____, the contractor under the contract which is attached to this statement, for the purpose of certifying the facts pertaining to the giving of things of value to government personnel in order to procure said contract;
2. I am fully aware of the facts and circumstances surrounding the making of the contract to which this statement is attached and has been personally and directly involved in the proceedings leading to the procurement of said contract; and
3. Neither the Candidate nor anyone subject to the Candidates direction or control has paid, given or donated or agreed to pay, give or donate to any officer or employee of the State of Oklahoma any money or other thing of value, either directly or indirectly, in procuring the contract to which this statement is attached.

Print the company name

Signature

Subscribed and sworn to before me this _____ day of _____, 2011.

Notary Public

My Commission Expires: _____

(SEAL)



INTEREST AFFIDAVIT

STATE OF OKLAHOMA)

)SS.

COUNTY OF _____)

I, _____, of lawful age, being first duly sworn, on oath, state that I am the agent authorized by the seller to submit the attached Bid. Affidavit further states that no officer or employee of the City of Claremore either directly or indirectly owns a five percent (5%) interest or more in the Candidate's business or such a percentage that constitutes a controlling interest. Affidavit further states that the following officers and /or employees of the City of Claremore own an interest in the Candidate's business which is less than a controlling interest, either direct or indirect.

Print the company name

Signature

Subscribed and sworn to before me this _____ day of _____, 2011.

Notary Public

My Commission Expires:_____

(SEAL)

**Request for Taxpayer
Identification Number and Certification**

Give form to the requester. Do not send to the IRS.

Print or type
See Specific Instructions on page 2.

Name (as shown on your income tax return)	
Business name, if different from above	
Check appropriate box: <input type="checkbox"/> Individual/Sole proprietor <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ <input type="checkbox"/> Exempt payee <input type="checkbox"/> Other (see instructions) ▶	
Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
City, state, and ZIP code	
List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I Instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Social security number
OR
Employer identification number

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the Instructions on page 4.

Sign Here

Signature of U.S. person ▶

Date ▶

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,



In an effort to better reach all prospective vendors, please assist us by providing and returning, with your bid/proposal, the following information:

How did you learn about this request for proposal? Please check all that apply:

_____ Legal notice in the Claremore Daily Progress

_____ City of Claremore internet web site

_____ Advertisement on Claremore cable TV. (CCTV-Channel 17)

_____ Posting on city hall bulletin board

_____ Subscription to a construction reporting service if

_____ City sent the bids to my firm

_____ Other, please identify _____

Thank you for your assistance!

OKLAHOMA TAX COMMISSION



November 3, 2003

TAXPAYER ASSISTANCE DIVISION
Larry Wilson, Director

City of Claremore TPA
PO Box 249
Claremore OK 74017

FEI 736005143

Dear Sir/Madam:

This is in response to your request for verification of the sales tax exemption for purchases made by the City of Claremore, Claremore, Oklahoma. This entity of government is exempt from payment of state/local sales tax pursuant to Title 68 O.S. 2002 Supp., Section 1356(1) which we quote in part:

There are hereby specifically exempted from the tax levied by this article:

* * *

(1) Sale of tangible personal property or services to the United States government or to the State of Oklahoma, any political subdivision of this state or any agency of a political subdivision of this state;

Pursuant to 68 O.S. Section 1404, any purchase exempt from sales tax is also exempt from use tax.

Because we do not issue "sales tax permits" to government entities that are exempt by statute, you may provide vendors with a copy of this letter for documentation concerning your sales tax exemption. Expenses, including travel, incurred on a reimbursable basis are not sales tax exempt.

This exemption does not expire, but the response contained in this letter applies only so long as you maintain the status set out in your application of October 31, 2003. Any change in your status may invalidate this letter. This letter may not be used to establish sales/use tax exemption status by any entity other than the addressee.

If we can be of further assistance, please feel free to contact us at (405) 521-3160.

Sincerely,

OKLAHOMA TAX COMMISSION

Jerry Kirton, Administrator
Taxpayer Assistance Division

JK:sf

2501 NORTH LINCOLN BOULEVARD • OKLAHOMA CITY • OKLAHOMA 73194

IT IS OUR MISSION TO SERVE THE PEOPLE OF OKLAHOMA BY PROMOTING TAX COMPLIANCE THROUGH QUALITY SERVICE AND FAIR ADMINISTRATION