**EVANSVILLE
VANDERBURGH
PUBLIC LIBRARY**

REQUEST FOR PROPOSAL

ILS (Integrated Library System) Replacement

ISSUED April 4th, 2022

DEADLINE – 5:00 PM
May 4, 2022

CONTACT:
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IT MANAGER
200 SE M.L. KING JR. BLVD.
EVANSVILLE, IN   47713
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EVANSVILLE VANDERBURGH PUBLIC LIBRARY

REQUEST FOR PROPOSAL
ILS (Integrated Library System) Replacement

April 4, 2022

The Evansville Vanderburgh Public Library is seeking proposals to replace the Sierra ILS for the Evansville Vanderburgh Public Library system. This Request for Proposal (RFP) provides a set of specifications by which each vendor's proposal will be measured.

Below are instructions for submitting a response to this proposal and detailed functionality requirements.

The Evansville Vanderburgh Public Library is committed to an objective and open selection process. Every proposal shall receive an unbiased review.

Questions concerning the RFP and scope of work should be directed to:

Brett Schelhorn, IT Manager
200 SE M.L. King Jr. Blvd.
Evansville, IN 47713
Telephone: (812) 428-8200 x1400
Email: bretts@evpl.org
Website: https://www.evpl.org

Table of Contents

SECTION 1
GENERAL INSTRUCTIONS

1.1   FORMAT FOR PROPOSALS

The proposal should follow the pricing section of this RFP and address the desired scope of work. Failure to submit **all** of the required information may result in disqualification. All blanks on the proposal form must be completely filled.

1.2   DIRECTIONS FOR SUBMITTAL

Vendors should email the proposal to Brett Schelhorn, IT manager at bretts@evpl.org by 3:00 PM on, May 4, 2022. Email subject line should have "ILS (Integrated Library System) Replacement". Proposals shall be valid for ninety (90) days.

Proposals arriving after the specified time will not be accepted.

1.3   PROPOSAL AS PART OF CONTRACT

It is intended the specifications and terms in this proposal shall become part of a Purchase Order with the successful vendor.

1.4   OWNERSHIP OF PROPOSAL MATERIALS

All materials, including but not limited to paper and digital materials, that are prepared, acquired, created, or utilized to fulfill this Request for Proposal and its objectives shall become the property of the Evansville Vanderburgh Public Library where allowed by law.

1.5   WITHDRAWALS; DECLINATIONS

An email request for the withdrawal of a proposal may be granted if the request is received by the IT Manager prior to the specified date and time of receipt deadline. After the receipt deadline, the vendor cannot withdraw or cancel its proposal for a period of ninety (90) calendar days, and such proposal will be binding during that time. Proposals that have clerical errors or any irregularity are subject to correction only with concurrence of the IT Manager.

1.6   PROPOSAL RECEIPT

Proposals received at the office designated in the solicitation after the exact hour and date as

specified for receipt **will not** be considered.

1.7   COMPETENCY OF VENDORS

The Evansville Vanderburgh Public Library reserves the right to independently determine the competence, financial and operational capacity of any vendor. All vendors shall cooperate with the EVPL to determine competency.

1.8   REJECTION; WAIVERS

The Evansville Vanderburgh Public Library reserves the right severally or together to reject any and all submittals, waive any irregularities, reissue all or part of this Request for Proposal, and not award any contract, all at its discretion and without penalty.

1.9   INVESTIGATION BY VENDOR

It shall be the responsibility of the vendor to thoroughly read and understand the information, instructions, and specifications herein.

Vendors are responsible to completely inform themselves of all the conditions under which work is to be performed. This includes an examination of any bandwidth requirements, network security, firewall restrictions, import and conversion of data and all other factors, which would affect the execution and completion of work covered by this proposal.

1.10   AWARD OF CONTRACT

The Evansville Vanderburgh Public Library is committed to an objective and open selection process. Every proposal shall receive an unbiased review. The evaluation criteria include but are not limited to:

- Compliance with system specifications
- Compliance with functionality questionnaire
- Vendor's service and delivery capabilities/history
- Vendor's viability and financial strength
- Ease of use and functionality for customer
- Frequency of new enhancements
- Experience with libraries with comparable systems
- Pricing, including migration fees from current system, annual maintenance fees, additional staffing requirements, ease of administration support
- Reference checks

The EVPL will consider a number of factors when deciding upon a vendor. While price will be a contributing factor, EVPL will not compromise quality of work, variety of services performed, professionalism, or ethical considerations when making its decision. The EVPL reserves the

right to base its decision on any factors it deems pertinent, or assigning greater weight to those factors it so chooses.

This solicitation does not commit the EVPL to make an award if all proposals received are determined to be unacceptable or not in the best interest of the EVPL to make an award. EVPL reserves the right to reject any or all proposals and to waive informalities and minor irregularities in proposals received.

A written award (or acceptance offer) will be furnished in the form of a Purchase Order to the successful vendor. The term of the contract will be for three years.

One or more sessions may be requested for additional information and or interviews may be required with any vendor submitting a responsive proposal.

1.11   PRE-CONTRACTUAL EXPENSES

EVPL shall not, in any event, be liable for any pre-contractual expenses incurred by the vendors in the preparation of their proposals, for responding to this RFP, or for any costs associated with discussions required for clarification of items related to this proposal, including any future interviews. Vendors shall not include any such expenses as part of their proposals.

Pre-contractual expenses are defined as expenses incurred by the proposed in:

- preparing its proposal in response to this RFP;
- submitting that proposal to the EVPL;
- negotiating with the EVPL any matter related to this proposal;
- any other expenses incurred by the proposer prior to the date of award of the Proposer's Agreement

A vendor may not classify any information pertaining to contract terms, experience, proposed products or proposed pricing as proprietary information. All information and material returned with each proposal shall become part of any contract, which results from this proposal, and will become a public record.

1.12   QUESTIONS TO THE EVPL PRIOR TO DUE DATE

Companies wishing to have questions and/or clarifications answered regarding this Request for Proposal must submit via email to Brett Schelhorn at bretts@evpl.org, no later than April 25, 2022. Questions will be reviewed by EVPL evaluators and if deemed relevant to the respondents, will be answered via addendum to all recipients of this Request for Proposal.

1.13   AMENDMENTS

It is recognized that subsequent written amendments to the awarded contract may be

necessary; and all such amendments will require the mutual agreement of the parties.

1.14 AMENDMENTS TO THE REQUEST FOR PROPOSAL

Amendments to this Request for Proposal may be necessary prior to the closing date, and will be furnished in the form of written addends by email to all prospective vendors. Oral communications with any person(s) will not be construed as providing amending data to the specifications, unless converted to the form of written addends and conveyed to all prospective vendors.

SECTION 2
CONTRACT SPECIFICATIONS

2.1 SCOPE OF WORK

Replace the existing Sierra ILS and maintain all functionality that currently exist in the ILS. Maintain all functionality with all thrid party vendors that EVPL uses. Provide a staff interface that is modern and intuitive. Provide an Online Catalog that is mobile responsive and allows for personalized content. Must have a web based staff interface that includes all functionaility. Must train staff on all functions.

1. System capacity requirements

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

Bibliographic Records	1,856,142 titles
Items (copies, volumes)	2,247,353 volumes
Authority Records	577,846 records
Patron Records	105,772 records
Annual Circulation	881,644 checkouts
Serial subscriptions	247 subscriptions
Total number of simultaneous staff users	210 users
Total number of simultaneous OPAC users	unlimited users
Total number of simultaneous Web users for ILS Client	210 users

FUNCTIONALITY QUESTIONNAIRE on page 8 has the rest of the Scope information

2.2	GENERAL PROJECT DESCRIPTION

The Evansville Vanderburgh Public Library (EVPL) seeks the services of a vendor to replace the existing Sierra ILS. The Sierra ILS has been installed since 2013 and is now hosted by Innovative. Before that Millennium was the installed ILS software in 2000. Before that, the text based Innopac system was installed in 1994.

The selected vendor will work with various stakeholders, including but not limited to the IT team, the Administrative team, Circulation and the Cataloging team.

This Request for Proposals (RFP) provides a set of specifications by which each vendor's proposal will be measured. EVPL is committed to an objective and open selection process. Every proposal shall receive an unbiased review. This RFP has been issued to ensure competitive pricing, services, and/or work.

2.3	COMMUNITY AND LIBRARY BACKGROUND

Evansville, Indiana is located in the southwest corner of Indiana, and of contemporary significance is the largest city in the Tristate region as well as the third largest city in Indiana. Evansville is 119 miles west of Louisville, Kentucky and is 151 miles north of Nashville, Tennessee.

Census data for 2020 puts the Vanderburgh County population at 180,136. The Evansville Vanderburgh Public Library serves all city and county residents.

The Evansville Vanderburgh Public Library currently consists of 9 facilities – 8 library locations and an annex building that houses the EVPL wellness clinic, meeting space, and provides rental space to other community organizations. The library website allows users 24/7 access.

Mission: We cultivate curiosity by creating wonder.

Vision: Communities united through shared exploration and understanding.

2.4	TAXES, LICENSES, PERMITS AND CERTIFICATES

The vendor shall pay all sales, use, property, income and other taxes that are lawfully assessed against the EVPL or the vendor in connection with the vendor's facilities and the work included in this contract.

Immediately upon the awarding of the contract, the vendor shall secure and pay for, at its own expense, all necessary licenses, and certificates of authority required to complete the work, and shall comply with all requirements of such permits, licenses, and certificates of authority to operate in the EVPL. The vendor shall keep and maintain all such licenses, permits and

certificates of authority in full force and effect throughout the term of the contract.

EVPL is tax-exempt from the provision of the Indiana Sales and/or Use Tax on software and equipment under this solicitation. Exemption certifications will be furnished to cover tax exemption where applicable and when requested by the vendor.

2.5   COMPLIANCE WITH APPLICABLE LAWS

The vendor shall comply with all applicable Federal, State, and local laws, ordinances, rules and regulations governing construction during the term of this contract.

During the term of this contract, the vendor shall comply in all respects with the Equal Employment Opportunity Act and the Americans with Disabilities Act. Findings of noncompliance with applicable State or Federal equal employment opportunity laws and regulations may be sufficient reason for revocation or cancellation of this contract.

SECTION 3
REQUIREMENTS FOR CONSIDERATION

3.1   AVAILABILITY

Targeted commencement to replace the ILS is immediately following the awarding of contract is January 3, 2023. Please include a proposed duration and timeframe to complete this project in accordance with vendors scheduling availability. Targeted completion is June 3, 2023.

3.2   PRICING

Pricing shall include all training, installation, licenses, hosting fees and equipment required to complete the following project scope at EVPL.

Assumptions:
- Any work that requires downtime of the ILS will be done when EVPL is closed

Pricing should exclude sales tax; Evansville Vanderburgh Public Library is a tax-exempt organization. Sales tax exemption certificate available upon request.

3.3   BILLING AND REPORTS

Billing and payment procedures should be described in detail, including frequency and means of billing. All invoices received by the first Friday of the month, will be included in our monthly payment cycle, which is mailed out the second Thursday of the month. Only work completed

and quoted in awarded contract shall be eligible for payment.

3.4   PROPOSAL REQUIREMENTS

It is the purpose of the RFP to obtain as complete data as possible from each bidder to enable EVPL to determine which vendor is best able to satisfy all the criteria, which are to be considered in the award of this contract. To this end, each vendor shall furnish as part of their proposal a complete general description of its capabilities as described in "Requirements for Consideration". Each of the following must also be included with vendor's proposal:

1.   The return of this complete RFP signed and completed as required.

2.   Complete name and address of company or individual.

3.   Description of the Prospective vendor, its size, number of employees to include:
    a.   A brief history of the Prospective vendor emphasizing its work.

    b.   At least three (3) customer references including the name, address, contact person, email address and telephone number.

    c.   Provide the name, title and contact information of an authorized individual who is empowered to enter into negotiations and who can execute a contract on behalf of the company or individual.

    d.   Any other information, which the Prospective Vendor believes the EVPL should consider in evaluating the proposal, including terms and conditions.

    e.   The duration and extent of experience to determine the ability of the company or individual to achieve the needs of the EVPL to be explained in detail.

    f.   List of any, all work to be subcontracted and the subcontractor, or a list of potential subcontractors.

    g.   A weekly timeline for schedule of implementation

3.5   AFFIRMATIVE ACTION POLICY

It is the policy of the EVPL to be in full compliance with all federal and state non-discrimination and equal opportunity laws, orders and regulations relating to race, sex, religion, disability, age, national origin, or status as disabled veterans. All persons or entities making proposals must also be in full compliance with these laws, orders, and regulations.

Any successful vendor shall submit written assurances upon request that the vendor will provide equal opportunities to qualified minority individuals, to Minority Business Enterprises

(MBE), to Women Business Enterprises (WBE), and to Disadvantaged Business Enterprises (DBE).

FUNCTIONALITY QUESTIONNAIRE

Instructions

a)   The vendor must have the function installed and in live operation at libraries in General Release that have purchased the function and are utilizing that function in order to respond AVAILABLE. The vendor may be asked to provide references to verify any requirement.

b)   Any answer other than AVAILABLE shall be evaluated as NOT AVAILABLE. However, the Library will consider notes, as well as the timing of the release date and assign partial scoring. The following compliance statements should be used:
A = AVAILABLE: Functions available in the General Release of the product
N = NOT AVAILABLE: The function is not available currently

General Specifications

	A	N
1. The system proposed must be a cloud-hosted solution, including full system management services and ongoing upgrades and support for the application, operating system, any required database management and necessary utilities.		
Vendor Comment:		
2. The system must be proposed with software to support the following functions: • Cataloging and Authority Control, including cataloging utility interface • Circulation and Media Scheduling • Acquisitions and Fund Accounting, with EDI support • Serials Control, including Binding and Routing • An integrated Electronic Resources Management system (ERM) • Mobile application for library staff • Fully functioning Patron Mobile App with self-check and shared patron library cards • Report Writer using Boolean operators		
Vendor Comment:		
3. The server must be sized with sufficient capacity to allow for the growth without requiring higher hosting costs.		
Vendor Comment:		

4. The server should have redundancy at multiple hosting sites in different geographic areas of the United States		
Vendor Comment:		
5. The vendor must provide a single point of support for the entire system. If the library encounters a problem with the central site hardware or software, they must be able to contact the vendor 24 hours a day, 365 days a year, via a toll-free telephone number or website with a ticket system to report the problem. Please detail any exceptions to this point.		
Vendor Comment:		
6. The system proposed should require minimal ongoing administration and maintenance. All regular system administration functions must be performed from within the application and should not require access to the operating system.		
Vendor Comment:		
7. All updates and indexing transactions must be performed in real-time, without the need for any batch or "cron" jobs to be run.		
Vendor Comment:		
8. Any system client must support platform independence for all staff and Discovery/OPAC functions. All of the modules must be capable of running on current versions of Windows and Mac OS workstations.		
Vendor Comment:		
9. A Web-based staff interface is preferred.		
Vendor Comment:		
10. The Discovery/OPAC module must be accessible via standard web browsers (i.e. Chrome, Firefox, Edge.)		
Vendor Comment:		
11. The look and feel of the software should be customizable, such as colors, fonts, font sizes, sounds, window sizes, etc.		
Vendor Comment:		
12. Both keyboard and mouse navigation of the various menus and functions		
Vendor Comment:		
13. The client and user-chosen preferences, such as macros, screen color, fonts, icons, sounds, etc, shall be associated with the user and not the workstation. Specifically, all user preferences and privileges will be based upon user identity and shall follow that user from workstation to workstation.		
Vendor Comment:		

14. The system must permit an authorized user to view and edit any record type for which they have passworded permission regardless of the module being used (e.g., serials check-in records from within the Acquisitions module, bibliographic records from the Circulation Control module, and order records from the Cataloging module). Please state any limitations on such access in detail.		
Vendor Comment:		
15. The vendor must describe its maintenance support services, detailing how both hardware and software support services will be provided.		
Vendor Comment:		
16. The system must be able to operate 24 hours a day, 7 days a week, 365 days a year except for planned downtime for system upgrades. The system must be available for staff and patron use while backup procedures are being performed.		
Vendor Comment:		
17. Vendor should guarantee up time of 99.99% or greater.		
Vendor Comment:		
18. Software updates must be performed as a part of the hosting service. Please describe how major software updates are performed.		
Vendor Comment:		
19. The library must be able to determine whether to implement a new release and to determine when the upgrade will occur. It must be possible to skip upgrading to a new release and wait for the next one if this is desired by the library.		
Vendor Comment:		
20. If a third-party relational database management system (RDBMS) is required, the vendor must propose a full-use license, allowing read and write access to the RDBMS as well as a published data-dictionary.		
Vendor Comment:		
21. The proposed database solution must be fully UNICODE compliant.		
Vendor Comment:		
22. The Vendor must certify that all library data will remain the property of EVPL and that EVPL can, at any time, extract any or all data without requiring vendor permission or assistance.		
Vendor Comment:		

Vendor information

Company Profile

1. Concisely describe the company, including its history, origin, and any affiliation to other corporate entities. If the company is currently for sale or involved in any transactions to expand or to be acquired by another organization, please explain.
Vendor comment:
2. Describe the company's involvement with library-related organizations and standards organizations.
Vendor comment:
3. Describe the company's strategy for keeping up with industry trends and developments in library software and systems.
Vendor comment:
4. Describe the procedure for developing new features, including how customer input is taken, evaluated, and weighed.
Vendor comment:

Strategic Partnerships

1. List any partnerships with third-party Vendors, including a brief description of the services they provide.
Vendor comment:
2. Describe any partnerships with public libraries for developing new products or testing software.
Vendor comment:

Financial Data

1. Please provide financial information sufficient to indicate the vendor's financial stability.
Vendor comment:

User Groups

1. Provide contact information for users groups, including website or other online support resources.
Vendor comment:

References

		A	N

1. Provide a list of no more than three public libraries using the latest or next to latest release of software for their OPAC, acquisitions, cataloging, serials, circulation, and discovery services platform include the client name, job title, email address and the name and phone number of the individual the library has your permission to contact.

Vendor comment:

DISOCVERY SERVICES PLATFORM

	A	N
1. The Discovery Platform must provide a single grouping view for multiple formats of the same resource.		
Vendor comment:		
2. The Discovery Platform indexes must include real-time update or local data from the ILS. New items added in the LMS must appear in Discovery results immediately and not rely on periodic batch loads or 24-hour delays.		
Vendor comment:		
3. The Discovery Platform must display real-time location and status information for physical items in the initial search results set.		
Vendor comment:		
4. The Discovery Platform must use native BIBFRAME for enhanced results.		
Vendor comment:		
5. The Discovery Platform must support OAI-PMH harvesting of other local resources for inclusion in discovery searches (institutional repositories, archives systems or other resources in use locally or by partner institutions).		
Vendor comment:		
6. The Discovery Platform must offer a multilingual user interface and allow users to choose from available languages. Specify languages supported.		
Vendor comment:		
7. The Discovery Platform must have a published VPAT showing compliance with accessibility standards.		
Vendor comment:		
8. The Discovery Platform must include facets to allow users to restrict results sets. Facets must include location and availability to allow users to restrict results to available items at their current location.		
Vendor comment:		
9. The Discovery Platform must provide "Did you mean" guidance to suggest alternate search terms to users based on local library data and indexes and not on a generic dictionary.		
Vendor comment:		

10. The Discovery Platform must include enhanced content including AR and Lexile levels.		
Vendor comment:		
11. The Discovery Platform must de-duplicate search results.		
Vendor comment:		
12. The Discovery Platform must provide the option sort results by a variety of criteria, including relevance and publication date.		
Vendor comment:		
13. The Discovery Platform must provide Roll-Up of different formats for the same title into a single view for all formats, publish dates and locations available.		
Vendor comment:		
14. The Discovery Platform should display, as a minimum, book cover images in the search results. Please specify what other content is available for inclusion in the catalog.		
Vendor comment:		
15. The Discovery Platform must not require login to perform standard catalog searches.		
Vendor comment:		
16. The Discovery Platform must allow patron self-service functions for authenticated users, including placing holds on library materials, as well as requesting/checking-out digital materials from outside vendors such as Overdrive, Hoopla, Kanopy, etc.		
Vendor comment:		
17. The Discovery Platform patron authentication must allow simple patron barcode and PIN.		
18. The Discovery Platform patron authentication must allow simple patron username and password.		
Vendor comment:		
19. The Discovery Platform should be enabled to use Linked Data or BibFrame format.		
Vendor comment:		
20. The Discovery Platform must allow authenticated users to see all of their account information (loans, requests, fines, saved searches, etc.) and edit selected fields (address, telephone #, email, notice preference, etc.) within the discovery interface. Patrons must also be able to renew books, suspend or cancel holds, pay fees and manage personal lists directly within the discovery interface. Please describe how this will be delivered.		
Vendor comment:		
21. The Discovery Platform must be supported in all current major browser environments. Please specify supported browsers.		
Vendor comment:		
22. The Discovery solution must include a responsive interface supported on smartphones and tablets.		
Vendor comment:		

ILS FUNCTIONAL SPECIFICATIONS

Circulation

	A	N
1. The system must allow checkout, checkin, renewal and holds/requests		
Vendor comment:		
2. The system must allow authorized staff to modify the system-calculated due date at checkout		
Vendor comment:		
3. The system must allow renewal of individual items or all items in a single transaction		
Vendor comment:		
4. The system must generate checkout receipts showing items checked out and due dates in print, email, and SMS text message		
Vendor comment:		
5. The system must generate checkin receipts (proof of return)		
Vendor comment:		
6. The system must generate fine payment receipts in print, email, and SMS text message		
Vendor comment:		
7. The system must allow the placement of holds for a specific item or for the first available item.		
Vendor comment:		
8. The system must allow holds to be placed by staff (for the patron) or by the patron directly through the Discovery interface.		
Vendor comment:		
9. The system must allow temporary suspension of a hold request (vacation freeze) while maintaining the patron's position in the hold queue.		
Vendor comment:		
10. The system must allow the pickup location to be specified from a library-defined list when a hold is placed		
Vendor comment:		
11. The system must allow authorized staff to re-order the sequence of the hold queue or to move a hold queue to a different item		
Vendor comment:		
12. The system must allow paging of on-shelf items to allow users to request items from remote locations or from special collections or other closed-stack areas.		

Vendor comment:		
13. The system must provide automatic routing of items to the designated pickup location where necessary, assigning transit statuses and printing transit slips to accompany the item		
Vendor comment:		
14. The system must allow manual entry of data in patron records for recording patron details.		
Vendor comment:		
15. The system must allow the taking of patron photos that can be included in the patron record data.		
Vendor comment:		
16. The system must allow for the exporting of the patron photo		
Vendor comment:		
17. The system must provide APIs to enable real-time update of patron information.		
Vendor comment:		
18. The system must provide flexible circulation parameters that can be configured by the library staff to support different policies in each library branch or circulation location		
Vendor comment:		
19. The system must allow circulation policies to be set within the staff interface or other graphical user interface provided for this purpose		
Vendor comment:		
20. The system must be able to support variations in circulation policies from site to site, including library hours, loan periods, fine rates and blocking thresholds		
Vendor comment:		
21. The system must support the local definition of patron types and item types and allow circulation policies to be defined for different combinations of patron and item types for each location		
Vendor comment:		
22. The system must support multi-site operations by managing transfer of materials to meet demand, either as individual item requests 'in transit' or as bulk item transfers.		
Vendor comment:		
23. The system must generate automatic notices that can be scheduled, including pre-overdue (warning), overdue, recall, hold availability, billing notices at a minimum.		
Vendor comment:		

24. The system must allow notices to be generated in print, email or SMS text message formats according to patron-specified communication preferences.		
Vendor comment:		
25. The system must apply blocks to patron accounts based on library-defined blocking thresholds including, the number of items checked out, the number of items of a particular type checked out (e.g. DVDs), request limits, fines owed. Please list available system-generated blocks.		
Vendor comment:		
26. The system must remove system-assigned blocks automatically once the reason for a block has been resolved.		
Vendor comment:		
27. The system must allow library staff to assign locally defined blocks.		
Vendor comment:		
28. The system must allow patrons to self-renew		
Vendor comment:		
29. The system must consider blocks and other exception conditions during renewal		
Vendor comment:		
30. The system must calculate fines and fees for an item based on library-defined fine rates that can be uniquely set for any location/item type/patron type combination		
Vendor comment:		
31. The system must allow charging of lost item fees that are automatically applied after an item is overdue for a library-defined period of time.		
Vendor comment:		
32. Replacement fees charged should be based on the item price or a library-defined default when item records do not have a price.		
Vendor comment:		
33. The system must allow the definition of handling/service charges for lost items that are automatically added to the item replacement cost when lost item fees are assessed by the system.		
Vendor comment:		
34. The system must allow authorized staff to add or waive a fine or fee.		
Vendor comment:		

35. The system must manage fine payments, allowing partial payment or full payment of any selected item(s) as well as partial or full payment of the total fines owed.		
Vendor comment:		
36. The system must allow for patron to pay fines online using mobile responsive website that is PCI compliant		
Vendor comment:		
37. The system must maintain a payment history in the patron record, detailing all fines paid and waived		
Vendor comment:		
38. The system must be able to create a report for extremely long overdue items, based on the number of days overdue and the patron's current balance of amount owed, and which can export selected patron, item and financial information to automatically send to a Collections Agency. Upon creation of this report, an automatic block will be placed on the patron's record and the block removed when a new report shows the patron's balance has been reduced to a specified amount. Please list any Collections Agencies your system works with currently.		
Vendor comment:		
39. The system should allow staff to collect In House Use counts for items used within, but not checked out, the library.		
Vendor comment:		
40. The system must allow the assignment of a 'claims returned' status to retain the link to the item in the patron record but suppress the generation of notices and fines.		
Vendor comment:		
41. The system must alert staff of 'claims returned' or 'lost' items on checkout, checkin and inventory.		
Vendor comment:		
42. The system must automatically generate a hold availability notice to patrons when requested items are available. Preferably, this will be generated in real time.		
Vendor comment:		
43. The system must support SIP2 and/or NCIP to allow connection to self-service machines, sortation systems and other third-party solutions supporting these standards.		
Vendor comment:		
44. The system must support SIP2 checkouts, checkins, renewals and status queries at a minimum		
Vendor comment:		

	A	N
45. The system should include SIP2 licenses without extra fees per license		
Vendor comment:		
46. The system must include a back-up circulation function for use when a connection to the server is not available		
Vendor comment:		
47. The system must support the Envisionware AMH system		
Vendor comment:		
48. The system must support the Envisionware self-check system and other vendors self-check systems		
Vendor comment:		
49. The system must support the Envisionware RFID gates		
Vendor comment:		
50. The system should display authority records from circulation		
Vendor comment:		
51. The system should maintain and display all circulation history for staff use		
Vendor comment:		

Systems Administration & Reports

	A	N
1. Provide an overview of the capabilities for configuring and customizing the system that can be performed without Vendor assistance.		
Vendor comment:		
2. It should be possible to print to email, attached or network printers		
Vendor comment:		
3. Indexes, including Discovery indexes, should be updated in real-time. Specify any indexes which are not updated in real-time or which are updated through batch processing or job scheduling.		
Vendor comment:		
4. Describe capabilities to extract data from the system, manipulate it, and reload it, or export to external sources.		
Vendor comment:		
5. Describe mechanism used for periodic database reorganization or re-indexing, and describe any significant loss of functionality during these processes.		
Vendor comment:		
6. Provide an overview of the reporting capabilities, including a list of the standard reports and/or available templates.		
Vendor comment:		

7. Describe capabilities for scheduling and running on-demand standard and custom reports, and specify the impact of running reports upon system performance.		
Vendor comment:		
8. Describe staffing requirements and any technical expertise required to support the generation of reports.		
Vendor comment:		
9. Describe capabilities to control access and authorization levels for running reports.		
Vendor comment:		
10. The system must provide browser-based management reports, which record transaction information, such as patron searches, circulation statistics, etc. Please describe the browser-based management reports available on the system.		
Vendor comment:		
11. The system must provide browser-based management reports that can be scheduled		
Vendor comment:		
12. The proposed system must include collection development reports, which will compile data from acquisitions, circulation and cataloguing to provide a cost per item catalogued, and cost per item circulated according to library-defined categories.		
Vendor comment:		
13. It is strongly desired that statistical reports be exportable in formats usable by third-party spreadsheet software, e.g. Excel, for manipulation and formatting.		
Vendor comment:		
14. Describe capabilities for producing custom reports. List any third-party software packages required or recommended for custom reports.		
Vendor comment:		
15. Access to custom reports should be integrated throughout the application so that custom reports can be used as input files in other application functions, such as batch updating, statistical analysis, and new acquisitions lists.		
Vendor comment:		
16. Describe capabilities for producing custom receipts, slips, labels and notices. List any third-party software packages required or recommended for custom output.		
Vendor comment:		

	A	N
17. Direct SQL access to the database should be provided with documentation or structured database views available to facilitate access.		
Vendor comment:		
18. Must be able to produce flexible statistical reports capable of using multiple points of data including, but not limited to, item type, item locations, call numbers (both Dewey and non-Dewey types), patron types, age ranges, home library, checkout/in locations, number of checkout/renewals, holds placed/filled, and in-house use counts. Reports should be available for hourly, daily, weekly, yearly, and user specified date ranges.		
Vendor comment:		
19. Must be able to schedule statistical reports that can be exported and emailed		
Vendor comment:		
20. The system should have a granulated system of assigning staff permissions and authorizations for access to individual modules (circulation, cataloging, serials, etc.) as well as the various functions within them. There should also be permissions so that selected staff can override blocks and limits put in place by the system rules.		
Vendor comment:		

Metadata Management and Authority Control

	A	N
1. The system must support full MARC21 bibliographic, authority and holdings records		
Vendor comment:		
2. The system must support new fields and subfields added to MARC to support RDA.		
Vendor comment:		
3. The system must support non-MARC metadata including Dublin Core and EAD		
Vendor comment:		
4. The system must support Unicode		
Vendor comment:		

5. Describe current support for Linked Data, BibFrame and Semantic Web technologies and plans for future development in these areas		
Vendor comment:		
6. The system must support the import of records individually or in bulk in all supported formats.		
Vendor comment:		
7. The system should support export of records individually or in bulk in all supported formats.		
Vendor comment:		
8. The system must support multiple call number schemas, including LC, Dewey and locally defined		
Vendor comment:		
9. The system must not impose any limits on record, field or subfield size, or the number of fields in a record beyond those imposed by the MARC format		
10. The system must provide flexible user-modifiable data entry templates		
Vendor comment:		
11. The system must provide MARC cataloging templates showing MARC fields and indicators as well as a plain-text labelled editor		
Vendor comment:		
12. The system must validate MARC records and provide warnings of any problems detected in real time to allow immediate correction of the problem		
Vendor comment:		
13. The system must validate ISBN-10, ISBN-13 and ISSN references.		
Vendor comment:		
14. The system must provide context-sensitive MARC cataloging help in the editor.		
Vendor comment:		

15. The system must provide library-customizable validation rules to allow local definition of required fields and subfields and content validation		
Vendor comment:		
16. The system must support entry of URLs, URNs and other URIs in bibliographic records for electronic location and access information		
Vendor comment:		
17. The system must allow unique item identifiers to be assigned to item records on the system		
Vendor comment:		
18. The system must support both barcodes and RFID tags as item identifiers		
Vendor comment:		
19. The system must support Envisionware RFID tags in the Danish data format		
Vendor comment:		
20. The system must provide duplicate checking and notify the cataloguer when a record being edited or saved matches an existing record in the database		
Vendor comment:		
21. The system must allow catalogers to save drafts of records without making these records accessible in the catalog (separate workspace or record suppression)		
Vendor comment:		
22. The system must allow global and bulk modification of records of all types.		
Vendor comment:		
23. It must be possible to identify a set of records to modify using search queries (including complex Boolean queries) and use the result list as a target for a global change operation		
Vendor comment:		

24. It must be possible to use multiple criteria for identifying sets of records for global changes, including content within the record, presence or absence of attached records, or content within attached records to perform bulk change operations (e.g. identifying items to be moved to an off-site storage facility based on acquisition date, material format and circulation count).		
Vendor comment:		
25. The system must allow authorized staff to move holdings and item records from one bibliographic record to another while retaining all associated links (holds, circulations, orders)		
Vendor comment:		
26. The system must provide access to a global, shared authority resource to allow direct download of LC MARC authority data without requiring a separate agreement between the library and the metadata provider		
Vendor comment:		
27. The system must support subject, name and uniform title authorities		
Vendor comment:		
28. The system must allow the loading of MARC authority records as well as allowing the local creation and editing of authority records		
Vendor comment:		
29. When a heading changes in a local or global authority record as the result of local editing or batch update, the system must automatically change the heading in every bibliographic record in which the heading occurs		
Vendor comment:		
30. The system must allow the creation and editing of holdings records for both physical and electronic resources.		
Vendor comment:		
31. The system must allow for the creation and editing of item records for physical collection management		
Vendor comment:		

32. There must be no limit to the number of item records linked to a bibliographic record.		
Vendor comment:		
33. The system should give a warning if the last copy is being deleted.		
Vendor comment:		
34. It must not be possible to delete a bibliographic record if it still has an item record attached.		
Vendor comment:		
35. It must not be possible to delete an item record if it is in circulation or if there is an outstanding obligation on the item (e.g. fines owed, holds)		
Vendor comment:		
36. It must be possible to assign a new item identifier (barcode/RFID) to an item without having to manually transfer transaction data to a new item record.		
Vendor comment:		
37. The system must provide a Z39.50 search capability in the staff interface to allow catalogers to search external databases and import records directly to the catalog.		
Vendor comment:		
38. When importing a record or set of records, it must be possible to determine duplicate handling with the following options: • Add new records, ignore duplicates • Overlay the existing record with the new record • Do not load duplicate records		
Vendor comment:		
39. The system must provide an inventory control facility, allowing the use of portable devices to store and upload item identifiers (e.g. barcodes, RFID tags), and report inconsistencies. This function should allow wireless connectivity to allow interactive inventory tasks to occur within the stacks shelf-by-shelf, not as a batch upload/printed report activity		
Vendor comment:		

Acquisitions

	A	N
1. The system must support fully integrated acquisitions process for all types of materials, including e-resources.		
Vendor comment:		
2. The system must provide integrated financial management functions		
Vendor comment:		
3. The system must allow bulk loading of records for purchase consideration and support selector review and selection for purchase		
Vendor comment:		
4. The system must support management of trials to evaluate e-resources before purchasing.		
Vendor comment:		
5. For subscriptions (print or e-resource), the system must alert library staff when the subscription is nearing renewal. The alerts must be triggered at a library-defined interval prior to subscription expiration.		
Vendor comment:		
6. The system should be able to provide cost per use analysis for both print and e-resources to inform staff renewal decisions		
Vendor comment:		
7. The system must support ingest of COUNTER statistics from e-resource providers via SUSHI. Please describe how the system harvests the usage information.		
Vendor comment:		
8. The system must support purchasing workflows for all types of orders, including firm orders, subscriptions, standing orders, gifts, donations and others.		
Vendor comment:		

9. The system must integrate with the institution's accounting system to transfer financial data. Please describe options for batch transfer of data (csv) or API transfer in real time.		
Vendor comment:		
10. The system must include an EDI interface with major library suppliers for ordering, invoicing and vendor reports.		
11. The system must support manual entry of invoice data with automatic reconciliation against orders and receipts		
Vendor comment:		
12. The system must allow the receipt of all invoiced items automatically as a part of the invoicing process		
Vendor comment:		
13. The system must allow recording of receipts separately from the invoicing process also		
Vendor comment:		
14. The system must allow orders to be claimed or cancelled and record this in the order record. For cancellations, the funds must be automatically unencumbered, encumbered, and expensed in real time		
Vendor comment:		
15. The system must notify staff of all items that have not arrived by their expected date to allow review		
Vendor comment:		
16. The system must generate claims for orders that are past due		
Vendor comment:		
17. The system must notify staff when a volume or issue of a series has not arrived after a predefined interval, and allow for claiming of missing items.		
Vendor comment:		
18. The system must provide vendor records that allow entry of multiple contacts and addresses for different purposes as required		
Vendor comment:		

19. The system must provide the ability to maintain multiple accounts for a single vendor linked to a main vendor record		
Vendor comment:		
20. The system must offer the ability to maintain discount and delivery information in the vendor record and link this information to individual orders		
21. The Acquisitions Module must be fully integrated with the OPAC and with the other staff modules. Changes made within the Acquisitions module should be reflected in all modules in real time.		
Vendor comment:		
22. Acquisitions data must be automatically and dynamically linked to a bibliographic record.		
Vendor comment:		
23. The system should allow the linked bibliographic data to be overlaid or updated at any time after order placement.		
Vendor comment:		
24. The system should support a "Recommend" function, which allows entry of suggested titles in the OPAC, providing automatic duplicate checking of the database, giving the acquisitions staff the ability to turn the recommendation into an order, and process it with the full functionality of the Acquisitions module.		
Vendor comment:		
25. The system should support selection lists, allowing selectors across the library to review the pending status of an order and add/delete copies to be ordered for their branch/collection.		
Vendor comment:		
26. The system should permit an authorized operator to place a hold against on order materials from within the Acquisitions module.		
Vendor comment:		
27. The system must support the acquisition of shelf-ready materials. Describe how the system supports processing of shelf-ready material.		
Vendor comment:		

	A	N
28. The system must support electronic invoicing for serials.		
Vendor comment:		
29. The system must support Vouchers.		
Vendor comment:		
30. The system should maintain and display all fund history and not a limited view		
Vendor comment:		

Serials

	A	N
1. The system must provide robust print serials management functions.		
Vendor comment:		
2. The Serials module must be fully integrated with the OPAC and with the other staff modules. Changes made within the Serials module should be reflected in all modules in real time.		
Vendor comment:		
3. The system should have the ability to accommodate all types of serials, including, but not restricted to: • Periodicals • Continuations • Law Reports • Newspapers • Annuals • Government Documents • Monographic Series • Memoirs • Proceedings • Transactions • Indexes • Supplements • Loose-Leaf Materials		
Vendor comment:		
4. System must allow the operator to define check-in patterns that accommodate all types of frequencies, (e.g. daily, monthly, quarterly) for both regular and irregularly published serials. The frequency of a check-in card should be easily changed. • The check-in record should contain the following data elements:		

• Past and future issues		
• Cover dates		
• Enumeration		
• Arrival or expected dates		
• Number of copies received		
• Bound, claimed, and late issues		
Vendor comment:		
5. System must indicate "Expected" issue by highlighting that issue or multiple issues. The "Expected" issue(s) must be able to be checked in with a maximum of two keystrokes, or a single mouse click.		
Vendor comment:		
6. The system should allow EVPL to create item records automatically as issues are checked in.		
Vendor comment:		
7. The system should support the check in of multiple copies of an issue on a single check in screen.		
Vendor comment:		
8. The system should easily handle supplements and other unexpected issues which come outside of the normal pattern of receipt.		
Vendor comment:		
9. Describe support for claiming of late issues. Does the system support both print and electronic claiming? Which vendors are supported for electronic claiming?		
Vendor comment:		
10. Describe support for binding of serial issues. Does the system support electronic transmission of bindery data?		
Vendor comment:		

1.1. Electronic Resource Management

	A	N
1. The system must include fully integrated e-resource management, including integration with acquisitions process as well as discovery		
Vendor comment:		
2. The system must support COUNTER usage data and the SUSHI standard for harvesting usage data		
Vendor comment:		
3. The system must be able to manage e-resource licenses, renewals and amendments		

Vendor comment:		
4. The system must allow the digital version of the license to be attached to the license record.		
Vendor comment:		
5. The system must allow correspondence related to the license to be entered or attached to the license record		
Vendor comment:		
6. It should be possible to track the status of a license to see where it is in the negotiation process		
Vendor comment:		
7. The system must alert staff before the expiration date of the e-resource subscription to allow review		
Vendor comment:		

SYSTEM MIGRATION AND IMPLENTATION

Training and Documentation

a. Please provide an overall description of the vendor's training program.
Vendor comment:
b. Training must contain an on-site component, using the library's system, data, and policies.
Vendor *comment:*
c. Describe options for additional training beyond that included in the proposal.
Vendor comment:
d. Please provide a description of the documentation included as part of the proposal. Documentation should be online, keyword searchable, downloadable, and modifiable by the library.
Vendor comment:
e. Describe options for user manuals, websites, videos, etc. for staff use after training is completed
Vendor comment:
f. Testing server must be available
Vendor comment:

Data Conversion and Implementation

a. Describe data conversion and implementation services included in this proposal. Describe Vendor and library roles and responsibilities in the data conversion process.
Vendor comment:
b. Provide a migration and implementation plan with a suggested timetable.
Vendor comment:
c. Does system allow for ingestion of historic acquisition information from Sierra?
Vendor comment:

API and Documentation

a. Describe your APIs and provide common examples of their functionality.
Vendor comment:
b. Are the APIs fully documented? Does the vendor provide a "sandbox" for testing?
Vendor comment:
c. Describe access to the vendor's online documentation. Is a data dictionary available?
Vendor comment:
d. Are data elements available for querying with third party tools, e.g. SQL "read only" access?
Vendor comment:

Support

a. Describe methods for contacting support.
Vendor comment:
b. Do you have a website for opening, updating, and closing tickets?
Vendor comment:
c. Do you allow for multiple users to open tickets?
Vendor comment:
d. Do you have a knowledgebase for known issues?
Vendor comment:
e. Do you have all documentation on the support website?

Vendor comment:
f. Is there documentation for current releases and new release features?
Vendor comment:

PROPOSAL

Having examined this Request for Proposals, including the General Instructions, Contract Specifications, and Proposal; and having become familiar with the requirements herein, the undersigned hereby submits and makes part of the awarded Agreement the following proposal.

The undersigned, through its authorized representatives, hereby certifies that:

The vendor has reviewed this proposal and has found it to be accurate in all material respects.

The vendor's representative is authorized to submit this proposal.

The vendor understands that the figures quoted in the proposal are to be used by the EVPL in determining the most advantageous proposal.

The vendor has familiarized itself with the nature and extent of the Proposal, work, site, locality, and all local conditions, laws and regulations that in any manner may affect cost or furnishing of the work.

This Proposal is genuine and not made in the interest of or on behalf of any undisclosed person, firm, or corporation and is not submitted in conformity with any agreement or rules of any group, association, organization, or corporation; the vendor has not directly or indirectly induced or solicited any other vendor to submit a false or sham bid; the vendor has not solicited or induced any person, firm or corporation to refrain from bidding; and the vendor has not sought collusion to obtain for itself any advantage over any other vendor or over the EVPL.

The vendor does not knowingly employ an unauthorized alien. The undersigned further affirms that, the vendor has enrolled in and verifies the work eligibility status of all its newly hired employees through the E-Verify program.

Signed By: _____

Name (printed):   _____

Title: _____

Company: _____

Date: _____   Telephone: _____

Address: _____   Email Address: _____

_____   Website: _____

Fed Tax ID#:   _____