

SCUGOG MEMORIAL PUBLIC LIBRARY

# Request for Proposal for an Integrated Library System

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For the Scugog Memorial Public Library

**Amy Caughlin**

<b>Issued:</b>	Wednesday, February 27, 2019
<b>Declaration of Intent to Bid Due:</b>	Thursday, March 7, 2019
<b>Vendor Questions Due:</b>	Thursday, March 7, 2019

**Proposals Due On or Before:  
Wednesday, April 3, 2019 at 4pm**

## 1. GENERAL INFORMATION

The Scugog Memorial Public Library is seeking proposals for a single Integrated Library System (ILS). We expect that the recommended ILS will provide the best solution for the requirements and may include products from a single vendor or multiple vendors, with only one vendor submitting the proposal. This vendor will be responsible for the entire implementation of the recommended solution.

The following should be taken into account when bidding:

Population Served	22,500
Library Locations	1 location only
2018 Checkouts	134,283 Items
2018 Digital Circulation	29,942 Items
Bibliographic records	48,972
Item records	52,023
Authority records	474
Patron records	24,498 total; 7,586 active
Staff users	8

### A. Minimum Requirements for ILS

The Scugog Memorial Public Library has based this RFP on the assumption that only vendors with proven implementations in the mandatory core modules listed below will respond to this RFP. The Library expects that sophisticated, mature functionality will be in place for these modules, and that while there will be differences between vendors, the core functionality for these modules is developed and currently implemented in libraries of equal and greater size to Scugog's. Furthermore, the Library will expect any vendors who are short-listed to demonstrate the core features and benefits for each model during on site vendor demos:

<b>Mandatory Core Modules</b>	<b>Additional Modules / Nice to Haves</b>
<ul style="list-style-type: none"><li>• Circulation</li><li>• Cataloguing</li><li>• Catalogue</li><li>• Reporting</li><li>• Serials</li></ul>	<ul style="list-style-type: none"><li>• Acquisitions</li><li>• Marketing and Customer Impact</li></ul>

## B. Current Third Party Vendors

The Scugog Memorial Public Library currently utilizes the following third party vendors and expects that the products offered by these vendors can be seamlessly integrated into the ILS functionality:

Third Party Vendors	Notes
Databases such as Gale, EBSCO, ProQuest, Novelist, etc.	
Proquest Ancestry	In Library Use only
OverDrive	via the Ontario Library Service Download Centre
Tumblebooks	Multi language and multi-products
Recorded Books (RB Digital)	RB Digital Magazines (formerly Zinio)
Recorded Books (RB Digital)	Qello Concerts
Library Services Centre	
Southern Ontario Library	For InterLibrary Loans
	RFID technology will be integrated into the Library in 2021 and will need to work seamlessly with the new ILS.

Third Party Software	Notes
Windows	Windows 10
Clean Slate	
Symantec	Norton Antivirus

## C. Project Timeline

- RFP Issued February 27, 2019
- Declaration of Intent to Bid March 7, 2019
- Deadline for Vendor Questions March 7, 2019 by 4 p.m.
- Response for Vendor Questions March 14, 2019 via email
- Proposals due April 3, 2019 by 4 p.m.
- Contact Short-Listed Vendors April 2019
- On Site Vendor Demonstrations April 2019
- Recommendation of Successful Proponent April 2019
- Start Project May 2019
- Desired Completion end of August 2019

#### **D. Project Timeline**

The official contact for this Request for Proposal:

Amy Caughlin  
CEO  
Scugog Memorial Public Library  
P.O. Box 1049 Stn Main  
231 Water Street  
Port Perry, ON, L9L 1A8  
905-985-7686 x102  
[acaughlin@scugoglibrary.ca](mailto:acaughlin@scugoglibrary.ca)

In order to maintain a fair and impartial selection process, contact with other Scugog Memorial Public Library staff about this RFP is prohibited. Failure to abide by this policy may result in disqualification of proposal. Suspected errors in the proposal should be immediately reported in writing to the official contact.

#### **E. Procedure for Submission of Proposals**

Submit 1 print copy and 1 electronic PDF copy on a USB drive of your proposal. All proposals must be enclosed in a sealed envelope of appropriate packaging with "Proposal" clearly marked on the outside. Mailed or hand delivered proposals should be addressed and delivered to:

Amy Caughlin  
CEO  
Scugog Memorial Public Library  
231 Water Street  
Port Perry, ON, L9L 1A8

Any proposals received after 4 PM EST on April 3, 2019 will not be considered. Any modifications of a proposal received after the closing date and time of the RFP will likewise not be considered. Vendor is solely responsible for the delivery and drop-off of the proposal to the correct location during business hours before the date and hour set on the opening of the proposals.

Submissions of proposals by email will not be accepted.

#### **F. Addendum**

Requests for additional information or interpretation of RFP documents regarding terms, conditions, specifications and performance requirements shall be submitted in writing via email to:

Amy Caughlin  
CEO  
[acaughlin@scugoglibrary.ca](mailto:acaughlin@scugoglibrary.ca)

Questions will be answered in writing in the form of addenda to the RFP and copies will be delivered via electronic mail to all proponents who completed a "Declaration of Intent to Bid". The Scugog Library will be the sole determinant of whether any revision or addenda should be issued as a result of any

questions or other matters, and will extend the proposal deadline if such information significantly alters this solicitation or makes compliance with the original due date impractical.

All requests for interpretation must be received no later than 4:00 p.m. on March 7, 2019. Interpretations by Scugog Memorial Public Library will be issued to proponents in the form of addendum to the RFP and will be delivered via electronic mail no later than 4:00 p.m. on March 14, 2019.

Addenda will be sent by electronic mail to each vendor who completes a “Declaration of Intent to Bid”. All such addenda shall become part of the RFP response and each proponent shall be bound by such addenda.

The successful proponent’s proposal and supporting information, along with this RFP and other written communication, will become part of the contract between the Scugog Memorial Public Library and the successful proponent.

### G. Vendor Criteria and Evaluation

Written proposals will be evaluated by a committee of representatives from the Scugog Memorial Public Library. Finalist vendors will be invited to provide an in-depth demonstration. Note that the lowest cost proposal will not necessarily be the winning proposal. The scoring criteria are as follows:

	Written Proposal	Product Demo	Total Possible Points	Percentage of Total
Corporate Background and Vision	10		10	5%
References	10		10	5%
Cost	15		15	7.5%
User Experience	20	45	65	32.5%
Staff and Technical Functionality	20	45	65	32.5%
Implementation and Training	10		10	5%
Compatibility with Third Party Services	15	10	25	12.5%
<b>Total</b>	<b>100</b>	<b>100</b>	<b>200</b>	<b>100%</b>

### H. Acceptance or Rejection of Proposals

The Scugog Memorial Public Library reserves the right to reject any or all proposals and the lowest cost or any proposal will not necessarily be accepted.

The Scugog Memorial Public Library reserves the right to accept any proposal that is considered best for the interests of Scugog Memorial Public Library.

This RFP does not under any circumstances commit the Scugog Memorial Public Library to pay any costs incurred by any bidder in the preparation and submission of a proposal. The bidder is responsible for all costs associated with its involvement in the process. The Scugog Memorial Public Library shall not be responsible for any liabilities, cost, expenses, loss or damage incurred, sustained or suffered by any vendor by reason of the acceptance or non-acceptance, by the Scugog Memorial Public Library of any proposal or by reason of any delay in the acceptance of a proposal save as provided in the contract.

Proposals that are incomplete, conditional, illegible, obscure or qualified in any way, or that contain additions not called for, erasures, alterations or irregularities of any kind, shall be rejected as informal. Descriptive literature may be included, as long as its sole purpose is only to amplify a response that has been requested in the RFP.

The vendor acknowledges and agrees that nothing contained herein, in the proposal documents or elsewhere, no act done or expense incurred by it in the preparation and submission of this proposal, no trade or industry custom or practice, and no representation or assurance that may have been made or given to it by or on behalf of the Scugog Memorial Public Library, shall in any manner legally bind the Scugog Memorial Public Library, in any circumstances, to accept a proposal, the lowest proposal, a proposal submitted in compliance with the requirements of the proposal documents, or any proposal at all. The vendor further acknowledges and agrees that the Scugog Memorial Public Library shall have complete and unrestricted liberty in this regard and may reject any or all proposals, or may accept any proposal in whatever manner, at whatever proposed price, on whatever terms and for whatever reasons as the Scugog Memorial Public Library, in its absolute discretion, considers to be in its best interests, all without liability or obligation of any kind to the vendor.

## **2. OVERALL INTENDED OUTCOMES DESIRED**

The Scugog Memorial Public Library wishes to contract with a single vendor for a fully functional staff client that is easy to use, provides robust reporting and statistical analysis, with a search interface that is intuitive for our customers.

The solution should provide one place to look for our customers, with library-specific branding and customized marketing features, and facilitate the implementation of the Library's strategic plan initiatives. Both the staff and public interface must be AODA (Accessibility for Ontarians with Disabilities Act) compliant.

In addition to the traditional operational requirements, the Library is extremely interested in tracking customer insights, and conducting a broad range of patron recruitment and relationship activities that drive a more consistent and targeted digital experience for its patrons. This would include creating a consistent, personalized, one-to-one conversation with its audience of users and non-users across all channels, including mobile, social, email, and web.

As part of this vendor evaluation, the Library is soliciting information on the vendor's capabilities and/or plans to offer any functionality that typically falls under the categories of customer relationship management (CRM) or marketing automation platforms (MA).

With this in mind, we strongly encourage vendors to collaborate/partner with marketing/customer engagement companies outside of the vendor family, if the vendor cannot currently demonstrate and support a strong marketing component. This functionality, if available, may be chosen to implement at a later time.

## **3. VENDOR CORPORATE BACKGROUND AND VISION**

Please provide a brief history of your company and the corporate vision for its future. Please be sure to include:

- How you anticipate responding to new technologies
- Your commitment to on-going product development
- Your plan to pursue product improvement
- Future direction over the next 5 years

- Company ownership and independence of management decision-making

#### 4. REFERENCES

Please provide references from other libraries, preferably those in Canada, that currently use your recommended solution. Please supply references that address the following criteria:

- Two references of Libraries that are larger in size than the Scugog Memorial Public Library.
- Two references of Libraries that are equivalent in size to the Scugog Memorial Public Library.

#### 5. DETAILED DESIGN

Please prepare a detailed design for how your proposed solution meets or exceeds the critical requirements listed below. The design must include the following:

- The completed accompanying spreadsheet (“ILS System – Requirement.xlsx”), with all fields in each tab answered with the following criteria:
  - An answer of **YES** if the feature, function, product or service is available as requested and is fully operational using the version proposed at one or more library sites.
  - An answer of **NO** if the feature, function, product or service is not available, is currently in development or is being planned.
  - An answer of **PARTIAL** if the feature, function, product or service is available, but only partially satisfies the requirement. Bidder must indicate what the actual specification of the component is.
- A detailed description of the installation and support services offered. This must include post installation response and resolution times, along with support hours.
- Confirmation that the proposed solution interfaces with the listing of third party vendors above.
- An implementation and installation timeline.
- Verification that all proposed solutions meet minimal Accessibility Standards.
- Other opportunities for leveraging the Proponent’s product.

#### 6. MODULES

##### i. CATALOGUE

The Library expects that a proposed catalogue will include all aspects of library holdings, services, and programs, both internal and external to the Library. Searching should be simple, intuitive, accessible and personalized.

The table below outlines both the required and optional features of the system. All bidders must be able to meet or exceed the minimum feature requirements.

<b>Catalogue Functionality</b>	<b>Feature</b>
Seamless integration with third party vendor information (e.g. Overdrive, RB Digital)	Required
Ability to integrate and display enhanced content, such as reviews, graphics, and read-a-likes	Required
Search includes keyword, browsing and advanced searching	Required
Search results are sortable on any column with results being filterable	Required
Automatic and real-time updates of third party information in catalogue.	Required
Seamless integration of cover art	Required
Functionality of Catalogue is intuitive for end users	Required
Integrated, intuitive online fine payment solution or ability to integrate with third party vendor	Required
Ability to automatically generate and display customized carousels of new and featured items, as per defined parameters	Required
Smart searching and results, including “did you mean?”	Required
Mobile friendly and device responsive on all types of devices	Required
Display and functionality is backward compatible with older devices and older web software	Required
Ability to search and filter by level of material, relevance, availability	Required
Ability to customize wording (descriptors) for item availability, headings and status	Required
AODA Compliant	Required
Integrates with Google Analytics, with ability to separate internal and external traffic	Required
Ability for MARC records to be discoverable by Google	Required
Cross browser compatible (IE, Chrome, Safari, Firefox, Opera, Vivaldi)	Required
Under “My Account”, ability to sort by any column, including holds, items checked out, and history	Required
“My Account” history of checked out items includes option to retain history of deleted items	Required
“My Account” includes option to record and retain digital usage	Required

Account information is secure and cannot be accessed via back button, caching or other methods	Required
Integrated location mapping information to locate item in library integrated into catalogue, showing where an item may be found in the Library	Optional
Integration and access to digital content from third party vendors, such as Overdrive, via the catalogue	Optional
Catalogue provides personal recommendations based on previous activity	Optional
Personalized display as per language selection of user	Optional
Personalized display as per age of user, such as less information displayed for child user	Optional
Integrated ability to submit suggestion to purchase	Optional
Option to integrate GPS or beacon finding technology to find items in library	Optional
If no items are found in searching, automatically offer other suggestions based on reading history and/or search term	Optional
“My Account” history of checked out items includes option to export to Excel	Optional
“My Account” history includes option to recover deleted history	Optional
Access to linked family records via “My Account”	Optional
Ability to link family records of existing customers without staff intervention	Optional
Ability for customer to place, suspend, and cancel holds, and update holds location for linked family members	Optional
Ability for customer to pay fines for themselves or linked family members online, through the catalogue	Optional
Ability for customer to update contact information for linked family members	Optional
Ability for customer to renew items for linked family members	Optional
Ability for adult or teen customer to define ability of other linked family members to access “My Account” or not	Optional
Ability of one person to opt out of family membership, with no staff intervention	Optional
Ability to communicate via “My Account” from library to customer	Optional
Ability to communicate via “My Account” from customer to library	Optional
Ability to email user notifications when newly arrived items are input to the ILS based on a profile set by user in “My Account”	Optional

Ability of user to manage notification options, including method (email, SMS, phone) and for what types of communications (marketing, notifications, outreach, etc.), without staff intervention	Optional
Ability to generate a scannable barcode from a mobile device while logged into "My Account"	Optional

## ii. CIRCULATION

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

The table below outlines both the required and optional features of the system. All bidders must be able to meet or exceed the minimum feature requirements.

Circulation Functionality	Available
<b>CUSTOMER REGISTRATION</b>	
Customer can self-register, with no staff intervention or additional data entry	Required
Customer can update membership information, with no staff intervention or additional data entry	Required
Customer can manage own account, including renew items, pay fines, and cancel or freeze holds, with no staff intervention or additional data entry	Required
Ability to flag child membership that updates to teen membership, with ability of teen to opt out with no staff intervention	Required
Registration process auto-populates fields, such as postal code based on address	Required
Registration process defaults to Ontario as province	Required
Patron record includes field for option to receive publicity from library	Required
Publicity field is connected to preferred type of notification field	Required
Registration process provides alert for duplicate customer records based on name and or other library defined fields	Required
All fields searchable in customer record, including, but not limited to name, telephone, email, and address	Required
Ability for birth date to automatically control and update the customer profile from child to teen card	Required

Ability for birth date to automatically control and update the customer profile from teen to adult card	Required
Customer can renew membership, with no staff intervention or additional data entry	Optional
Ability to link memberships of people in same family	Optional
Connected memberships can see items checked out, holds, and fines, and can renew items, pay fines, and cancel or freeze holds, based on selected user preferences or profiles	Optional
Ability to copy details from one membership registration to another	Optional
Ability for library staff to see current and historical linked family circulation permissions for each patron	Optional
<b>FINANCIAL INFORMATION AND MANAGEMENT</b>	
Option for Patron type to determine fines and fees	Required
Option for Patron type to determine borrowing privileges	Required
Ability to define replacement cost of item by applying factor or percentage of item cost	Required
e-commerce capability at staff stations	Required
e-commerce capability online via website/catalogue	Required
e-commerce capability via mobile web	Required
Collection account integrated with library software	Optional
Collection account is initiated automatically, as per set parameters	Optional
Collection account allows self-payment via e-commerce	Optional
Customer account provides option for pre-payment and credit	Optional
Customer account provides calculation of what customer owes if outstanding items are returned that day	Optional
e-commerce capability at self-checkout stations	Optional
Integration of payments with accounting software via e-commerce	Optional
Integration of payments with accounting software via staff stations	Optional
Collection account integrated with accounting software	Optional
Customer account provides option for refund	Optional

<b>HOLDS MANAGEMENT</b>	
Notification for holds, overdues and courtesy notices, includes all of telephone, print, email and text.	Required
Records are kept for holds, overdues and courtesy notices that illustrate the end to end transmission of the sent message. These reports must be maintained and accessible for six months with records stored within the system	Required
Option to cascade failed notices to secondary method of communication	Required
Allows default holds fulfillment preference to local library	Required
Ability for customer and staff to cancel holds	Required
Ability for customer and staff to suspend or freeze holds	Required
Ability for customer and staff to change pickup location	Required
Option to automatically notify customers with holds when last copy is deleted	Optional
Option to automatically notify customers with holds when order is cancelled	Optional
<b>MATERIALS CIRCULATION AND MANAGEMENT</b>	
Mobile circulation for Android and iOS devices	Required
Mobile circulation can be used inside library building	Required
Mobile circulation can be used outside library in community	Required
Option to use wireless option or offline for mobile circulation	Required
Ability to turn RFID on and off with mobile circulation	Required
Complete integration with RFID self-service functionality, including checkout, renewals, holds management and fines payment at self-checkout stations	Required
Ability to count in-library use of items	Required
Ability to track in-library use of items separately or in conjunction with items that are checked out	Required
Option to auto-renew items based on criteria without staff intervention	Required
Ability to define conditions for auto-renew, such as the ability to exclude material by location code	Required
Same record can be in use at multiple workstations	Required
Receipts can be customized by staff, including option to print customized graphics or advertisements	Required

Receipts can be customized based on defined conditions (e.g. a special notice added if an account needs renewing, if fines are present, etc.)	Required
Ability to provide receipts via multiple options, including email, print, and text message	Required
Ability to provide checkout and check in receipts at staff workstations and self-checkout	Required
Homebound usage history is maintained	Required
Automatic alerts are provided to avoid titles previously checked out to homebound users	Required
Fully integrated digital product usage, including but not limited to OverDrive and RBDigital	Required
Digital product usage recorded as patron activity	Required
Digital product circulation activity visible and managed via customer account	Required
Ability to customize wording and graphics for messages, notices and descriptors for the public	Required
Ability to customize wording and graphics for staff	Required
Mobile worklists for Android and iOS devices	Optional
Mobile worklists provide real time updates	Optional
Support floating collections, including defined thresholds by location	Optional
Support floating collections, including defined thresholds by material type	Optional
Option to include total savings/cost of materials checked out on current visit on receipt	Optional
Option to include total savings/cost of materials checked out in past year on receipt	Optional
Digital product usage managed and tracked through circulation, including checkouts and renewals	Optional
Integrated interlibrary loan functionality when searching for items	Optional
Integrated interlibrary loan functionality when requesting items	Optional
Integrated interlibrary loan functionality for circulating items	Optional
Interlibrary loan information is recorded in customer account	Optional

### iii. MIGRATION AND SUPPORT

Professional and available support is required once the system is live and functional.

The table below outlines both the required and optional features of the system. All bidders must be able to meet or exceed the minimum feature requirements.

<b>Migration and Support Functionality</b>	<b>Available</b>
Work flow analysis is available and conducted before migration of data and before system parameters are established	Required
Easy and complete migration of customer and bibliographic data from VTLS, Virtua (through Innovative) managed by vendor	Required
Availability of tools to convert/upgrade MARC data for increased discoverability	Required
Documentation is provided in one place	Required
Keyword accessible help pages with step by step instructions provided	Required
Ability to customize the help pages with Scugog Memorial Public Library specific processes	Required
On-site training is provided for all functionality, including system administration and configuration	Required
Staff authorization is role based, and moves between modules	Required
System allows staff to change their own password	Required
Included password recovery feature through email	Required
Proactive alerts are provided regarding system and software issues	Required
Known issues are published with up-to-date notes	Required
Regular updates on open tickets are provided to ticket creator	Required
Clear escalation process is provided for unresolved issues	Required
On-going separate test environment is provided to try and test settings and configuration, as well as training	Optional

### iv. REPORTS

The Library expects that the reporting module can integrate ILS and non-ILS data for comprehensive Library reporting.

The table below outlines both the required and optional features of the system. All bidders must be able to meet or exceed the minimum feature requirements.

<b>Reporting Functionality</b>	<b>Available</b>
Ability to import and export data, in industry standard formats (e.g. text, CSV, Excel, XML, PDF)	Required
Ability to display report data graphically	Required
Ability to use report templates, both graphical and numerical	Required
Ability for any user to create custom reports intuitively	Required
Ability to schedule reports	Required
Ability to automatically send report results as per a schedule via email	Required
Provides recommendations for purchase, including title, subject, author, DDC range and genres	Required
Provides reports on where and which library materials are used in library	Required
Ability to track visitor and patron activity across multiple interactions	Required
Ability to identify positive engagements	Required
Ability to identify negative engagements such as inactivity	Required
Ability to produce searching reports, including cross-references between data sets	Required
Report on when searching occurs	Required
Report on where searchers come from, including sites and item carousels	Required
Report on how they search	Required
Report on what they search for	Required
Report on what they find and what they don't find when they search	Required
Report on what they link to or download	Required
Ability to produce interactive reports and data visualizations	Required
Reports and visualizations use templates that allow for customization	Required
Ability to report on and access any data within the database	Required
Reports incorporate external data in an intuitive way	Optional
Provides recommendations for withdrawal, including title, subject, author, DDC range and genres based on pre-established criteria	Optional

Provides library usage analysis reports	Optional
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**v. SYSTEM, SERVER AND SOFTWARE FUNCTIONALITY**

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

The table below outlines both the required and optional features of the system. All bidders must be able to meet or exceed the minimum feature requirements.

<b>System, Software and Server Functionality</b>	<b>Available</b>
Ability to distinctly brand and customize options for staff and public interfaces at each library location	Required
Granular security that can be applied to each user account	Required
Software is always available	Required
Ability to access the software anywhere	Required
Automatic regular backups with no staff intervention	Required
Ability to FTP a copy of the backup to a remote server based on schedule	Required
Software regularly updated and upgraded with no impact on service	Required
Development cycle that is responsive to known issues and enhancements	Required
Notice of software update provided minimum 24 hours in advance of an update	Required
Security measures are included to minimize chance of fraudulent activity or access	Required
Customer information and backups remain in Canada	Required
Ability to add and subtract SIP licenses without additional cost	Required
Ability to add and subtract locations without additional cost	Required
Ability to customize the staff interface	Required
Ability to customize the public interface	Required
Ability to maintain customizations with upgrades	Required
Ability to add and integrate APIs	Required
Documentation for API integration and usage examples	Required

Software is ergonomic	Required
Software is accessible	Required

## vi. CATALOGUING

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

The table below outlines both the required and optional features of the system. All bidders must be able to meet or exceed the minimum feature requirements.

Cataloguing Functionality	Available
Items are discoverable on the internet, including but not limited to BibFrame functionality [linked data/semantic web]	Required
Ability to upgrade records to be discoverable on the internet	Required
Records can be RDA compliant	Required
Tools are available to convert / upgrade MARC data to RDA or other future cataloguing standards	Required
Ability to index any and all fields in MARC record	Required
Ability to integrate digital content from third party vendors	Required
Ability to integrate digital content from the web	Required
Ability to integrate digital content from local library	Required
Access and utilize MARC records from a variety of sources, such as vendors and other libraries	Required
Ability to define multiple loading properties	Required
Ability to specify loading parameters for overlay in loading profiles	Required
Ability to specify match-point in loading profiles	Required
Ability to automatically create and populate item information during MARC record loading process	Required
Z39.50 capability, including ability to determine match points	Required
Spell check capability, including Canadian English	Required
Ability to accept and display diacritics in importing records	Required

Ability to accept and display diacritics in record creation	Required
Ability to make global changes to the system	Required
Ability to retrieve deleted records through title, ISBN, author or barcode	Required
Authorities can be automatically updated on a defined schedule	Optional

## vii. SERIALS

The Library expects a seamless tracking solution for the serials module, with limited staff interaction once the parameters are established.

The table below outlines both the required and optional features of the system. All bidders must be able to meet or exceed the minimum feature requirements.

<b>Serials Functionality</b>	<b>Available</b>
Ability to automatically send claimed missing issues to vendor, as per configured parameters, with no staff intervention	Required
Report of missing issues automatically generated	Required
Ability to utilize frequency information from vendor to automatically create check-in boxes	Required
Serials invoicing occurs automatically, with no staff intervention, and automatically connects into accounting software.	Required

## viii. ACQUISITIONS

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

The table below outlines both the required and optional features of the system. All bidders must be able to meet or exceed the minimum feature requirements.

<b>Acquisitions Functionality</b>	<b>Available</b>
Orders initiated by staff automatically flow through ordering, receiving and invoicing with no additional staff intervention	Optional
Orders and invoices are integrated with distributor / vendor system, with no staff intervention	Optional
Invoices are integrated into accounting software, with no staff intervention	Optional
Ability to easily add additional copy or copies to unfulfilled order records	Optional

Canadian tax rules are automatically applied as per type of item	Optional
Ability to adjust allocation of tax that account for rebate	Optional

**ix.     MARKETING AND CUSTOMER IMPACT ENGAGEMENT**

The Library would like to explore the option of integrating the features and benefits listed below as a means of marketing within an ILS. The proposed solution should provide, or be able to be added at a later date, the following features:

- An integrated, up-to-the-minute patron and non-patron dataset including demographics, activity (checkouts, renewals), and monitored/solicited behaviours (surveys, email responses);
- A broad set of email, website, and social interaction tools to allow for the development of engagement programs that are customizable to the Scugog Memorial Public Library’s marketing and operational goals;
- Complete on-board and on-going technical support and marketing consulting services.

The table below outlines both the required and optional features of the system. All bidders must be able to meet or exceed the minimum feature requirements.

<b>Marketing / Customer Impact Functionality</b>	<b>Available</b>
Ability to integrate email lists	Optional
Ability to merge email lists with existing patron data	Optional
Ability to segment database by demographics	Optional
Ability to segment database by simple behaviours (ex: clicked on link in email)	Optional
Ability to segment database by cross-channel social web activities (ex: Facebook)	Optional
Ability to segment based on customer library activity	Optional
Ability to segment based on checkouts	Optional
Ability to segment based on downloads	Optional
Ability to create customer profiles, such as “lifelong learners”, “streamers”, “occasionals”	Optional
Ability to segment and send large group emails	Optional
Ability to track and report on deliveries, opens, and clicks on specific links within emails	Optional
Ability to create and automatically build static lists, based on user behaviour, demographics or other criteria	Optional

Ability to create and automatically build dynamic lists, based on user behaviour, demographics or other criteria	Optional
<b>CONTENT CREATION, TRACKING AND MANAGEMENT</b>	
Fully functional WYSIWYG to support targeted customer communication via email	Optional
Allows content to adhere to the Scugog Memorial Public Library branding standards and website designs	Optional
Ability to produce patron digital interactions based on patron behaviour	Optional
Ability to track email program performance for individual blasts	Optional
Ability to track email program performance across multiple blasts	Optional
Ability to schedule email communication in advance	Optional
Ability to schedule social media communication in advance	Optional
Ability to schedule other customer communication in advance	Optional
Fully supports un-subscribe requests	Optional
Uses responsive design for mobile phones and tablets	Optional
Ability to experiment with subject lines, copy, graphics, calls-to-action, frequency, etc. to see which emails perform best	Optional
Ability to experiment with subject lines, copy, graphics, calls-to-action, frequency, etc. to test content on landing pages, social ads, display ads and more, based on segmentation	Optional
Ability to create and integrate blog publishing	Optional
Ability to track blog publishing	Optional
<b>VISITOR / PATRON NUTURING AND ENGAGEMENT</b>	
Ability to track cross-channel behaviors to send personalized nurture email messages	Optional
Ability to track cross-channel behaviours to coordinate marketing across channels	Optional
Ability to automatically send triggered email responses, based on the recipient's actions or behaviour	Optional
Ability to set up and deliver a series of service offerings	Optional
Ability to easily add new services or offerings to campaigns	Optional
Ability to automatically suppress content an individual has already seen	Optional

Ability to personalize emails for different site visitors based on their behaviours and attributes	Optional
Ability to personalize landing pages for different site visitors based on their behaviours and attributes	Optional
Ability to easily and effectively engage, track, nurture, and manage user and visitor activity throughout user lifecycle	Optional
<b>SYSTEM INTEGRATION / FUNCTIONALITY</b>	
Fully capable of accessing and updating ILS patron data	Optional
Provides up-to-the minute synchronization of datasets	Optional
Ability for non-IT staff to create, update and manage emails	Optional
Availability of a single browser-based staff client for managing the above-mentioned functionality including work flows creation and management	Optional
Availability of a single browser-based staff client for integrated reporting	Optional
Availability of a single browser-based staff client for managing email creation/management	Optional
Ability to test email design/function against leading email clients (Google Mail, Outlook)	Optional
Fully developed set of API's to support the features/functionality for the marketing components	Optional
Ability to automatically connect on social media	Optional
Adheres to all Canadian and Ontario provincial laws	Optional
Adheres to Anti-Spam Legislation, including opt-in and opt-out tools	Optional
Adheres to Freedom of Information and Protection of Privacy Act	Optional
Adheres to Municipal Freedom of Information and Protection of Privacy Act	Optional

## 7. COST

Provide first year pricing and an additional 4-year ongoing contract pricing summary. Please provide information on any discounts or special pricing available for early payment, extended contracts or other options. Final costs will be determined during the final negotiation phase with the selected vendor to ensure the inclusion of all selected and appropriate modules and functionality.

Whenever a proposal in the amount proposed for an item does not agree with the extension of the estimated quantity and the proposed unit price, the unit price shall govern and the amount shall be corrected accordingly.

If proposing a locally hosted and a SaaS option, provide separate pricing.

All pricing must be provided in Canadian dollars as of the date submitted.

Use the Cost Proposal Template in **Appendix II** to lay out costs, adding additional fields as necessary.

## **8. GENERAL TERMS AND CONDITIONS**

The following Terms and Conditions are in addition to those that will be contained in the signed contract. To the extent there are any conflicts between this RFP and the signed contract, the Terms and Conditions in the signed contract will prevail.

All responses, inquiries, and correspondence relating to this RFP and all reports, charts, displays, schedules, exhibits, and other documentation produced by the proposal process that are submitted as part of the proposal or otherwise shall become the property of the Scugog Memorial Public Library and may be considered public information under applicable law.

### **A. Exclusion of Vendor in Litigation**

No bid will be accepted from any vendor inclusive of its subcontractor(s), which has a claim or instituted a legal proceeding or has threatened a claim or instituted a legal proceeding against the Scugog Memorial Public Library, the Township of Scugog, or against whom either library has a claim or instituted a legal proceeding with respect to any previous contract.

### **B. Effective Term of Proposal**

Unless a proposal is expressly rejected, all proposals will remain in effect for 210 days subsequent to the proposal opening. The Scugog Memorial Public Library may request that vendor extend the effective period of their proposal. Such requests shall be in writing and will require vendor's written consent to the extension.

Vendor may not withdraw, cancel, or modify its proposal for a period of 210 days after the advertised closing time for the receipt of proposals.

### **C. Award and Negotiations**

This Request for Proposal does not obligate the Scugog Memorial Public Library to accept or contract for any expressed or implied services. Likewise, the Scugog Memorial Public Library is not obligated to award a contract pursuant to this RFP.

The Scugog Memorial Public Library reserves the right to enter into discussions with the vendors whose proposals are deemed most advantageous for the purpose of negotiation. If more than one proposal is found to be satisfactory, the Scugog Memorial Public Library reserves the right to negotiate simultaneously with more than one vendor. The Scugog Memorial Public Library also reserves the right to stay with its current ILS provider if it determines that this is the best interest of the Library.

If applicable, the Scugog Memorial Public Library will post a notice to its website recommending a preferred vendor. The notice extends the effective term of the vendor's proposal until the parties sign a contract or determine not to sign a contract.

Contract award and negotiations will be in accordance with the purchasing policies of the Scugog Memorial Public Library.

#### **D. Rejection of Proposal and Waiver of Informalities**

The Library, in its sole discretion and authority, may determine that it is in the best interest to reject any or all proposals submitted in response to this RFP. The Library, in its sole discretion and authority, may disregard or waive any informality in the proposals or bidding process.

#### **E. Reservations**

Vendor must read and understand the solicitation and tailor the proposal and all activities to ensure compliance. The Library reserve the right to: amend the solicitation; reject any or all of the proposals; and waive minor defects. The Library may request a clarification, inspect vendor's premises, interview staff, request a presentation, or otherwise verify the contents of the proposal, including information about subcontractors and suppliers. The Library may request best and final offers where appropriate. The Library will make all decisions on compliance, evaluation, terms and conditions, and shall make decisions in the best interests of the Library. Failure of a vendor to comply with requests for information or cooperate may result in the proposal being deemed non-responsive to the solicitation. Submitting a proposal does not entitle a vendor to an award or contract. The Library is not responsible for and will not pay any costs associated with the preparation and submission of any proposal. Awarded vendor shall not commence, and will not be paid for, any billable work prior to the date all parties execute the contract.

#### **F. Incorporating Costs**

Bid prices must incorporate any/all peripheral costs including, but not limited to the costs of products/services, delivery/transportation charges, training materials, labour, insurance, applicable taxes, warranty, overhead and profit, applicable customs duty, etc. that are required by the RFP.

#### **G. Harmonized Sales Tax**

All submissions shall indicate separately, Harmonized Sales Tax.

#### **H. Withdrawal of Proposal**

Vendors may withdraw their proposal at any time prior to the date and time for proposal opening. Requests for withdrawal must be made in writing on the vendor's letterhead to the official contact for the RFP. The withdrawal of a tender does not disqualify a vendor from submitting another tender on the same contract.

#### **I. Contractor Insolvency and Default**

The purchase may be terminated effective upon written notice to the contractor in the event that the contractor files for bankruptcy, becomes insolvent, makes an assignment for the benefit of creditors, or has a receiver appointed, or any proceeding is demanded for, by or against the contractor under any provision of the Federal Bankruptcy Act or any applicable provincial law.

Upon default of the contractor, the Scugog Memorial Public Library may reduce or many cancel the contract in the event that any delivery or deliveries affected are not made at the time specified in the proposal.

#### **J. Responsibility**

A vendor is considered responsible when it has the capability in all respects to fully perform the contract requirements and has the integrity and reliability that will assure good faith performance. The Scugog Memorial Public Library will determine whether or not to do business with a vendor. The Scugog Memorial Public Library may consider factors including, but not limited to certifications, conflict of interest, financial disclosures, past performance, references (including those found outside the solicitation), compliance with applicable laws, financial responsibility, insurability, equal opportunity compliance, capacity to produce, ability to provide required maintenance services or other matters relating to the vendor's probable ability to deliver the required services within the time and price as specified in this RFP.

#### **K. Workplace Safety and Insurance Board**

The successful vendor shall furnish a WSIB Clearance Certificate indicating their WSIB firm number, account number and that their account is in good standing. This certificate must be furnished prior to commencement of work, and shall provide additional certificates prior to the expiry date of the certificate on file during the term of the contract to ensure their WSIB account in good standing throughout the contract period.

#### **L. Workplace Safety and Insurance Board**

Contractors and Sub-Contractors are external to the Scugog Memorial Public Library and include all those individuals or organizations working on a contract for the Scugog Memorial Public Library. The health and safety responsibilities for Contractors and Sub-Contractors include the following:

- Demonstrate the establishment and maintenance of health and safety program, with objectives and standards and will provide qualified workers and meet all applicable legislation as well as Library Health and Safety Policies and Procedures.
- Are held accountable for their health and safety performance.
- Ensure the workers in their employ are aware of the hazardous substances that may be in use at the workplace and wear the appropriate personal protective equipment required for the area.

Proof of the above may be required by the Scugog Memorial Public Library at any time from tendering to project completion.

All work performed under this Contract must be carried out in accordance with the terms and conditions of the Occupational Health & Safety Act, R.S.O., 1990, C.01. as amended, the Environmental Protection Act, the Highway Traffic Act and all other applicable Acts, Regulations, or By-Laws governing the work to be performed. Violations of any such legislation may result in a termination of this agreement.

#### **M. Accessibility Standards for Customer Service**

The Vendor shall comply with applicable Regulations of the Accessibility for Ontarians with Disabilities Act, 2005 (the AODA), with regard to the provision of its goods or services contemplated herein, specifically:

- Ontario Regulation 429/07: Accessibility Standards for Customer Service
- Ontario Regulation 191/11: Integrated Accessibility Standards

The Vendor shall ensure that any employees, agents, volunteers, or others for whom it is at law responsible and who are involved in providing goods and services to the Scugog Memorial Public Library receive training as required by these regulations.

#### N. Errors and Omissions

It shall be understood and acknowledged that while this RFP includes specific requirements and specifications, minor items or details not herein specified, but obviously required shall be provided as if specified in conformance with current practices and workmanship. Any omissions, errors or misinterpretation of these requirements and specifications or within the proposal bid shall not relieve the vendor of the responsibility of providing the goods and services as aforesaid.

#### O. Infringements and Indemnification

The Contractor, both during and after the term of this Agreement, shall at all times, and at its own cost, expense and risk, defend, indemnify and hold harmless the Scugog Memorial Public Library and/or the Township of Scugog, its elected officials, officers, employees, volunteers, agents, contractors, and all respective heirs, administrators, executors, successors and assigns from any and all losses, damages (including, but not limited to, incidental, indirect, special and consequential damages, or any loss of use, revenue or profit by any person, organization or entity), fines, penalties and surcharges, liabilities (including, but not limited to, any and all liability for damage to property and injury to persons, including death), judgments, claims, demands, causes of action, contracts, suits, actions or other proceedings of any kind (including, but not limited to proceedings of a criminal, administrative, or quasi criminal nature) and expenses (including, but not limited to, legal fees on a substantial indemnity basis), which the indemnified person or persons may suffer or incur, howsoever caused, arising out of or in consequence of or directly or indirectly attributable to the Services required to be performed by the Contractor, its agents, employees and sub-contractors on behalf of the Scugog Memorial Public Library, provided such losses, damages, fines, penalties and surcharges, liabilities, judgments, claims, demands, causes of action, contracts, suits, actions or other proceedings of any kind and expenses as defined above are due or claimed to be due to the negligence, breach of contract, and/or breach of law of the Contractor, its agents, employees or sub-contractors.

#### P. Insurance

It is the responsibility of the Contractor and their Insurance Broker to review all potential operations and exposures to determine if the coverage and limits noted below are sufficient to address all insurance related exposures presented by the specification of the Project, Work or Supply. The Contractor shall insure its undertaking, business and equipment under the following coverage so as to protect and indemnify and save harmless the Scugog Memorial Public Library:

**General Liability Insurance:** The Contractor shall maintain liability insurance acceptable to the Scugog Memorial Public Library throughout the term of this Agreement from the date of commencement of work until one year from the date of substantial performance of work. Coverage shall consist of a comprehensive policy of public liability and property damage insurance, with all available coverage extensions/endorsements, in an amount of not less than \$2,000,000 per occurrence. Such insurance shall name the Scugog Memorial Public Library and any other person or party identified in the contract documents, as an additional insured with a cross liability endorsement and severability of interests provision. The policy SIR/deductible shall not exceed \$100,000 per claim

and if the policy has an aggregate limit, the amount of the aggregate shall be double the required per occurrence limit.

**Owned and Non-Owned Automobile Liability Insurance:** The Contractor shall maintain liability insurance on all Owned, Non-Owned and Leased Automobiles used in the performance of this project to a limit of \$2,000,000 per occurrence throughout the term of this Agreement from the date of commencement of work and until one year after the date of substantial performance of work.

**Provisions:** Prior to the commencement of work the Contractor shall forward a Certificate of Insurance evidencing this insurance with the executed Agreement. The Certificate shall state that coverage will not be suspended, voided, cancelled, reduced in coverage or in limits except after thirty (30) days (ten (10) days if cancellation is due to non-payment of premium) prior written notice by certified mail to the Scugog Memorial Public Library.

It is also understood and agreed that in the event of a claim any deductible or self-insured retention under these policies of insurance shall be the sole responsibility of the Contractor and that this coverage shall preclude subrogation claims against the Scugog Memorial Public Library and any other person insured under the policy and be primary insurance in response to claims. Any insurance or self-insurance maintained by the Scugog Memorial Public Library and any other person insured under the policy shall be considered excess of the Contractor's insurance and shall not contribute with it. The minimum amount of insurance required herein shall not modify, waive or otherwise alter the Contractor's obligation to fully indemnify the Scugog Memorial Public Library under this Agreement.

The Scugog Memorial Public Library reserves the right to modify the insurance requirements as deemed suitable.

**Third Party Claims Process:** The Scugog Memorial Public Library's claims process for Third Party claims is to refer the claimant directly to the Contractor and to leave the resolution of the claim with the Contractor. This applies regardless of whether or not it is an insured loss.

As the Scugog Memorial Public Library has a responsibility to the taxpayers, we must ensure that claimants are dealt with in a fair and efficient manner. Claims reported to the Contractor, either directly by a third party or through the Scugog Memorial Public Library shall be promptly investigated by the Contractor. The Contractor shall make contact with the third party claimant within 48 hours of receipt of notice of a claim. The Contractor shall initiate an investigation of the claim immediately upon notice, and advise the third party claimant in writing, with a copy to the Scugog Memorial Public Library, of its position regarding the claim within 21 calendar days of the notice. The Contractor shall include in their response the reasons for their position.

Should this position not resolve the claim and be accepted by the third party claimant, the Contractor shall immediately report the claim to its Insurer for further review. (Insurer for this purpose is defined as either the Claims Department of the Contractor's Insurance Company or the Claim's Administrator at the Contractor's Insurance Broker.) The Contractor's Insurer upon receipt of this claim shall advise the third party claimant by letter, with a copy to the Scugog Memorial Public Library, that they are now investigating the claim. When a final position on the claim has been determined, the Contractor's Insurer shall advise the third party claimant by letter, with a copy to the Scugog Memorial Public Library. Failure to follow this procedure shall permit the Scugog Memorial Public Library to investigate and resolve any such claims. Nothing herein shall limit the right of the Scugog Memorial Public Library to investigate and resolve any such claims notwithstanding the response of the Contractor and/or its Insurer and to seek indemnification from the Contractor or to exercise any other rights under the Contract. The Scugog Memorial Public Library may, without breaching this contract, retain from the funds owing to the Contractor an amount that, as between the Scugog Memorial Public Library and the

Contractor, is equal to the balance in the Scugog Memorial Public Library's favour of all outstanding debts, claims or damages, whether or not related to this contract.

#### **Q. Compliance with Laws**

Vendors are assumed to have made themselves familiar with and will abide by all Federal, Provincial, Municipal and Local Laws, rules and regulations which in any way affect the work, and no plea of misunderstanding will be considered on account of ignorance thereof. If the vendor shall discover any provisions in the drawings, specifications or contract that are contrary to or inconsistent with any law, rule or regulation, they shall at once report it to the Scugog Memorial Public Library's Representative, in writing.

#### **R. Warranty**

Bidders shall provide a full statement of warranty. The warranty should clearly describe the terms under which the bidder accepts responsibility for the cost to repair defects caused by faulty design, quality of work or material, and for what period of time after installation.

#### **S. Force Majeure**

If the contractor is delayed in delivery by labour disputes, strikes, lock-outs, fire, or by any cause of any kind whatsoever beyond the contractor's control, the time of the delivery be extended for a period of time equal to the time lost due to such delays, at no cost penalty to the Scugog Memorial Public Library. No such delivery time extension shall be made for delays unless written notice of same is given to the Scugog Memorial Public Library within seven days of its commencement. Where it is the case of a continuing cause of delay, only one claim shall be necessary.

#### **T. Disclosure of Bid Information**

The vendor acknowledges that submission of a bid for this Proposal will be deemed by the Scugog Memorial Public Library to be the vendor's consent to the Scugog Memorial Public Library publishing or releasing the awarded Contractor's name and total bid price (if applicable), publicly in any format including without limitation the right to post this information on its website and include it in written reports to Council. Any limitation or qualification on the Scugog Memorial Public Library's right to release the awarded Contractor's name and total bid price (if applicable), will result in the bid being found non-compliant. The Scugog Memorial Public Library appreciates the sensitive nature of unit pricing and will endeavor to hold unit pricing in confidence but may be required to release such information pursuant to court order or legislation including the Municipal Freedom of Information and Protection of Privacy Act.

## Appendix I: Declaration of Intent to Bid

### REQUIRED:

All vendors are required to complete this form and email it to [acaughlin@scugoglibrary.ca](mailto:acaughlin@scugoglibrary.ca) in order for their proposal to be eligible for consideration.

### DEADLINE:

Thursday, March 7, 2019 4:00 p.m. EST

In compliance with the requirements of RFP for a Library Management System, the following business is hereby indicating an intent to submit a proposal:

### Company

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Website: \_\_\_\_\_

### Representative for all communications related to the RFP:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Website: \_\_\_\_\_

### Scugog Memorial Public Library contact for all questions and correspondence:

Amy Caughlin, CEO  
Scugog Memorial Public Library  
P.O. Box 1049, Stn Main  
231 Water Street  
Port Perry, ON L9L 1A8  
905-985-7686 ext. 102  
[acaughlin@scugoglibrary.ca](mailto:acaughlin@scugoglibrary.ca)

## Appendix II: Cost Proposal

Units	Description	Initial Cost + Year 1	Year 2	Year 3	Year 4	Year 5
Infrastructure						
	Hosting Fee / Server Cost					
	Test Database					
ILS Applications						
	Staff Licenses					
	Acquisitions					
	Cataloguing					
	Circulation					
	Marketing / Customer Relationship Manager					
	Online Catalogue					
	Reporting Module					
	Serials					
	Others – List					
	<b>Subtotal</b>					
Professional Services						
	Project Management					
	Work Flow Analysis					
	Data Extraction					
	Migration Services					
	Installation, configuration, staging and implementation of ILS					
	On-site Training on all ILS features					

	System Administration and User Documentation					
	Integration of third party products					
	Technical Support					
	<b>Subtotal</b>					
<b>Total Cost Per Year (without taxes)</b>						
<b>Total Tax</b>						
<b>Total Cost per Year (including taxes)</b>						

### Future Optional Costs

I/We certify that I/we have the authority to bind the company.

Company Name	
Address	
Postal Code	
Telephone Number	
Email	
Name	
Title	
Authorized Signature	
Date	

NOTE: Failure to sign this page will result in non-acceptance of this proposal.