

REQUEST FOR PROPOSAL #15-0166FL INTEGRATED LIBRARY SYSTEM

Manatee County, a political subdivision of the State of Florida (hereinafter "Manatee County" or the "County") will receive proposals from individuals, corporations, partnerships, and other legal entities authorized to do business in the State of Florida, to provide an Integrated Library System.

DEADLINE FOR CLARIFICATION REQUESTS: **December 2, 2014 at 2:00 PM** shall be the deadline to submit all inquiries, suggestions, or requests concerning interpretation, clarification or additional information pertaining to this Request for Proposal to the Manatee County Purchasing Division. This deadline has been established to maintain fair treatment for all potential bidders or Proposers, while ensuring an expeditious transition to a final agreement.

TIME AND DATE DUE: Proposals will be received until **December 17, 2014 at 4:00 P.M.** at which time they will be **publicly opened**. All interested parties are invited to attend this opening.

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Important Note: **A prohibition of Lobbying is in place. Please review paragraph A.17 carefully to avoid violation and possible sanctions.**

FOR INFORMATION CONTACT:
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Manatee County Financial Management Department
Purchasing Division

AUTHORIZED FOR RELEASE: DWW

SECTION A: INFORMATION TO PROPOSERS

PROPOSERS MUST COMPLY WITH THE FOLLOWING INSTRUCTIONS TO BE CONSIDERED FOR SELECTION.

A.01 OPENING LOCATION

These proposals will be publicly opened at Manatee County Purchasing Division, 1112 Manatee Avenue West, 8th Floor, Suite 803, Bradenton, Florida 34205, in the presence of County officials at the time and date stated on the cover sheet. All Proposers or their representatives are invited to attend.

A.02 PROPOSAL INFORMATION AND PROPOSAL DOCUMENTS

Request For Proposals on <http://www.mymanatee.org>

Request For Proposal documents and the Notices of Intent to Award related to those Proposals are available for download in a portable document format (.PDF) file on the Manatee County web page on the Purchasing tab under "Bids and Proposals". You may access these files using Adobe Acrobat software. You may download a free copy of this software (Adobe) from the County's web page if you do not have.

Manatee County collaborates with the Manatee Chamber of Commerce on distributing solicitations using the Chambers website: <http://www.Manateechamber.com>. This step is in addition to the posting on Manatee County Government web page.

Manatee County may also use an internet service provider to distribute Bids and Proposals. A link to that service <http://www.DemandStar.com>, is provided on this website under the Tab "MyDemandStar". Participation in the DemandStar system is not a requirement for doing business with Manatee County.

Note: The County posts the **Notice of Source Selection** prior to COMMENCING NEGOTIATIONS with the selected firms.

IT IS THE RESPONSIBILITY OF EACH PROPOSER, PRIOR TO SUBMITTING THEIR PROPOSAL, TO CONTACT THE MANATEE COUNTY PURCHASING DIVISION (see contact information on page one of this document) TO DETERMINE IF ADDENDA WERE ISSUED AND TO MAKE SUCH ADDENDA A PART OF THEIR PROPOSAL.

A.03 REQUIREMENTS FOR FORMAT AND DELIVERY OF PROPOSALS

Any proposals received after the stated time and date will not be considered. It shall be the sole responsibility of the Proposer to have their proposal delivered to the Manatee County Purchasing Division for receipt on or before the stated time and date. If a proposal is sent by U.S. Mail, the Proposer shall be responsible for

its timely delivery to the Purchasing Division. Proposals delayed by mail shall not be considered, shall not be opened at the public opening, and arrangements shall be made for their return at the Proposer's request and expense.

Proposals must be submitted in the format specified in Section C hereof. The contents of each proposal shall be **separated and arranged with tabs in the same order as listed in the Subsections within Section C** identifying the response to each specific item thereby facilitating expedient review of all responses.

A.04 CLARIFICATION & ADDENDA

Each Proposer shall examine all Request for Proposal documents and shall judge all matters relating to the adequacy and accuracy of such documents. Any inquiries, suggestions or requests concerning interpretation, clarification or additional information pertaining to the Request for Proposal shall be made in writing through the Manatee County Purchasing Division. The County shall not be responsible for oral interpretations given by any County employee, representative, or agent. The issuance of a written addendum by the Purchasing Division is the only official method whereby interpretation, clarification or additional information can be given.

Addenda shall be posted on <http://www.mymanatee.org>.

It shall be the responsibility of each Proposer, prior to submitting their proposal, to contact the Manatee County Purchasing Division at (941)748-4501, ext. 3014 to determine if addenda were issued and to acknowledge receipt of same on the Proposal Signature page (Attachment A).

DEADLINE FOR CLARIFICATION REQUESTS: December 2, 2014 at 2:00 PM shall be the deadline to submit all inquiries, suggestions, or requests concerning interpretation, clarification or additional information pertaining to this Request for Proposal to the Manatee County Purchasing Division.

This deadline has been established to maintain fair treatment for all potential bidders or Proposers, while ensuring an expeditious transition to a final agreement.

A.05 SEALED & MARKED

One signed Original (marked Original) and Five (5) Copies (marked Copy) and Two (2) CD of your proposal shall be submitted in one sealed package, clearly marked on the outside "**Sealed Proposal #15-0166FL Integrated Library System**" and addressed to:

Manatee County Purchasing Division
1112 Manatee Avenue West, Suite 803
Bradenton, FL 34205

A.06 LEGAL NAME

Proposals shall clearly indicate the legal name, address and telephone number of the Proposer (company, firm, partnership, individual). Proposals shall be signed above the typed or printed name and title of the signer. The signer shall have the authority to bind the Proposer to the submitted proposal.

A.07 PROPOSAL EXPENSES

All expenses for making proposals to the County are to be borne by the Proposer.

A.08 EXAMINATION OF OFFER

The examination of the proposal and the Proposer generally requires a period of not less than ninety (90) calendar days from the date of the opening of the proposals.

A.09 DISCLOSURE

Upon receipt, all inquiries and responses to inquiries related to this Request for Proposal become "Public Records" and are subject to public disclosure consistent with Chapter 119, Florida Statutes.

Proposals become subject to disclosure thirty (30) days after the Opening or if a notice of intended award decision is made earlier than this time as provided by Florida Statute 119.071(1)(b). No announcement of review of the offer shall be conducted at the public opening. If the County rejects all offers and concurrently notices its intent to reissue the solicitation, initial offers are exempt until the County provides notice of its intended decision or, thirty (30) days after the opening of the new offers.

Pursuant to Florida Statutes 119.0701, to the extent successful Proposer is performing services on behalf of the County, successful Proposer must:

- a. Keep and maintain public records that ordinarily and necessarily would be required by the County in order to perform the service;
- b. Provide the public with access to public records on the same terms and conditions that the County would provide and at a cost that does not exceed the cost provided in F.S. Chapter 119, or as otherwise provided by law;
- c. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law, and;

- d. Meet all requirements for retaining public records and transfer, at no cost, to the County all public records in possession of successful Proposer upon termination of the awarded Agreement and/or PO and destroy any duplicate public records that are exempt or confidential from public records disclosure requirements. All records stored electronically must be provided to the County in a format this is compatible with the County's information technology systems.

A.10 ERRORS OR OMISSIONS

Once a proposal is submitted, the County shall not accept any request by any Proposer to correct errors or omissions in the proposal.

A.11 DISQUALIFICATION DUE TO NON-RESPONSIVENESS

Manatee County reserves the right to find that any proposal received which does not contain all of the information, attachments, verification, forms or other information, may be considered non-responsive and therefore be disqualified from eligibility to proceed further in the RFP process.

A.12 RESERVED RIGHTS

The County reserves the right to accept or reject any and/or all proposals, to waive irregularities and technicalities, and to request resubmission. Any sole response received by the first submission date may or may not be rejected by the County, depending on available competition and timely needs of the County. The County reserves the right to award the contract to a responsible Proposer submitting a responsive proposal, with a resulting negotiated agreement which is most advantageous and in the best interests of the County. The County shall be the sole judge of the proposal, and the resulting negotiated agreement that is in its best interest and its decision shall be final. Also, the County reserves the right to make such investigation as it deems necessary to determine the ability of any Proposer to perform the work or service requested. Information the County deems necessary to make this determination shall be provided by the Proposer. Such information may include, but shall not be limited to: current financial statements prepared by an independent CPA; verification of availability of equipment and personnel; and past performance records.

A.13 APPLICABLE LAWS

Proposer must be authorized to transact business in the State of Florida. All applicable laws and regulations of the State of Florida and ordinances and regulations of Manatee County will apply to any resulting agreement. Any involvement with any Manatee County procurement shall be in accordance with Manatee County Code Chapter 2-26.

A.14 CODE OF ETHICS

With respect to this proposal, if any Proposer violates, directly or indirectly, the ethics provisions of the Manatee County Purchasing Code and/or Florida criminal or civil laws related to public procurement, including but not limited to Florida Statutes Chapter 112, Part II, Code of Ethics for Public Officers and Employees, such Proposer will be disqualified from eligibility to perform the work described in this Request for Proposal, and may also be disqualified from furnishing future goods or services to, and from submitting any future bids or proposals to supply goods or services to, Manatee County.

By submitting a proposal, the Proposer represents to the County that all statements made and materials submitted are truthful, with no relevant facts withheld. If a Proposer is determined to have been untruthful in its proposal or any related presentation, such Proposer will be disqualified from eligibility to perform the work described in this Request for Proposal, and may also be disqualified from furnishing future goods or services to, and from submitting any future bids or proposals to supply goods or services to, Manatee County.

A.15 COLLUSION

By offering a submission to this Request for Proposal the Proposer certifies the Proposer has not divulged to, discussed or compared his proposal with other Proposers and has not colluded with any other Proposer or parties to this proposal whatsoever. Also, the Proposer certifies, and in the case of a joint proposal, each party thereto certifies, as to their own organization that in connection with this proposal:

- a. any prices and/or data submitted have been arrived at independently, without consultation, communication or agreement, for the purpose of restricting competition, as to any matter relating to such prices and/or cost data, with any other Proposer or with any competitor;
- b. any prices and/or cost data quoted for this proposal have not been knowingly disclosed by the Proposer prior to the scheduled opening directly or indirectly to any competitor;
- c. no attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition;
- d. the only person or persons interested in this proposal as principal or principals is/are named therein and that no person other than therein mentioned has any interest in this proposal or in the contract to be entered into; and

- e. no person or agency has been employed or retained to solicit or secure this contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, excepting bona fide employees.

A.16 PUBLIC ENTITY CRIMES

In accordance with Section 287.133, Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases or real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017 for Category Two for a period of 36 months from the date of being placed on the convicted vendor list.

In addition, Manatee Code of Laws Chapter 2-26 Article V prohibits the award of County contracts to any person or entity who/which has, within the past 5 years, been convicted of, or admitted to in court or sworn to under oath, a public entity crime or of any environmental law that, in the reasonable opinion of the Purchasing Official, establishes reasonable grounds to believe the person or business entity will not conduct business in a reasonable manner.

To ensure compliance with the foregoing, the Code requires all persons or entities desiring to contract with the County to execute and file with the purchasing official an affidavit, executed under the pain and penalties of perjury, confirming that person, entity, and any person(s) affiliated with the entity, does not have such a record and is therefore eligible to seek and be awarded business with the County. **Proposer is to complete Attachment "B" and submit with your proposal.**

A.17 LOBBYING

After the issuance of any Request for Proposal, prospective Proposers, or any agent, representative or person acting at the request of such Proposer shall not contact, communicate with or discuss any matter relating in any way to the Request for Proposal with any officer, agent or employee of Manatee County other than the Purchasing Official or as directed in the Request for Proposal. This prohibition includes the act of carbon copying officers, agents or employees of Manatee County on email correspondence. This requirement begins with the issuance of a Request for Proposal, and ends upon execution of the final Contract or when the Proposal has been canceled. Violators of this prohibition shall be subject to sanctions as provided in the Manatee County Purchasing Code of Law Chapter 2-26.

A.18 EQUAL EMPLOYMENT OPPORTUNITY

In accordance with the provisions of Title VI of the Civil Rights Act of 1964 and Title 15, Part 8 of the Code of Federal Regulations, Manatee County hereby notifies all prospective Proposers that they will affirmatively ensure minority business enterprises will be afforded full opportunity to participate in response to this advertisement and will not be discriminated against on the grounds of race, color or national origin in consideration for an award of contract.

A.19 AMERICANS WITH DISABILITIES ACT

The Board of County Commissioners of Manatee County, Florida, does not discriminate upon the basis of any individual's disability status. This non-discrimination policy involves every aspect of the County's functions including one's access to, participation, employment, or treatment in its programs or activities. Anyone requiring reasonable accommodation for the **public meetings** specified herein (i.e. Information Conference or Proposal Opening), should contact the person named on the first page of this document at least twenty four (24) hours in advance of the activity to request accommodations.

END SECTION A

SECTION B: SCOPE OF SERVICES

B.01 DEMOGRAPHICS AND BACKGROUND INFORMATION

The mission of the Manatee County Public Library System (MCPLS) is to: “Nurture imagination, promote lifelong learning, and enrich the community.” The public libraries of Manatee County work together to provide excellent library resources to a growing population of diverse needs that range from local farming communities to vacationing tourists, including a growing Hispanic community and other diverse ethnic communities throughout the county.

MCPLS is governed by the Board of County Commissioners of Manatee County, Neighborhood Services Division, Library Services. Manatee County Government helps guarantee library service to all residents of Manatee County, Florida.

MCPLS consists of 6 public libraries within Manatee County:

Central Library 1301 Barcarrota Boulevard W. Bradenton, FL 34205 (941) 748-5555	Palmetto Library 923 6th Street West Palmetto, FL 34221
Braden River Library 4915 53rd Avenue East Bradenton, FL 34203	Rocky Bluff Library 6750 US Highway 301 North Ellenton, FL 34222
Island Library 5701 Marina Drive Holmes Beach, FL 34217	South Manatee Library 6081 26th Street West Bradenton, FL 34207

The 6 public library locations serve a residential population over 360,000 and a vacation and tourist population. The libraries are located no more than 30 minutes travel time from another library location in the county, and library patrons frequently use more than one library location for their needs.

MCPLS libraries contribute to the following 2013 year-end statistics:

Agency	Borrowers	Items Held	Titles Added	Work-stations	Circulation
Central	34,448	172,200	38,357	28	306,247
Braden River	24,082	83,973	33	10	309,161
Island	6,961	42,279	47	8	107,238
Palmetto Library	7,550	52,374	26	9	94,830
Rocky Bluff	10,385	36,197	10	9	168,272
South Manatee	14,881	70,740	29	9	205,230
Total:	98,307	457,763	38,357	73	1,190,978

An Integrated Library System (ILS) brings library data together that could be accessed by the entire library staff and the community it serves. The basic components of an integrated library system are administration, acquisitions, cataloging, circulation, serials and public catalog. The MCPLS has used the SirsiDynix "Horizon" ILS since 1995. Horizon was first developed and released in 1991, and on March 13, 2007, SirsiDynix announced that it had discontinued development of the Horizon product, but would continue to provide legacy support to existing customers. As where the Horizon product contained the basic components of an ILS, it has become increasingly outdated as development officially stopped and the needs of MCPLS has undergone a radical transformation due to the advent of new technology. Therefore the need for a new ILS system is being driven by the age and cost of the current ILS in use by MCPLS libraries.

Modern ILS systems have moved beyond the basic components model to include such functionality as integrated Web 2.0 and Social Media capabilities, patron centered services such as intuitive discovery layers to access library resources, online bill payment and account handling, support for mobile devices, use of APIs for 3rd party vendor integration such as eBook integration, streaming video & audio resources, Readers Advisory services, and the use of CSS to produce highly configurable rich content. In addition, there are patron cloud-based services, integrated inter-library loan and automatic notification methods all included as components to modern ILS systems. MCPLS seeks to take advantage of modern ILS technology to better serve its community and better meet its ongoing mission statement in a fiscally responsible manner.

The annual cost for software licensing and legacy support for Horizon reached \$44,125 in 2014, and has shown a 5 to 6% annual increase for a product no longer developed. Since development of the Horizon product ended in 2007, Horizon no longer meets MCPLS' current technological needs to fulfill its mission to the community, and has proven to be unable to meet patron service demands for modern library services.

MCPLS believes there is a more cost-effective ILS solution in terms of ongoing support, annual licensing and maintenance while still having a modern product that meets its technological requirements, thus saving money and providing a better product to the staff and the Manatee County community.

MCPLS is seeking to replace the current SirsiDynix Horizon integrated library system (ILS) with computer equipment, software and services required to implement a new, web-based, Cloud Computing SaaS Platform ILS that includes all standard library management functions, which will meet MCPLS' need to manage materials and provide exemplary library services to the public. Due to the diverse and changing needs of the population served, a new web-based, hosted integrated library system (ILS) must be flexible and take advantage of evolving technology.

MCPLS currently employs the SAM Print Public PC and print management system by Comprise at all library locations.

MCPLS uses 3m Self-Checkout units at Central, Rocky Bluff and South Manatee libraries.

MCPLS uses Overdrive for eBooks, OneClick for digital audio, Freegal for streaming video and music, Ebsco Novelist Select for readers advisory, and Library Aware for marketing.

The successful Proposer selected under shall provide both initially and ongoing, the delivery and support for all elements of the new ILS as described in this document, and provide any computer hardware and functional application software and internet connection requirements needed by MCPLS to access and use the system. As the result of a contract award, MCPLS will implement new systems as needed in support of all functions and services identified in this document.

The successful Proposer selected will be responsible for converting existing data, entering that data into the new ILS, providing system testing, training staff, providing detailed system documentation, and remaining available for support and service through the life of the contract between MCPLS and the selected Proposer.

B.02 GENERAL REQUIREMENTS

The new Integrated Library System will include hardware/software to support:

- 1) Systems, the system should:
 - a. Be a hosted, web-based, Cloud Computing SaaS Platform system;
 - b. Utilize Open Relational Database design to support any third party report writer to access data and create custom reports using SQL;
 - c. Utilize standards-based interfaces with a variety of external electronic services and information resources;
 - d. Provide SIP2, NCIP and Z39.50 connection functionality;
 - e. Provide standard admin/root level access to the system;
 - f. Provide functionality for daily full system backups;

- 2) Administration, this module should provide for:
 - a. The ability to modify the system, including system settings, to meet the unique needs of MCPLS;
 - b. The ability to customize the system, including all web generated displays;
 - c. The ability to create, edit and set system limits for optimal system configurations;
 - d. The ability to create, edit and delete system variables such as collection codes, item types, collection rules, etc.;
 - e. The ability to create, edit and delete user and patron accounts, and set limits and rights to such accounts;
 - f. Run and configure system and statistical reports in addition to creating and editing custom reports and report templates using SQL.

- 3) Cataloging, the module should support:
 - a. Standard cataloging methods and authority control;
 - b. The ability to import/export MARC21 and Bib records;
 - c. The ability to create, edit and delete all records;
 - d. The ability to import from OCLC Connexions and other Z39.50 sources;
 - e. The ability to do custom cataloging for local collections;
 - f. The ability to integrate a FAQ File, local community files, and special indexing;
 - g. RDA compliance.

- 4) Acquisitions, the module should have the ability to:
 - a. Have vendor integration and compatibility with book wholesalers such as Baker & Taylor;
 - b. Perform budget management with easy transfer and year-end rollover;
 - c. Import from the catalog to a P.O.;
 - d. Import vendor records;
 - e. Run a report for titles by vendor and titles by budget;
 - f. Use a grid or distribution patterns for orders management;
 - g. Import invoices electronically;
 - h. Do electronic ordering;
 - i. Apply settings for vendor discounts;
 - j. Set up templates for vendor accounts;
 - k. Create work order slips for catalog processing;
 - l. Do batch functions, i.e. cancelling entire groups of orders;
 - m. Do title and non-title invoicing.

- 5) Circulation, the module should provide:
 - a. Intuitive, easy to use screens for standard check-in/check-out functions;
 - b. Inventory control;
 - c. Support for 3M self-checkout machines;
 - d. Ability for mobile circulation and off-line, backup circulation;
 - e. Support the use of RFID technologies;
 - f. Automatic electronic patron notification;
 - g. Debt Collection that includes the capability for patron online bill payment, cash/cashless transactions for debt collection at checkout points, (except self-checkout machines);
 - h. Debit/Credit card e-Commerce functionality.
 - i. Support for financial reporting/account handling;
 - j. Ability to create a hidden branch for "in-house" tracking;
 - k. Ability to transfer holds from one bib to another;
 - l. Multiple indexes for searching patron database;
 - m. Ability to count "in-house" items used by patrons as circulation;

- n. Provide complete statistical reports and information, including the ability to run custom statistical reports using SQL;
- o. Ability for patrons to make online donations.

6) OPAC should provide the following:

- a. Employ easy, single-search discovery that streamlines access to all library physical and electronic material offerings;
- b. Offer an easy, intuitive and rich user experience for adult and children using the online public access catalog, including consolidated gateway/information portal and/or discovery layer to provide access to a wide range of library-provided print, electronic resources and downloadable media;
- c. Provide compatibility and integration by the use of APIs with 3rd party vendor resources such as OverDrive, Freegal, Novelist and others;
- d. Provide the ability to market/advertise and brand library events functions and programs within the gateway/information portal and/or discover layer/OPAC;
- e. Allow for Social Media sharing;
- f. Open system architecture to insure future customization and enhanced functionality of the OPAC;
- g. Patron controlled account management, such as the ability to pay fines and edit account settings;
- h. Highly configurable and adaptive interfaces using HTML5/CSS to meet library needs;
- i. Integration with Web 2.0 based technologies including Social Media, user-generated content such as reviews, blogs, tagging, social bookmarking, wikis and community outreach and involvement capabilities;
- j. User authentication for access to licensed electronic resources;
- k. Have a "Best Seller," "Most Recent," and/or "New Arrivals" type graphical lists to display on the front OPAC page;
- l. Mobile-device-aware PAC website and support for mobile device interaction with the catalog.

7) Inter Library Loan (ILL):

- a. Integrated ILL module/method in the OPAC;
- b. Provide a level of collaboration involving public services and interlibrary loan with OCLC and the Florida Navigator System.

8) Serials and Periodicals:

- a. Serials and continuations management including resource licensing and management for eBooks, ePeriodicals, and other electronic media;
- b. The ability to have non-barcoded serials;
- c. The ability to claim functionality and prediction of next issues.

B.03 TECHNICAL REQUIREMENTS

Technical Requirements are summarized in Attachment C and should be responded to as part of your proposal submission and discussed in Section C, Form of Proposal.

END SECTION B

SECTION C: FORM OF PROPOSAL

This section identifies specific information which must be contained within each proposal. The contents of each proposal shall be **separated** and **arranged with tabs** in the same order as listed in **Sections C.01, through C.03**, identifying the response to each specific item.

The information that you provide shall be used to determine those Proposers with perceived ability to perform the Scope of Services as stated in this Request for Proposal which may overall best meet the needs of Manatee County. A review with those Proposers reasonably susceptible of being selected for award may be conducted for the purposes of clarification of both ability and benefit to Manatee County. See Section D. Selection.

C.01 MINIMUM QUALIFICATIONS (Licensing) TO BE CONSIDERED

To qualify for any consideration, the Proposer(s) must present proof of any licensing or certification which will be required by law to perform the services set out in the scope of services required in this RFP.

Proposals may be presented by a single business entity, a joint venture, or partnership.

Prior to any consideration of the responses to the criteria in this Request for Proposal, Proposers are to document in their Proposals they have the following experience:

MINIMUM EXPERIENCE TO BE CONSIDERED

Proposers shall have substantial, current and verifiable experience in performing or overseeing the performance of the services described within the scope of services set forth herein. In the event more than one entity is joining in making this proposal, each entity shall set forth its respective experience and qualifications for those areas the entity intends to perform.

If subcontractors are to be used in your proposal given to meet the minimum qualifications detail the business entities, description of the service provided, and responses in the same level of detail and tabbed order as instructed in this Request for Proposal for the Proposer.

MINIMUM EXPERIENCE TO BE CONSIDERED (Continued)

To validate experience, expertise and capabilities, Proposers shall provide the following details for each of the Proposer(s)' relevant past performance of similar projects:

- a. Name and location of the Client and the project, the year of performance and the date the project was fully operational and accepted. The specific details of the project including the components and subcontractors utilized.

Specify the name, title and telephone number for the Clients contract manager for the project;

- b. Names of your firm's staff and their direct involvement in the project;
- c. Names and telephone numbers of the persons representing the individual agencies with which the identified key staff directly worked; and
- d. Governmental agency, if any, which verified compliance with its requirements or standards, and the names and telephone numbers of the key persons with direct knowledge of this process to achieve compliance.

After Manatee County staff validates the Minimum Qualifications have been met, those Proposals found to be in compliance will be considered by the evaluation committee.

C.02 ADMINISTRATIVE SUBMITTAL

- a. Proposal Signature Form (Attachment A).
- b. Public Contracting and Environmental Crimes Certification (Attachment B).
- c. Proposal Response to Technical Requirements (Attachment C).

C.03 INFORMATION TO BE SUBMITTED REGARDING PROPOSER(S)

Note: Tabs are required to identify each item defined in this Section.

- C.03.1 Provide a description of each Proposers' **background and size**. Provide a general statement of qualifications to include Proposers' professional credentials, legal status, and experience in providing the service enumerated in this Request for Proposal.

- C.03.2 Proposer shall clearly demonstrate experience and ability. Provide a minimum of five (5) references of systems currently operating as a certified Integrated Library System.
- C.03.3 Provide an **explanation of the Proposers' legal capacity** to perform all parts of the scope of services. Include a description of corporate or other structure and governance, and detail the legal, financial, and technical capabilities of Proposer(s) relevant to performing the scope of services. If more than one Proposer is teaming up to file a proposal, any prior work any two or more joint proposers have done before should be detailed.
- C.03.4 Identify each **principal of the firm and other "key personnel"** who will be professionally associated with the County. Do not include personnel that will not have a key role in providing services. Describe their respective areas of expertise.
- For each identified person, provide the following:
- Full Name
 - Title
 - Professional credentials
 - Area of expertise, individual's roles and duties in providing services
 - Office address
 - Email address
 - Telephone number
 - Personalized resumes which identify the qualifications, training and experience of each key personnel
- C.03.5 Disclose **any ownership interest in other entities** involved in these services which might reasonably be selected to perform work under the scope of services set forth in this Request for Proposal. This ownership disclosure shall be included, whether such ownership occurs by the Proposer through a parent, subsidiary or holding company or any other form of business entity. Submit entity names and the percent of ownership for each.
- C.03.6 Submit a **manning level statement** for your organization, detailing how many total employees work for your firm at any one time, including temporary and part-time employees. List the ratio of full-time employees to part-time, and temporary employees. Also include a **subcontractor plan** detailing how subcontractors will be used.
- C.03.7 **Provide authorization for a Manatee County auditor and/or financial analysts to have access to your financial records at the primary location of the business entity** explained in response to item C.03.3, or such other location as may be agreed, for the purposes of verifying your financial representations, review and assessment of the historical and current financial capacity of your business entity and its expected ability to meet ongoing financial obligations to the County as proposed in this

proposal to Manatee County. The County's audit and /or financial analyst agents will report their findings in a summary report to the Manatee County Purchasing Official, which will be placed in the proposal files for subsequent use and review.

C.03.8 The Proposer shall provide a narrative overview of the capabilities of the Integrated Library System and how the system will meet each specification.

Please respond to the following questions:

- a. What are the base requirements for a PC to work with the proposed system? Include with your response what type of operating system, processor, amount of memory, and hard disk space needed. Are these desktop requirements the same regardless of module to be used? What type and speed of Internet connection will properly access the system?
- b. MCPLS libraries use a wide variety of laser scanners, thermal printers, label printers, receipt printers, and laser printers, etc. Please define any categories of such peripherals that will not work with the proposed system.
- c. Is there a software client to be loaded on library computers to run the ILS? Are there different clients for different modules?
- d. Can you describe the upgrade cycle for your product, costs for such upgrades, and customization costs, fees, or structures of costs for such services?
- e. Please describe your Customer Support structure in place and hours of operations:
- f. How is Inter-library loan (ILL) handled in your product?
- g. Describe the various elements of your security structure, such as account or login/passwords, user profiles, and task or function passwords.
- h. Describe your approach to user accounts on the system. Do you recommend individual specific accounts or generic group/module users?
- i. What is the permission/rights structure of the system?
- j. How is the system backed-up? How often? Where is data stored?
- k. Encryption?
- l. Please describe your disaster preparedness and plans?

- m. Does your system provide an auditing trail for all access made to the system? If so, what types and how long is the information kept?
- n. As an example of flexibility, the system must allow the ability to search on multiple indexes such as name, telephone, address, email, etc., to the Patron database with the ability to choose the sorting method to control the sort order so that names like McAdams and MacAdams can either sort together or separately, according to local preference. Can your system provide this functionality? If so, how?
- o. As still another example of flexibility, the system must provide a wide variety of use statistics. Much of funding is based on library use statistics, so these statistics must be exact, correct, easily understood, and constantly updated. Please specify how many patron statistical categories that can be attached to each patron record. Please also specify how your system tracks and reports transactions at all locations, by users of all libraries, including inter-/intra-library loans (among different libraries). Please also describe the "canned" reports and availability of statistics to all library staff.
- p. At the end of the day, staff picks up books laying around on various tables and surfaces and checks them in. Does your system provide the ability to have "in-house" or "hidden branch" categories for statistical purposes so checked in items can be counted for circulation.
- q. Please describe how your system can export statistical data?
- r. MCPLS is particularly interested in how statistics and rules are applied when patrons access the ILS from home. For example, how are renewals counted? To which agency(-ies) are renewals credited when patrons log in from home? Are first-time circulations counted separately from renewals?
- s. MCPLS libraries also have local barcodes for statistical purposes only, such as one barcode number for all paperback books. A patron checking out 5 books will have only one barcode scanned and the number of books typed in at circulation. Can your system provide this functionality? Please explain how your system handles "statistic only" categories?
- t. Point-of-Sale/e-Commerce is important to the convenience of use for our library customers. Please describe how POS is handled at the circulation counter with your system. Does it work with a cash drawer or is a cash register needed? How are debit/credit cards handled? Are there extra costs/charges associated with this service?

- u. Describe how e-Commerce is handled by your system via the website for the ability to pay fines outside the library. Are there extra costs and charges associated with this service?
 - v. Currently installed in three libraries are 3M self-checkout machines. All self-checkout machines also have the capability to collect fines and payments. Please describe any one-time or ongoing charges associated with transitioning this self-checkout machine to the proposed system.
 - w. As described in the above sections, MCPLS' current SirsiDynix Horizon system has hundreds of thousands of existing database records that need to be migrated intact into any new system. Bibliographic records, authority records, item records, patron records, transaction records, hold records, fine records, overdue records, lost records, order records, historical statistical records, and other records will all need to be converted from their current format into a corresponding format in the new ILS. Please describe your history converting and migrating records from SirsiDynix Horizon to your ILS.
 - x. Please describe any special situations, circumstances, or pitfalls we may need to be aware of as we contemplate migrating our database records to your ILS.
 - y. Please describe any difficulties you have had migrating SirsiDynix data in the past and how you addressed those difficulties.
 - z. Please describe on-site and/or off-site training offered by your organization and the costs associated/incurred by MCPLS for such training.
 - aa. Please submit a list of recent SirsiDynix conversions your company has completed, especially noting public library consortia of similar size and volume of business.
- C.03.9 Provide your **proposed cost** for the required hardware, software, installation (travel and per diem), training, maintenance and system upgrades in accordance with the requirements stated in the Scope of Service. Include any additional items that you foresee being needed during the performance of this project.
- C.03.10 Include a statement of qualifications that includes Proposer's credentials and experience in providing, operating and maintaining these systems.
- C.03.11 Submit any other additional information which would assist the County in the evaluation of your proposal. It is recognized that this Request for Proposals does not identify every possible feature that would be of benefit to MCPLS. Thus, Proposer's are encouraged to identify problems,

solutions, enhancements or any additional features which would be of benefit to MCPLS, and pertinent to their proposals.

END SECTION C

SECTION D: SELECTION

D.01 EVALUATION FACTORS

Evaluation of proposals will be conducted by an evaluation committee. The committee's goal will be to identify the proposal which will overall best meet the needs of Manatee County as determined from the proposals received and subsequent investigation by the County. General factors to be applied will be: (1) the perceived ability of the Proposer(s) to perform the Scope of Services as stated in this Request for Proposal in the most timely and efficient manner possible, (2) the legal, technical and financial capabilities of Proposer(s), and (3) the experience of Proposer(s).

These evaluation factors shall determine the successful proposal.

D.02 RELATIVE IMPORTANCE OF EVALUATION FACTORS

Unless noted, no weight will be assigned to the Evaluation Factors stated above.

D.03 PRELIMINARY RANKING

An evaluation committee shall determine from the responses to this Request for Proposal and subsequent investigation as necessary, the Proposer(s) most qualified to be selected to negotiate an agreement.

D.04 REVIEW OF PROPOSERS AND PROPOSALS

In-person reviews may be conducted with responsible Proposers who are deemed reasonably susceptible of being selected for award, for the purposes of assuring full understanding of: (a) conformance to the solicitation requirements, (b) the abilities of the Proposer, and (c) the proposal submitted.

Proposers shall be available for presentations to and interviews with the evaluation committee, upon reasonable notification from the Purchasing Division. The date(s) and time(s) of any such presentations / interviews shall be determined solely by the County, and may be closed to the public in the discretion of the Purchasing Official, and to the extent permitted by law.

D.05 SELECTION FOR NEGOTIATION

The evaluation committee will make a recommendation to the County Administrator as to the proposer which the County should enter into negotiations. The County Administrator will act upon that recommendation and, if accepted, the successful Proposer will be invited to enter negotiations led by the Purchasing Division.

D.06 AWARD

Award of an agreement is subject to the successful negotiations and the approval of either the County Administrator or the Board of County Commissioners (as provided for in the current Purchasing Code and Procurement Procedures).

END SECTION D

SECTION E: NEGOTIATION OF THE AGREEMENT

E.01 GENERAL

The following general terms and conditions apply to the proposal submitted for consideration and the subsequent negotiations:

- a. The proposal will serve as a basis for negotiating an agreement, but not compel adherence to its terms or conditions.
- b. Upon submission, all proposals become the property of the County which has the right to use any or all ideas presented in any proposal submitted in response to this Request for Proposal whether or not the proposal is accepted.
- c. All products and papers produced in the course of this engagement become the property of the County upon termination or completion of the engagement.

E.02 AGREEMENT

The selected Proposer shall be required to negotiate an agreement, in a form and with provisions acceptable to Manatee County.

Negotiated Agreements may or may not include all elements of this RFP or the resulting successful proposal where alternative terms or conditions become more desirable to the County, and the parties agree to such terms.

The parties will negotiate the term of the agreement, and the circumstances in which it may be renewed, assigned or terminated.

The parties will negotiate matters of insurance, liability, record-keeping, auditing, and all other relevant contractual matters.

END SECTION E

ATTACHMENT A
PROPOSAL SIGNATURE FORM
RFP #15-0166FL

The undersigned represents that by signing the proposal, that he/she has the authority and approval of the legal entity purporting to submit the proposal, and that all of the facts and responses set forth in the proposal are true and correct. If the proposer is selected by the County to negotiate an agreement, the undersigned certifies that the proposer's negotiators will negotiate in good faith to establish an agreement to provide the services described in the Scope of Services of this Request for Proposal.

Print or Type Proposer's Information Below:

Name of Proposer

Telephone Number

Street Address

Email Address

Web Address

Print Name & Title of Authorized Officer

Signature of Authorized Officer

Date Signed

Acknowledge Addendum No. _____ Dated: _____
Acknowledge Addendum No. _____ Dated: _____
Acknowledge Addendum No. _____ Dated: _____

ATTACHMENT B

PUBLIC CONTRACTING AND ENVIRONMENTAL CRIMES CERTIFICATION

SWORN STATEMENT PURSUANT TO ARTICLE V, MANATEE COUNTY PURCHASING CODE

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the Manatee County Board of County Commissioners by _____
[print individual's name and title]

_____ For _____
[name of entity submitting sworn statement]

whose business address is: _____

and (if applicable) its Federal Employer Identification Number (FEIN) is _____. If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement:

I understand that no person or entity shall be awarded or receive a county contract for public improvements, procurement of goods or services (including professional services) or a county lease, franchise, concession or management agreement, or shall receive a grant of county monies unless such person or entity has submitted a written certification to the County that it has not:

(1) been convicted of bribery or attempting to bribe a public officer or employee of Manatee County, the State of Florida, or any other public entity, including, but not limited to the Government of the United States, any state, or any local government authority in the United States, in that officer's or employee's official capacity; or

(2) been convicted of an agreement or collusion among bidders or prospective bidders in restraint of freedom of competition, by agreement to bid a fixed price, or otherwise; or

(3) been convicted of a violation of an environmental law that, in the sole opinion of the County's Purchasing Director, reflects negatively upon the ability of the person or entity to conduct business in a responsible manner; or

(4) made an admission of guilt of such conduct described in items (1), (2) or (3) above, which is a matter of record, but has not been prosecuted for such conduct, or has made an admission of guilt of such conduct, which is a matter of record, pursuant to formal prosecution. An admission of guilt shall be construed to include a plea of nolo contendere; or

(5) where an officer, official, agent or employee of a business entity has been convicted of or has admitted guilt to any of the crimes set forth above on behalf of such and entity and pursuant to the direction or authorization of an official thereof (including the person committing the offense, if he is an official of the business entity), the business shall be chargeable with the conduct herein above set forth. A business entity shall be chargeable with the conduct of an affiliated entity, whether wholly owned, partially owned, or one which has common ownership or a common Board of Directors.

For purposes of this Form, business entities are affiliated if, directly or indirectly, one business entity controls or has the power to control another business entity, or if an individual or group of individuals controls or has the power to control both entities. Indicia of control shall include, without limitation, interlocking management or ownership, identity of interests amount family members, shared organization of a business entity following the ineligibility of a business entity

under this Article, or using substantially the same management, ownership or principles as the ineligible entity.

Any person or entity who claims that this Article is inapplicable to him/her/it because a conviction or judgment has been reversed by a court of competent jurisdiction, shall prove the same with documentation satisfactory to the County's Purchasing Director. Upon presentation of such satisfactory proof, the person or entity shall be allowed to contract with the County.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR MANATEE COUNTY IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE CONTRACTING OFFICER OR THE COUNTY ADMINISTRATOR DETERMINES THAT **SUCH PERSON OR ENTITY HAS MADE FALSE CERTIFICATION.**

[Signature]

STATE OF FLORIDA
COUNTY OF _____

Sworn to and subscribed before me this _____ day of _____, 200____ by _____.

Personally known _____ OR Produced identification _____
[Type of identification]

Notary Public Signature My commission expires _____.

[Print, type or stamp Commissioned name of Notary Public]

Signatory Requirement - In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a corporation, this affidavit shall be executed by the corporate president.

ATTACHMENT "C"

PROPOSER'S RESPONSE TO TECHNICAL REQUIREMENTS

Itemized questions Proposer shall respond with a checkmark in the appropriate response as follows:

Y = Yes, currently available in general release

D = In Development, vendor will deliver by April 1, 2015

F = Future development, not available for delivery by April 1, 2015

Please use the Comments space to explain **briefly** your response, if necessary.

General requirements for the new ILS are stipulated to include these features:

Item #	Description	Y	D	F	Comments
3.1.1	Web-based, hosted patron, bibliographic, and item database.				
3.1.2	Support the ability for each independent library to collect its own statistics and secure its own data from access by other agencies.				
3.1.3	Support for all patron and staff functions to operate and be maintained in a graphical user interface, including all data elements in all databases.				
3.1.4	Support global edits and changes to all data elements, including fund accounts, in-process items, authorities, index headings, call numbers, and others.				
3.1.5	Support for library standards: SIP and SIP2.				
3.1.6	Support for library standard: Z39.83 (NCIP)				
3.1.7	Support for library standard: Z39.50 (Federated Searching)				
3.1.8	System provides security auditing tools. Describe.				
3.1.9	Vendor has implemented				

	database vulnerability assessment, data-at-rest encryption, intrusion detection, and in-depth auditing.				
3.1.10	System provides e-Commerce /secure e-Payment options for patrons.				
3.1.11	Provide off-site staff client access.				

B.3.2 SYSTEM SECURITY

Item #	Description	Y	D	F	Comments
3.2.1	Support for daily encrypted backups.				
3.2.2	Support for auditing trail for all access made to the system, e.g., tracking hacker attempts.				
3.2.3	Disaster Preparedness Plan.				
3.2.4	Data backup redundancy.				

B.3.3 HOLDS

Item #	Description	Y	D	F	Comments
3.3.1	Support for the ability to customize the sequences in which the holdings of other libraries are "preferred" in filling hold requests.				
3.3.2	Support for the ability to search the pickup location first when filling holds placed remotely, then use that agency's preferred hold list.				
3.3.3	Holds function is fully automated with no staff intervention required.				
3.3.4	Support for patrons to easily place title-level holds.				
3.3.5	Support for patrons to easily place item-level holds.				
3.3.6	Support for patrons to easily				

	place volume-level holds.				
3.3.7	Support for patrons to make holds active or inactive without losing their place in the hold queue.				
3.3.8	Support for staff to “shuffle” the hold queue.				
3.3.9	Support for sorting and printing pick-lists in any order.				
3.3.10	Support for hold notices to be automatically sent electronically via E-mail or E-Mail to Text as selected by the patron.				
3.3.11	Support for varying lengths of time items sit on holds shelves, e.g., by owning library, by item type, by format, etc.				
3.3.12	Support for placing multiple holds and specifying the order in which patrons want titles to come in.				
3.3.13	Weight the hold queue based on the courier delivery schedule.				
3.3.14	Ability to exclude patrons from the Pick list based on library defined criteria such as “Patron want no notifications.”				
3.3.15	Ability to weight the Holds queue.				
3.3.16	Ability to merge holds lists on 2 separate bibs into one.				

B.3.4 PUBLIC ACCESS CATALOG (PAC) / INFORMATION PORTAL

Item #	Description	Y	D	F	Comments
3.4.1	Display the call number of items on the 1 st search results screen.				
3.4.2	Support for displaying all member library holdings on the first copy-display screen, with the home-library’s copies displaying first.				

3.4.3	Support for limiting searches to "local" and/or "available" copies only.				
3.4.4	Support for suggestions for misspellings and alternate positioning of author names.				
3.4.5	Support for creating "synonym tables" of commonly misspelled words.				
3.4.6	Support for the ability to place a hold and then return to a sorted search list.				
3.4.7	Support for limiting by any data element in the MARC record, the item record, or the circulation record.				
3.4.8	Support for limiting by multiple factors.				
3.4.9	Support for web-standard searching syntax: use of quotation marks, truncation symbols.				
3.4.10	Support for exporting search results, both for printing, texting or E-mailing.				
3.4.11	Support for access to patron's own borrower account.				
3.4.12	Support for multiple languages in PAC interface (esp. Spanish)				
3.4.13	Support for ADA compliance, both in terms of input and output.				
3.4.14	Support for ability to create special interest profiles or RSS lists that automatically E-mail patrons when items matching their criteria are added to the system.				
3.4.15	Support for library-by-library customization of copy sort and display order.				
3.4.16	Support for displaying an appropriate graphic icon (book, DVD, etc.) at the display of brief bib level. This display is based on				

	data in a MCPLS' local custom 910 MARC tag.				
3.4.17	Browse by book jackets and shelf lists.				
3.4.18	Limit searches by different format types.				
3.4.19	Make use of API's to extend integration and functionality of the PAC.				
3.4.20	Responsive web design that automatically scales to resolution/screen size of the mobile device viewing the site.				
3.4.21	"Mobile Aware" PAC that adjusts for mobile devices such as smart phones, tablets, etc.				
3.4.22	Ability for librarians to save searches and create lists of searches for display in the PAC.				
3.4.23	Perform federated/power searches, such as searching the catalog, database products, calendar, community information and other web resources.				
3.4.24	Ability to aggregate and display RSS feeds for material types, new books, search lists, etc.				
3.4.25	Display book covers, jackets, integrating 3 party resources to display graphical representations of material types.				
3.4.26	Novelist content integration.				
3.4.27	Ability to exclude searches and limit searches by a variety of item types, collection codes, etc.				
3.4.28	PAC default to keyword searches.				
3.4.29	Search results screen returns material at borrower's branch location first.				
3.4.30	Ability to view items in a				

	search by series, i.e. the Harry Potter Series, to see which book followed the next in a series.				
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B.3.5 CIRCULATION

Item #	Description	Y	D	F	Comments
3.5.1	Support for linking guardian's and minor's library cards or "family cards."				
3.5.2	Support for duplicate patron checking when registering borrowers: phone number, birth date, name, and other identifiers.				
3.5.3	Support for batch patron record management: error checking, purging, group/batch updating of any/all fields in patron records.				
3.5.4	Support for flexibility in how much/little can be kept in patron history, and for how long.				
3.5.5	Support for going directly to bib record from the patron's list of items out.				
3.5.6	Support for self-checkout systems.				
3.5.7	Support for records being in use at multiple workstations without locking those workstations.				
3.5.8	Support of local control of patron records.				
3.5.9	Support for a history of notices sent, with dates and times, to patrons in the patron record.				
3.5.10	Support for running individual notices.				
3.5.11	Limit patron access by groups to certain materials such as explicit material?				
3.5.12	Provide extended loan periods for certain materials				

	such as larger books?				
3.5.13	Provide "Fast-Add" creation for materials that had been misfiled so Circulation could quickly add a record to fulfill the circulation request.				
3.5.14	Debt collect and/or make donations to the library via e-Commerce/POS.				
3.5.15	Does your system work with Unique Management for debt collection?				
3.5.16	Provide staff-mediated Patron self-registration online through the OPAC/Website.				
3.5.17	Bluetooth scanning for Circulation functions.				
3.5.18	Able to delete multiple patron blocks at one time without having to go into each block to delete it.				
3.5.19	Show the author and barcode # in a patron's request list and expired holds.				
3.5.20	Show a patron's most recent check-ins.				
3.5.21	Renew expired holds without having to "start over" in the catalog, i.e. have a renew option while viewing holds.				
3.5.22	View items on request, including collection/call number, in a patron's record, rather than just showing the titles.				
3.5.23	Ability to sort a patron's "all items out" by title, due date or item type.				

B.3.6 BACKUP CIRCULATION

Item #	Description	Y	D	F	Comments
3.6.1	Support for an offline backup circulation system that date- and time-stamps each transaction so that				

	each transaction uploaded will occur in proper sequence.				
3.6.2	Support for hand-held scanning devices in backup circulation mode.				

B.3.7 SELF-CHECKOUT

Item #	Description	Y	D	F	Comments
3.7.1	Support for 3M self-checkout systems.				

B.3.8 CATALOGING

Item #	Description	Y	D	F	Comments
3.8.1	Support for use statistics in the item record; lifetime use and current-period use.				
3.8.2	Support for use statistics in the bib record; lifetime use and current-period use.				
3.8.4	Support for full-screen editing, with input validation for tags, indicators, fields, and subfields.				
3.8.5	Support for global search-and-replace in bib and authority records at both the MARC tag and the subfield level.				
3.8.6	Support for retention of local content when locally-modified record is merged with national record.				
3.8.7	Support for call number searching, and then limiting by owning library for the effect of a library shelf-list index.				
3.8.8	Support for the item record to contain: call number, owning agency, circulating agency, copy number, status, purchase price, notes, loan period, date added, date modified, date last touched, date last				

	circulated, medium.				
3.8.9	Support for ability to change batches of item records, e.g., delete them, change owning agency, call numbers, or other variables in the item record.				
3.8.10	Support for adherence to NISO standard Z39.71-2006, Holdings Statements for Bibliographic Items.				
3.8.11	Support for importing and exporting records in MARC or other standard formats from OCLC Connexions client.				
3.8.12	Reporting function that maps which MARC tags are being picked up by a particular search terms so staff can make sure all tags are being included.				
3.8.13	Support for the integration of Web-Dewey.				
3.8.14	Support for RDA standards.				

B.3.9 REPORTS & STATISTICS

Item #	Description	Y	D	F	Comments
3.9.1	Statistics and reporting capability that counts and can list new bib records added to and deleted from the database, sortable by owning library, collection, call number, status, or any other bib- or item-level detail.				
3.9.2	Ability to operate the Report Generator in real-time mode without degrading system performance.				
3.9.3	Ability to extract statistical information from any module or modules simultaneously.				
3.9.4	System can collect and retain statistical information and counts of usage by all				

	categories of all possible database items, for any length of time, for the purpose of comparison and for usage trend analysis.				
3.9.5	Support for accurate statistics in bib, item, and patron database maintenance; for example, the ability to count and list records by date added, by date deleted, by and by last activity, i.e. last time record was edited.				
3.9.6	Support for the ability to write a report template and give others the ability to run it.				
3.9.7	Support for an unlimited number of report templates.				
3.9.8	Support the use of SQL for report generation and modification.				

B.3.10 MIGRATION SERVICES & TRAINING

Item #	Description	Y	D	F	Comments
3.10.1	Experience converting Horizon SirsiDynix database records with no loss of information.				
3.10.2	Support for record normalization procedures during the migration process.				
3.10.3	Support for consulting assistance during the parameter profiling of the new ILS.				
3.10.4	Vendor offers train-the-trainer training for library staff on-site or off-site.				
3.10.5	Vendor offers online/web-based training modules.				
3.10.6	Vendor offers video training modules.				
3.10.7	Vendor offers on-site training for all modules for staff of member libraries.				

	Please note standard costs.				
3.10.8	Vendor offers locally-customizable training materials and/or templates of materials.				