



QUEENS PUBLIC LIBRARY

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RFP # 0819-1

**Request for Proposals for
Next Generation Integrated Library System**

Date: August 23, 2019

Revised: 9/19/2019

Proposals must be submitted by 3:00 PM:

October 10, 2019

**Procurement Department
Queens Borough Public Library
89-11 Merrick Boulevard
Jamaica, New York 11432**

TABLE OF CONTENTS

I. CALENDAR OF EVENTS3

II. CONTACT INFORMATION.....3

III. CONTRACT PERIOD.....4

IV. BACKGROUND4

V. SCOPE OF SERVICES13

VI. THRESHOLD CRITERIA14

VII. PROPOSAL REQUIREMENTS14

 A. Management & Qualification15

 B. Response to Scope of Services.....17

 C. Other.....17

VIII. EVALUATION AND SELECTION17

 A. Evaluation Criteria17

 B. Selection Process18

IX. PROPOSAL CONDITIONS AND INSTRUCTIONS19

 A. Limitations19

 B. Proposal Submission.....19

 C. Administrative Specifications20

 D. Addendum, Errors and Omissions20

 E. Debriefing of Unsuccessful Proposers.....20

The following documents are incorporated into this RFP-

Attachment 1- Forms

Attachment 2- Queens Borough Public Library General Terms and Conditions

Attachment 3- Local Law 34

Scope of Services Documents:

 Requirements

 Costs

 Appendix A

The Queens Borough Public Library (the “Library”), hereby solicits proposals from experienced firms and individuals (hereinafter referred to as “Proposers”) in response to this Request for Proposals (“RFP”) to enter into a contract for a Next Generation Integrated Library System (“NGILS”) as further described throughout this RFP. The Library intends to award a contract to one proposer.

Proposers responding to this RFP may submit more than one proposal. Proposers are not to provide a single proposal with multiple options. For example if a firm has multiple configuration capabilities such as an on premise solution, software as a service solution or a hybrid solution, proposer is to submit a separate and distinct proposal for each configuration. Proposers are not to provide a base proposal with options to increase costs. Instead, proposers are to reflect its maximum pricing.

I. CALENDAR OF EVENTS

Issuance of RFP	August 23, 2019
Deadline for Questions	September 23, 2019
Proposal Due Date	October 10, 2019
Interviews and Product Demonstrations	The Library anticipates this to occur January or February 2020 and it is to be scheduled with selected proposers.
Award/ and Notification to all Proposers	At the conclusion of the RFP process.

II. CONTACT INFORMATION

The Library’s designated contacts for this RFP, as of the date hereof, are Cristina Polychronopoulos, Procurement Coordinator, (718)-990-8684, Xavier Cerda, Assistant Director of Procurement (718)-990-0783 and William Funk, Director of Procurement, (718)-990-0782. Questions regarding this RFP should be sent to: RFPcontact@queenslibrary.org on or before September 23, 2019. Responses to any questions received will be posted on the Library’s web site at <https://www.queenslibrary.org/about-us/procurement-opportunities> as they are received. No other communication of questions and answers will be made.

Two (2) hard copies of your technical and cost proposals and a CD or a flash drive or similar device that contains your proposals in either Microsoft Word or PDF format are due no later than **3:00 p.m. on October 10, 2019**, in a sealed package or packages. Each submitted package should be marked clearly on its exterior that it is in response to ILS RFP # 0819-1. All proposals should be delivered to:

Queens Public Library
Procurement Department
89-11 Merrick Blvd
Jamaica, NY 11432

The Library will not consider any proposals that are faxed or e-mailed, whenever received, and will not consider any proposal received after the Proposal Due Date. **Failure to submit proposals on time will not be waived by the Library under any circumstances (e.g., traffic conditions, mail or courier failure, etc.).**

The Library will not provide reimbursement for any costs or expenses incurred in connection with this RFP, including the costs of preparing and submitting a response, providing any additional information or attending an interview. All material that is submitted in response to this RFP will become the sole property of the Library. The Library expressly reserves the right to utilize any and all ideas submitted in the proposals received unless covered by legal patent or proprietary rights, any of which **must** be clearly indicated in the proposal submitted in response to the RFP.

Interviews and product demonstrations of the top-qualifying Proposers may be conducted at the Library's discretion on a specific day or days to be disclosed later in the RFP process. All top-qualifying Proposers will be notified of the exact interview date(s) in advance. The Library anticipates that the interviews and product demonstrations to occur in January and February 2020. The Library reserves the right to schedule interviews and product demonstrations at earlier or later months.

III. CONTRACT PERIOD

The term of the awarded contract will be for a (5) five-year period with (2) two (5) five-year options to renew at the Library's sole discretion. The Library may terminate the contract at any time, in its sole discretion, upon written notice.

IV. BACKGROUND

The Library is an independent not-for-profit corporation. It is one of the largest and most innovative libraries in the world and one of the three New York City library systems. The Library consists of a Central Library and other facilities located throughout the County of Queens in the State of New York. For a complete listing of current facilities, please visit the Library's webpage: <https://www.queenslibrary.org/about-us/locations/?view=all>

The Queens Borough Public Library ("the Library") serves 2.3 million Queens residents, with an extensive collection of books, reference materials, periodicals, government documents, video and

audiocassettes, records, compact discs, DVDs, and photographs and maps. The Library has a computerized integrated circulation and catalog system, state-of-the-art computer equipment in all community libraries, and the ability to provide information through free Internet access and facsimile machines to the public. The Library offers a wide variety of reading, writing, and literacy programs, and functions as an integral part of the Queens community.

The following is information regarding the Library’s system and usage details during 2018 as well as the current Virtua ILS and technology environment.

TABLE 1-1	
KEY STATISTICS IN CALENDAR YEAR 2018	
CY 2018	Rounded
CIRCULATION	
Circulation (total)	12 million
• Electronic circulation	1.2 million
• Check outs (physical items)	7 million
• Renewals (in person)	740,000
• Renewals (online)	2.8 million
• Renewals (phone)	270,000
Check ins (total)	11 million
• Sorters	8.2 million
• Self-Check out stations	1.7 million
• Virtua client	1.1 million
REQUESTS	
Added requests	1 million
Deleted requests	230,000
Denied requests	100,000
Modified requests	20,000
PAYMENTS (transaction counts)	
Payments (total count)	200,000
• Cash	130,000
• Credit card (in person)	50,000
• Credit card (online)	15,000
• Check	1,000

TABLE 1-1	
KEY STATISTICS IN CALENDAR YEAR 2018	
CUSTOMER SERVICE	
In-person attendance	11 million
Reference queries	2.7 million
PROGRAMS	
Programs	90,000
Program attendance	1.6 million
HOLDINGS	
Bibliographic records	1.4 million
Items (physical)	5.2 million
Items (electronic)	70,000
Items added (physical)	500,000
Items added (electronic)	7,500
TECHNOLOGY	
Computer sessions	2.8 million
Website visits	6.9 million
Wi-Fi sessions	450,000
PCs (total)	2,700
• Staff	1,600
• Customers	1,100
Laptops (total)	400
• Staff	150
• Customers	250
Tablets	3,000
Mobile Hotspots	2,000
Smartphones (staff)	300
CUSTOMERS	
Customers	1.5 million
New registrations	90,000
THIRD PARTY RESOURCES	
Databases, electronic collections and resources	50

TABLE 1-1	
KEY STATISTICS IN CALENDAR YEAR 2018	
NOTICES	
Notices (total)	6.6 million
• Availability letter	750,000
• Bill issued	115,000
• Expired requests letter	110,000
• Overdue notice issued	265,000
• Customer account statement	40,000
• Review notice issued	5.3 million

1.2 VIRTUA INTEGRATED LIBRARY SYSTEM AND TECHNOLOGY ENVIRONMENT

See Appendix A for details regarding the Library’s current practices.

VIRTUA ILS

The Library uses Virtua as its integrated library system (“ILS”). The Library originally licensed Virtua from VTLS that was subsequently acquired by Innovative Interfaces, Inc. (III). The following are details regarding the current status of the ILS:

- The Library currently operates Virtua 16.0.
- The Library operates Virtua on on-premise servers
- Virtua is licensed with unlimited staff and public access users
- The Library commissioned heavy customization of Virtua from VTLS
- Virtua was last upgraded in May 2018
- Replacement of Virtua is planned for 2020/2021

The Library utilizes the following Virtua modules:

- Circulation
- Cataloging
- Serials (Partially)
- Online catalog (IT only)
- Ad Hoc reports against views using Crystal Reports; SAP Business Warehouse BW;
- Infostation: reporting application used to schedule and run reports, used for notifications like request availability, overdue fines, billed items, unique management, etc.
- Solr (Solr indexes are also used for website’s search functionality)
- APIs (used for discovery and online customer account access)
- SIP 2 that is used for self-check-in, self-check-out, computer reservation system and more
- The Library uses multiple third-party add-on products and services with Virtua

The following ILS components are not used or not available:

- Discovery Service (ITD only uses the discovery services)
- ERM (Electronic Resource Management)
- Federated Searching Service
- e-book management
- Acquisitions Module

WEBSITES

The Library developed the discovery layer using Drupal; Virtua's APIs and Solr provide search capabilities for the catalog, programs, blogs, and online access to customer accounts.

Through the online "My Account" portal, customers may renew or request physical materials and change their PIN.

Electronic content (eContent) may only be checked out directly from third party vendor sites or applications. There is no 'true' integration with the ILS to capture these transactions.

Using the online customer registration function, new customers may register for a library account by filling out and submitting a form. An 'E-User' account is created immediately; a barcode and PIN are emailed to the customer within minutes. This provides immediate access to all eContent; to obtain full borrowing privileges, the customer must visit a Queens Public Library location in person to verify their information.

MOBILE (iPhone and Android app) AND TABLET APPLICATIONS

The iPhone and Android applications are built on a single code base in Appcelerator platform and also share code for certain areas with the tablet. Initial development was done in conjunction with an external vendor and is now completed by an internal resource.

Mobile (iPhone and Android app)

Queens Public Library developed its own mobile application to provide customers with an alternative to the mobile website. Customers have access to all My Account functionality, locations, library events (including registration), search (including placing requests), and streamlines access to eContent providers (such as Overdrive, Baker & Taylor Axis360, Freegal, RB Digital). The Library app recognizes if the eContent provider's app is installed and will open a download seamlessly or prompt them to go to the app store to download.

Tablet

Google donated 5,000 Nexus 7 tablets to the Library after Hurricane Sandy to be lent to library customers in impacted areas. The tablet is pre-installed with a Queens Public Library application that allows the customer to experience a wide range of library services both with and without access to Wi-Fi. Mobile device management prevents customers from exiting the app. The project has now expanded throughout the borough with new Samsung tablets.

Customers have access to all My Account functionality, locations, library events (including registration), search (including placing requests), eContent providers (Overdrive, Baker & Taylor Axis360, Freegal, RB Digital), and a curated experience from various Queens Public Library services. Customers can browse eContent on the Library app and download seamlessly to the partner app. Customers can also open the partner apps directly to return to previously downloaded material.

Data caches at regular intervals so when the tablet is offline customers still have access to recent content. Also, there is an internet browser that customers are able to use while on Wi-Fi.

SAP AND ACQUISITIONS OF LIBRARY MATERIALS AND RESOURCES

The Library does not utilize an ILS Acquisitions module and relies upon various uses of SAP in Acquisitions selection, ordering, and payment.

The Library utilizes SAP for Acquisitions ordering functions for central and non-central purchases. Files with order information are downloaded from vendor sites, processed, uploaded into SAP, and transmitted to vendors via EDI; materials arrive with invoices and are manually confirmed in SAP by a centralized Preparations department.

The Library has extensive decentralization of acquisitions, half of the overall materials budget is divided among the 63 branches to select and order independently online using the vendors' websites like Ingram, Baker & Taylor, and Midwest Tape; invoices are manually entered into SAP upon receipt at Preparations.

There are separate Selection and Acquisitions operations and different practices for:

- Central Library
- Collection Development Department (CDD)
- Mail-A-Book (Homebound services)
- New Americans Program (NAP)
- Programs and Services Department (PSD)/J and PSD/YA
- Branches
- Flushing Library
- Adult Learning Centers (ALC)

RFID/SELF CHECK OUT

The Library conducted a procurement approximately fifteen years ago for a self-checkout system and selected a NGILS that uses RFID technology, then replaced the solution's software several years ago to improve performance and to better integrate with Library systems.

The existing self-checkout machines are desktop modules that offer variety of functions. The library utilized SIP2 and APIs, provided by the current ILS vendor, to communicate with the current ILS system (Virtua).

The Library is currently conducting a procurement to replace the self-checkout machines with newer models, including kiosks, with the expectation that hardware and software will be changed before the NGILS is implemented.

SORTING/SELF CHECK-IN SYSTEMS

The Library uses Lyngsoe Systems for the self-check-in and sorting system. Each branch has a sorting system; the smallest has only one bin while the largest has 15. Some locations have both internal and external book drops, while others have only an internal system. The external book drop operates 24 hours a day. The library uses SIP2 for the check-in system.

LAMPS

The Library uses an application developed in-house for all aspects of program creation and management; it also facilitates the marketing workflow for materials associated with programs as well as all other print materials (e.g., business cards). The application has varying levels of integration with the ILS, SAP, and the Queens Public Library website and mobile apps.

PC MANAGEMENT AND FILTERING

The Library uses SAM to manage PCs. SAM, with the filter Model 3000 from 8e6, is used to provide CIPA-compliant Public Workstations. A customer logs-in with a library card number and PIN, and can turn-off filtering if they are age 17 or over (from a date of birth check against the account in the ILS). Customers can turn off filtering from a pull-down menu that offers a set of restriction levels. The procedure to unblock filtering must be repeated upon each log in.

SAM allows customers to make reservations for the public PCs and limits printing (20 pages per day). Desktop documents are stored on each PC and deleted upon reboot. ITS desktop support personnel use Ghost, SCCM to image these PCs.

TABLE 1-2
CURRENT QUEENS PUBLIC LIBRARY MAJOR TECHNOLOGY PROJECTS
<p><u>SAM 10 upgrade</u></p> <ul style="list-style-type: none"> • SAM (Smart Access Manager) is used for PC scheduling's, Session managements, print management and internet content filtering (through 8e6). • Upgrade of SAM software from release 9.0 to 10 • Upgrade on all public access computer and laptops
<p><u>Staff and public PC upgrade to Windows 10</u></p> <ul style="list-style-type: none"> • Better security

TABLE 1-2
CURRENT QUEENS PUBLIC LIBRARY MAJOR TECHNOLOGY PROJECTS

- Better management and deployment support
- Better group policies
- Improved Microsoft support

Replacement of Public/Staff PCs

- Replacements of systems aged over 5 years

Simple Scan Stations

- Deployment of SimpleScan Stations at all Community libraries
- Scan documents to print, save on USB, Email, and Fax
- For Public use

Upcoming new and renovated branch buildings

- New Hunters Point Library
- Expansion of East Elmhurst Library
- Renovated Glendale Library
- New Richmond Hill Library
- In planning: Far Rockaway Library, Bay Terrace Library, Woodhaven Library

Web Technology

- Redesign of the Queens Public Library website
- Mobile App enhancement update plan
- More diverse Mobile Device builds for Tablets with themes (e.g. kids, teens, Summer Reading, health, Adult Learner Programs, challenged communities)
- Ereader design and development, integration with mobile app
- Tablet Enhancement Update Plan
- ADA Compliance training and testing
- Registration Web App/Self-service station plan
- Learning Management System Follow-up plan
- NISO fasten API workgroup Co-chair working with a group of library professionals and industry vendors to establish API standards, business processes, and implementation guidelines as it relates to eContent

Self-Checkout

- Migration of the current Self-Checkout system to the Library's new system.
- Adding new functions & hardware
 - Implementing Donation function
 - Allowing Customer registration
 - Integration with Novelist
 - Adding new standalone kiosks
 - Allowing item level fine payments

TABLE 1-2
CURRENT QUEENS PUBLIC LIBRARY MAJOR TECHNOLOGY PROJECTS

Integrated Library System/ILS

- Text message/SMS notifications
- Database cleanup and purge—fines, customers, items, and bibliographic records
- New customer mailing address verification at registration
- Upgrading the iTiva system to Windows 2016 and SQL 2016
- EZproxy upgrade

Digital Asset Management (VITAL)

- VITAL upgrade and enhancements
- Updating the customer submission form
- System upgrade to a new server with a higher storage

V. SCOPE OF SERVICES

The Library is seeking a proposer to provide a full featured Next-Generation Integrated Library System (“NGILS”) to replace the Library’s current Virtua Integrated Library System that includes all features of a traditional ILS, a web client and staff mobile interfaces, improved search and discovery, and improved access to digital resources. In addition, the Library is interested in a NGILS that also includes events management, an Acquisition module with possible integration with SAP, and a customer mobile app. The Successful Proposer’s NGILS is expected to not only include the Library’s current ILS functionality, but also provide innovative features that aim to enhance the Library staff and the Library’s customer experience. Additionally, the Successful Proposer should provide training of key Library staff, maintenance and support of the proposed NGILS, as well professional services for future customizations and enhancements.

The following are incorporated into the RFP and the Scope of Services. Proposers are to review and to respond as instructed to the following:

A. Requirements document. Located in Drop Box folder:

https://www.dropbox.com/sh/j2anyqfht6uz6cs/AAAqr0_X6jdQziWd5fM3bjNMa?dl=0

1. Review and respond to all questions and tables for Requirements, **SECTION 1 – NGILS FUNCTIONALITY AND SERVICE REQUIREMENTS.**
2. Review and respond to all questions and tables for Requirements, **SECTION 2 – REQUIREMENTS FOR CONVERSION, MIGRATION, TRAINING, AND IMPLEMENTATION.**
3. Review Requirements, **SECTION 3 – REQUIREMENTS FOR DAY ONE REPORTS AND VIEWS,** and proposer to affirm its understanding that this section relates to the Scope of Services and Requirements document.

B. Cost document. Located in Drop Box folder:

https://www.dropbox.com/sh/j2anyqfht6uz6cs/AAAqr0_X6jdQziWd5fM3bjNMa?dl=0

1. Proposers to respond to this section by completing cost form with its maximum costs in a separate, sealed interior envelope labeled “Cost Information”. Proposer to provide a separate electronic cost file with the electronic version of its proposal submission.

C. Interview and proposal demonstration.

1. Proposers are to indicate if they are willing to participate in interviews and demonstration of its proposed solution. Invitations for interviews and product demonstrations will only be extended to proposals selected in the sole judgement of the Library.

D. Appendix A. Located in Drop Box folder:

https://www.dropbox.com/sh/j2anyqfht6uz6cs/AAAqr0_X6jdQziWd5fM3bjNMa?dl=0

1. Proposer to affirm its understanding that this section relates to the Scope of Services.
2. Proposer to provide sample copies of all types of documentation, including training materials and operations manuals.

VII. THRESHOLD CRITERIA

Only Proposals submitted from proposers who meet the following minimum threshold requirements, will be considered by the Library:

- a. Proposer must have provided ILS products and/or related services for a minimum of three (3) years.
- b. Proposer must have successfully implemented an ILS system in a library system that has a minimum of 10 million in annual material circulation. Proposer to provide name of the library system, its annual circulation and identify the year of circulation.

VIII. PROPOSAL REQUIREMENTS

The following is a list of the information that must be provided in the Proposal. A proposal that does not include all of the information requested below may be deemed non-responsive and subject to rejection. **Proposals should respond to all areas listed below, in the order listed.**

Proposers shall indicate in their proposals what information, if any, is proprietary and confidential. Proposers are hereby advised that the Library is subject to the New York State Freedom of Information Law (“FOIL”). Material marked “Confidential and Proprietary” will be treated as such to the extent consistent with the obligations under FOIL, other applicable law, regulation or legal process.

A. Management and Qualifications

In setting forth its qualifications, each firm shall provide the information requested below, as appropriate. Responses to this Section should be limited to ~~twenty~~ **thirty-two (20 32)** single-sided pages in total (not including resumes), and shall be prepared on 8½ x 11-inch paper using at least 12-point type with standard margins no less than 1”.

Cover Letter (2-page limit)

A cover letter, which shall be considered an integral part of the submission, shall be bound with the submission and signed by the individual authorized to bind the firm contractually. In signing the cover letter, the firm agrees to be bound by the terms of this solicitation and its submission hereunder for no less than one year. The cover letter shall contain a statement that the firm’s work for the Library will not create any conflict of interest. If your firm believes that a conflict may arise, the nature of the conflict should be described – see question 16.

A. General Information (30 page limit)

1. Provide the proposers' s legal name, address, tax ID number and state of incorporation for the contracting entity submitting the submission.
2. Provide detailed information on how the proposer meets the requirements of RFP section VI, Threshold Requirements, which are:
 - a. Proposer must have provided ILS products and/or related services for a minimum of three (3) years.
 - b. Proposer must have successfully implemented an ILS system in a library system that has a minimum of 10 million in annual material circulation. Proposer to provide name of the library system, its annual circulation and identify the year of circulation.
3. Proposers responding to this RFP may submit more than one proposal. Proposers are not to provide a single proposal with multiple options. For example if a firm has multiple configuration capabilities such as an on premise solution, software as a service solution or a hybrid solution, proposer is to submit a separate and distinct proposal for each configuration. Proposers are not to provide a base proposal with options to increase costs. Instead, proposers are to reflect its maximum pricing. Respond to the following:
 - a. Proposer to affirm its understanding of item 3 above.
 - b. Proposer to list other proposals submitted.
 - c. Proposer to identify this proposal submitted and to indicate if the proposal is an on premise solution, software as a service solution or a hybrid solution
4. Provide a brief history of the company and successful experience installing the products and providing services requested in this RFP. Include any similar past or current projects in which the proposer is involved and the proposed key staff for providing the work described in this RFP, with specific references to work for public sector, not-for-profit corporations, library systems or other like-entities.
5. Provide the name, title, address, telephone, fax number and e-mail address of the individual the Library should contact with respect to your submission.
6. For each key staff position, attach a resume and/or description of their qualifications. In addition, provide a statement certifying that the proposed key staff will be available for the duration of the project.
7. To the maximum extent possible, identify the lead individual and the individual(s) who will perform the tasks outlined in the Scope of Services. Provide a narrative describing your firm's

proposed approach to library project including the firm's understanding of the objectives and complexities of the project, methodology for tracking and maintaining the project's budget and schedule, and techniques for problem solving.

8. Identify if your entire or partial solution is now or can be made available to the Library through a government contract such as GSA, NYS OGS, etc.
9. Identify any additional services not covered in the Scope of Service sections that your firm believes may be of particular value to the Library. Please describe why you believe these services to be relevant.
10. Identify any services listed in the Scope of Services your firm is not able to perform and explain why you are not able to perform these services.
11. Provide a minimum of three (3) recent clients as references from clients of similar size to that of the Queens Library and this Scope of Services (a "Reference Client"). Provide the Reference Client's name, contact person, title, address, and telephone number. Please provide details on the work performed for each Reference Client, including, the length of any contract, project costs, size of project, completion date and explanation of how the work performed is similar to the work required by the Library, as well as any other pertinent information relevant to representing your qualifications to perform the work. Identify where the proposed solution has been deployed. Discuss the availability of the Library to visit this location.
12. Explain how you will safeguard and keep confidential the data and information provided by the Library to you.
13. Provide copies of your two (2) most recent audited financial statements. If audited financial statements are not available, please explain why and identify how the Library can assess the financial condition of your firm.
14. Identify any sub-contractors that you plan to utilize as part of your proposed team.
15. Discuss any past or present civil or criminal legal investigations, litigation or regulatory action involving your firm or any of its employees that could affect your role or ability to serve as a consultant to the Library. If none, include a statement that there are no past or present civil or criminal legal investigations, or pertinent litigation and or regulatory actions that could impact your firm's ability to serve in the required capacity.
16. Identify the nature of any potential conflict of interest your firm or any proposed sub consultants might have in providing consulting services under this solicitation to the Library.
 - (a) Discuss fully any conflicts of interest, actual or potential, which might arise in connection with your firm's involvement with the Library. If your firm believes that a conflict of interest might arise, please describe how such conflict would be resolved.

(b) State whether your firm represents any party that is or may be adverse to the Library.

17. You must certify in writing that your representation of the Library will not create any conflict of interest involving that firm.

B. Response to RFP Section V SCOPE OF SERVICES (No page limit)

C. Other (No page limit)

1. Firms must either provide a statement accepting the terms and conditions in the Library's General Terms and Conditions, Attachment 2, or must alternately identify any exceptions taken to the terms and conditions. Any supplemental contract language that a proposer requires is considered by the Library as an exception and must be included in a proposer's proposal. If exceptions are taken, the firm must clearly identify the language that is being taken exception to and provide the suggested alternate language for each such exception. The nature and extent of exceptions, if any, taken by the firm to the Library's terms and conditions will be a factor considered in evaluating submissions. Firms that demonstrate a willingness to accept the Library's terms and conditions will be given more favorable consideration by the Library.

At any time during the RFP process, the Library, in its sole discretion, may reject a proposal that has exceptions to the Library's terms and conditions.

2. Firms shall indicate in their submissions what information, if any, is proprietary and confidential. Firms are hereby advised that the Library is subject to the New York State Freedom of Information Law ("FOIL"). Material marked "Confidential and Proprietary" will be treated as such to the extent consistent with the Library's obligations under FOIL or any other applicable laws, rules or regulations, and will not otherwise be disclosed by the Library except as necessary for the evaluation of submissions.

3. Firms shall confirm that they will meet the insurance obligations.

4. Firms to complete all forms if Attachment 1 and Attachment 3- Local Law 34.

VIII. EVALUATION AND SELECTION

A. Evaluation Criteria

A Selection Committee consisting of Library staff will evaluate the properly received proposals that meet the stated Threshold Criteria. This Selection Committee will make its recommendations to the Library for its determination as to its awards of a contract. The Selection Committee will

consider the following factors, though not necessarily listed in the order of importance, in considering submissions:

1. The firm's previous experience in providing the proposed services to libraries, not-for-profit corporations, library systems, public sector and other similar clients. The qualifications, experience and availability of the lead person(s) and team assigned to provide services to the Library. **Weighted Score: 10 Points**
2. The firm's proposed approach to library projects, including the firm's understanding of the objectives and complexities of library projects, methodology for tracking and maintaining the project's budget and schedule, and techniques for problem solving. **Weighted Score: 10 Points.**
3. The firm's response to RFP Section VI Scope of Services, Requirements 1, 2 and 3. **Weighted Score: 40 Points.**
4. Overall organization, completeness, and quality of submission, including cohesiveness, conciseness, clarity of response, demonstrated understanding of the Library, and degree of acceptance of the Library's terms and conditions in the Library's Standard Consulting Agreement. **Weighted Score: 10 Points.**
5. The Library will assess costs (proposer submission for RFP Section VIC Scope of Services, Cost Document) for firms that receive a passing evaluation for items 1 through 4 above. Such determination of a passing evaluation is at the sole discretion of the Library. **Weighted Score: 30 Points.**
6. Interviews and product demonstrations for proposers selected by the Library. **Weighted Score: 30 Points.**

B. Selection Process

The Selection Committee will evaluate all responsive proposals based on the criteria enumerated in Section VII, as referenced above. The Selection Committee may afford firms the opportunity to clarify submissions for assuring a full understanding of their responsiveness to the solicitation.

At the sole discretion of the Library, the Selection Committee may conduct interviews and product demonstrations of proposers found to be most qualified to perform the services required. Proposers selected for interviews and product demonstrations, will be notified in writing regarding the interview date(s).

At the conclusion of the evaluation process, the Library anticipates awarding a contract to a responsive and responsible firm whose proposal is determined to be the highest quality and most advantageous to the Library, taking into consideration the overall quality of the submission as measured against all the evaluation criteria above.

Prior to the award of any contract(s) under this solicitation, the Library will conduct a vendor responsibility assessment and may require eligible firms to answer questions and provide additional information to supplement the information provided in the proposal, Vendor

Responsibility Questionnaire or other materials to assist the Library in making such a determination. The Library reserves the right to conduct a site survey of the proposer's proposed solution. In its sole judgement, the Library may reject a proposal because of a site survey, vendor responsibility determination or other determination by the Library. The Library reserves the right to reconsider other proposals.

Proposers will be notified in writing once a proposal has been selected.

IX. PROPOSAL INSTRUCTIONS AND CONDITIONS

A. Limitations

1. This RFP does not commit the Library to award a contract, pay any costs incurred in the preparation of a response, or procure or contract for services of any kind whatsoever. The Library reserves the right, in its sole discretion, to accept or reject any or all proposals as a result of the RFP, to negotiate with any or all firms considered, and to cancel this RFP in whole or in part. The Library reserves the right to request additional information from all Proposers.
2. Proposers responding to this RFP may submit more than one proposal. Proposers are not to provide a single proposal with multiple options. For example if a firm has multiple configuration capabilities such as an on premise solution, software as a service solution or a hybrid solution, proposer is to submit a separate and distinct proposal for each configuration. Proposers are not to provide a base proposal with options to increase costs. Instead, proposers are to reflect its maximum pricing.
3. Proposers may be requested to clarify the contents of their proposals. Other than to provide such information as may be required by the Library, no Proposer will be allowed to alter its proposal or to add new information after the RFP due date.
4. Proposers may be required to participate in negotiations and to submit any price, technical or other revisions to its proposal which may result from such negotiations.
5. Proposers must fully execute the forms contained in Attachment 1 and Attachment 3 and submit them with its proposal.
6. All material submitted in response to this RFP will become the sole property of the Library.

B. Proposal Submission

1. Proposals must include a cover letter indicating the mailing address of the office from which the proposal was submitted, the name and email address of the individual who will represent the firm as the primary contact person for the proposal, and the telephone and facsimile numbers of the primary contact person.
2. Non-responsive proposals include, but are not limited to, those that:

- (a) Do not conform to the RFP requirements and instructions;
- (b) Are conditional; or
- (c) Contain a material omission(s).

The Library may waive minor informalities or irregularities in a proposal that are merely a matter of form and not substance, the correction of which would not be prejudicial to other proposers.

C. Administrative Specifications

1. All proposals must be irrevocable for one year and signed by an authorized officer of the firm.
2. The successful Proposer(s) must agree to provide the Library with audit access on request during the term of the contract and for 7 years thereafter.
3. The Library at any time and in its sole discretion, may terminate its contract with the successful proposer(s), or postpone or delay all or any part of the contract, upon written notice.
4. All Proposers are obligated to update any changes in their proposals prior to the proposal due date.

D. Addendum, Errors and Omissions

1. If a Proposer discovers any ambiguity, conflict, discrepancy, omission or other error in this RFP, it shall immediately notify William Funk, in writing, of such error and request clarification or modification to the document.
2. Should the Library find it necessary to modify this RFP, a notice of that modification will be made by way of an addendum that will be posted to the RFP website.
3. If a Proposer fails to notify the Library of a known error or an error that reasonably should have been known prior to the final filing date for submission, the Proposer shall assume the risk. If awarded the contract, the Proposer(s) shall not be entitled to additional compensation or time by reason of the error or its late correction.

E. Debriefing of Unsuccessful Proposers

Upon written request via email to William Funk, a debriefing will be scheduled with an unsuccessful Proposer after the Library has provided notice of its selection of one or more successful Proposer(s). Discussion will be limited to a critique of the proposal submitted by the Proposer requesting the debriefing. Comparisons between proposals or evaluations of the other proposals will not be discussed. Debriefings may be conducted in person or on the telephone, at the Library's discretion.