



REQUEST FOR PROPOSAL
For
Integrated Library Management System
PIKES PEAK LIBRARY DISTRICT
Colorado Springs, CO

RFP # 290-24-01

The Pikes Peak Library District (PPLD) invites qualified firms to submit proposals to provide and support a new Integrated Library Management System for the District.

Proposal deadline is 2 p.m. MST on Friday June 14, 2024

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1. Terms & Conditions

- 1.1. Purpose: Pikes Peak Library District (PPLD) is seeking proposals from qualified firms to provide and support an Integrated Library Management System (ILS). This project is targeted to be completed by the end of 2025.
- 1.2. Interested Parties: All interested vendors that have the qualifications as stated herein and are licensed to operate within El Paso County and the State of Colorado, are invited to submit a proposal in accordance with the terms, conditions, and specifications contained herein. An electronic version of this document can be accessed at: <http://ppld.org/request-for-proposals>.
- 1.3. Sole Point of Contact: Questions and requests for clarification must be sent via e-mail to Jenny Pierce, Director of Collection Management, at jpierce@ppld.org, and Cc: khoggatt@ppld.org. Please include the RFP number, title, and words “question” and/or “clarification” in the subject line of the e-mail.

Questions and requests without this subject identification may be considered routine emails and may not be properly addressed.

All answers to questions and requests for clarification will be posted on the PPLD website: <http://ppld.org/request-for-proposals>.

Any PPLD response that is considered to be a change in terms, conditions, and specifications of this RFP will be published as an addendum. No communications of any kind may be considered as a change to the terms, conditions, and specifications in this RFP unless posted as a formal addendum on the link above.
- 1.4. Equal Opportunity: The Contractor agrees not to refuse to hire, discharge, promote, or demote, nor to discriminate in matters of compensation against any person otherwise qualified, solely because of race, color, religion, national origin, gender, age, military status, sexual orientation, marital status, or physical or mental disability.
- 1.5. Expenses: PPLD assumes no liability for payment of expenses incurred by proposers in the preparation and submission of proposals in response to this invitation.
- 1.6. Conflict of Interest: Any contractual relationship with any PPLD personnel in the twelve (12) months preceding the distribution of this RFP, or any similar or potential conflicts of interest, may, at the sole discretion of PPLD, be grounds for rejection of the proposal and/or termination of any contract awarded.
- 1.7. Independent Contractor: Independent Contractor. The Vendor is an independent contractor. Notwithstanding any provision appearing in this RFP, all personnel assigned by the Vendor to perform work under the terms of this RFP and any subsequent agreement shall be, and remain at all times, employees or agents of the Vendor for all purposes. The Vendor shall make no representation that it is the employee of PPLD for any purpose.
- 1.8. Immigration Clause: The Vendor is aware of Colorado’s Immigration Illegal alien laws pertaining to public contracts. Addendum B - Immigration Clause for Contracts (Colorado Statute 8-17.5-102) must be signed and attached.
- 1.9. General Requirements: PPLD reserves the right to amend this RFP up to seven (7) business days prior to the date set for receipt of proposals. In addition, PPLD may extend deadlines or withdraw this RFP at any time prior to an award.
- 1.10. Tax Exemption: PPLD, as a local government entity, is exempt from sales and use taxes. Vendors will inform all prospective subcontractors and suppliers, as necessary, from whom they expect to obtain services or supplies of the tax-exempt status of PPLD. Following the contract award, PPLD will furnish tax exemption certificate(s) to the Vendor.

Governing Law: The laws of the State of Colorado shall govern any contract executed between the successful proposer and PPLD. Further, the place of performance and transaction of business shall be

deemed to be in the County of El Paso, State of Colorado, and in the event of litigation, the exclusive venue and place of jurisdiction shall be the State of Colorado, and more specifically, El Paso County, Colorado.

1.11. RFP Schedule:

RFP released.....	Friday April 26, 2024
Deadline for final questions.....	Friday May 10, 2024
Deadline to return answered questions.....	Friday May 17, 2024
Proposals due.....	Friday June 14, at 2:00 pm
Onsite Demonstration.....	to be scheduled the last week of September.
Board Review and Decision.....	Wednesday November 20, 2024
Award Notification.....	on or about Thursday December 4, 2024

2. **Proposal Submission, Selection, and Contract Formation**

2.1 Proposal Submission

2.1.1. Substantive proposals: By submitting a proposal, the proposer guarantees that (a) its proposal is genuine and is not made in the interest of, or on behalf of, any undisclosed person, vendor, or corporation; (b) it has not directly or indirectly induced or solicited any other respondent to put in a false or sham bid; (c) it has not solicited or induced any other person, vendor, or corporation from proposing; (d) it has not sought by collusion to obtain for itself any advantage over any other proposer or over PPLD.

2.1.2. Submission Information and Documents: The proposal must be comprehensive and address all RFP requirements. To assure that the information provided can be readily identified, the proposal must include, but not limited, to the submission of the following signed documents:

2.1.2.1.1. Addendum A - PROPOSAL COVER SHEET

2.1.2.1.2. Addendum B - Checklist

2.1.2.1.3. Addendum C - IMMIGRATION CLAUSE FOR CONTRACTS

2.1.2.1.4. Exhibit A - Project background.

2.1.2.1.5. Exhibit B, C, D, E, F - Vendors are requested to submit a response for each numbered or lettered item. The response must be in the same sequence as in the RFP. The response must include description, schedules, when required, and any additional clarifying information.

2.1.2.1.6. Length Limit - The proposal will be submitted in **one hundred double sided pages** or less, accompanied by an electric copy of the proposal. Each page must be numbered. Failure to follow the prescribed format may result in disqualification of the proposal prior to scoring.

2.1.2.1.7. Exception to Length Limit - Documentation provided to clarify the summary of the costs or any attachments is excluded from the proposal length limit.

2.1.2.1.8. List of exceptions or deviations if any.

2.1.3. Signatures: The proposal must be signed by an officer of the proposing vendor.

2.1.4. Exceptions and Deviations: Any exception to or deviations from these Terms & Conditions must be identified, in writing, in an attachment to the proposal submission. PPLD reserves the right to accept or reject, at its sole discretion, any exceptions, or deviations by the proposer.

2.1.5. Integration with Contract: The winning proposal will be included and integrated into the final contract documents.

2.1.6. Proposal Submission: Proposals are to be submitted in sealed envelopes, identified with the proposal

number and title with all attachments. See the Schedule of Events for due dates. Vendors must submit one (1) hard copy and soft copy (i.e., flash drive) of the Proposal to:

Pikes Peak Library District
Attn: Kim Hoggatt
Finance Office
RFP #290-24-01
1175 Chapel Hills Drive,
Colorado Springs, CO, 80920

Additional copies may be requested by Pikes Peak Library District. Pikes Peak Library District is not liable for any cost incurred by prospective respondents prior to the issuance of contract(s).

The deadline (firm) is Friday June 14, 2024, at 2:00 p.m. local time. Proposals delivered after that time will be received but will be rejected for being late.

A complete submission includes all required components, as stated in this document.

2.1.7. Duration of Proposal Offer: Price offers are irrevocable for 90 days following the proposal due date. Once a proposal is accepted, all prices, terms and conditions will remain unchanged throughout the contract period unless specifically agreed otherwise by both PPLD and the successful Vendor through documented change orders.

2.1.8. Withdrawal of Proposal: A Proposer may withdraw its own proposal at any time prior to the proposal due date and time as identified herein. After that date and time, no proposer may withdraw its proposal for any reason. All proposals shall be valid for a period not less than 90 calendar days after the proposal due date.

2.1.9. Information to Vendors:

2.1.9.1. No proposal shall be accepted from, and no contract will be awarded to any person, vendor or corporation that is deemed irresponsible or unreliable by PPLD. If requested, Vendors will submit satisfactory evidence that they have a practical knowledge of the service bid upon and that they have the necessary financial resources to provide the proposed service called for as described in this Request for Proposal.

2.1.9.2. PPLD reserves the right to investigate and confirm the vendor’s financial stability. This may include reviewing financial statements, checking bank references, and interviewing past contractors, employees, and creditors. Unfavorable responses to these investigations are grounds for rejection of the proposal.

2.1.10. Confidentiality: All materials submitted in response to this RFP become the property of PPLD upon delivery.

Proposals are public information. If a vendor submits proprietary information, the vendor will label each proprietary page as “CONFIDENTIAL” and submit it in a separate package so PPLD will not release any information marked as Confidential.

2.1.11. Subcontracting: The Contractor must be responsible for the performance of all of its subcontractors, sub-sub-contractors, and consultants. The use of specific subcontractors and consultants is subject to the approval of PPLD. The Contractor is responsible for ensuring that all sub-contractors and consultants comply with all the terms of the Contractor’s contract with PPLD.

If the Contractor uses subsidiary companies, explain their role and how they will be involved in this project.

2.1.12. Insurance Requirements: The successful proposer shall have, at the minimum, the following coverage: commercial general liability, automobile liability, excess liability, and worker’s compensation liability. The Vendor shall submit in their proposals, ACORD certificates and/or other proof of the following insurances:

- 2.1.12.1. General Liability \$1,000,000
- 2.1.12.2. Automobile Liability \$1,000,000
- 2.1.12.3. Worker’s Compensation liability that meets statutory requirements.

- 2.1.13. Indemnification: The proposer agrees to, and shall, defend, release, indemnify, and save and hold harmless PPLD, its officers, agents, and employees from and against any and all damages to property or injuries to or death of any person or persons, including property and officers, employees, and agents of PPLD, and further agrees to, and shall, defend, indemnify, and save and hold harmless PPLD, its officers, agents, and employees, from and against any and all claims, costs, demands, liabilities, suits, actions, causes of action, and other legal or equitable proceedings of any kind or nature whatsoever, of or by anyone whomsoever, including, but not limited to claims arising out of and/or predicated upon negligence, breach of contract, tort, or strict liability, in any way resulting from, connected with, or arising out of the Contractor’s operations or performance in connection herewith, including operations or performance of subcontractors and suppliers and acts or omissions of officers, employees, or agents of the Contractor or its subcontractors or suppliers.
- 2.1.14. Schedule: By submitting a proposal, the proposer guarantees that it will be able to comply with the overall elements of the project calendar, or must indicate an alternative timeline in the proposal, which will be vetted by PPLD, as to feasibility and acceptability.
- 2.1.15. Continuity: By submitting a proposal, the proposer will make its best efforts to ensure that the key team member(s) remain assigned to the PPLD’s project for the duration of contract. Any changes to the staffing of this engagement must be discussed up front with PPLD personnel.

2.2. Selection

- 2.2.1. Right of Acceptance and Rejection: PPLD reserves the right to accept or reject any or all proposals and to waive any formalities, informalities, and deviations, which, in its opinion, best serve the interests of PPLD. PPLD is not bound to accept the lowest price proposal.
- 2.2.2. Selection: It is the intent of PPLD to select only responsible and responsive vendors. Bidder’s proposal should include the most favorable terms and conditions.
- 2.2.3. Negotiation: PPLD reserves the right to negotiate the terms and conditions of the contract with the winning vendor.
- 2.2.4. Two-day onsite demonstrations: Finalists should be prepared to demonstrate the features and functions of their system to the Selection Committee onsite. We anticipate a two-day demonstration. Vendors will provide demonstrations using scenarios provided by the library. The vendor’s costs for the demonstration shall be the responsibility of the vendor. The demonstration will validate system functional requirements and other characteristics of the proposed system. PPLD is focused on the outcomes of the provided scenarios and how they are achieved rather than trying to re-create current workflow processes. Vendors will be rated on ease and logical flow of the processes as well as the ability to complete the task(s) at hand.
- 2.2.5. Basis of Award: An evaluation team will judge the merit of proposals received in accordance with the general criteria defined within this RFP. The recommendations of this team will be forwarded to the Board of Trustees for approval and execution. The following criteria will be taken into consideration when making evaluations of proposals. This list is not intended to be exhaustive:

Weight	Description
15	Proposed Costs. The cost of the proposed system and services required by the RFP. The breakdown of all proposed costs as requested should be clear and concise.
75	Technical Requirements – Third party integration, Key Functionality, onsite demonstrations, vendor technical requirements.
10	Vendor’s References
100 Total Points	

No modification of award shall be binding upon PPLD unless made in writing and signed by authorized agents of both parties.

2.3. Contract Formation

2.3.1. Agreement in Writing: Following selection of a proposal, the vendor will be required to enter into a written contract with PPLD.

The winning Bidder's RFP proposal will be included and integrated into the final contract documents. It is in the Bidder's best interest to ensure the proposal is accurate to allow for the integration with minimal changes.

If you have a formal or standard contract that you typically use with such projects, please attach a copy to your Proposal. A Service Agreement is not a condition of accepting an RFP.

If, at PPLD's sole discretion, the selected proposer has not executed the contract documents within a reasonable time after selection, PPLD reserves the right to rescind the award and select another contractor.

2.3.2. Amendments to Contract: Parties hereto reserve the right to make amendments or modifications to the contract by written amendment signed by both parties.

2.3.3. Non-Appropriation/TABOR Amendment: PPLD and Vendor acknowledge and agree that this Agreement does not constitute a multi-year financial obligation of the Pikes Peak Library District under the Taxpayers Bill of rights (TABOR) of the Colorado Constitution. Therefore, this Agreement is subject to annual appropriation for payment by the Pikes Peak Library District's Board of Trustees. In the event of a non-appropriation for payment by the Pikes Peak Library District, this Agreement shall terminate without further obligation (financial or otherwise) of the Pikes Peak Library District to Vendor on 30 days written notice to Vendor, other than for payments on services previously rendered through the termination of the Agreement.

2.3.4. Termination of Contract for Cause: If, through any cause, the successful Bidder shall fail to fulfill in a timely and proper manner its obligations or if the successful Bidder shall violate any of the covenants, agreements, or stipulations of the Contract, PPLD shall thereupon have the right to terminate the Contract by giving written notice to the successful Bidder of such termination and specifying the effective date of termination. In that event, all finished or unfinished services, reports or other materials prepared by the successful Bidder shall, at the option of PPLD, become its property, and the successful Bidder shall be entitled to receive just, equitable compensation for any satisfactory work completed, prepared documents or materials as furnished. Notwithstanding the above, the successful Bidder shall not be relieved of liability to PPLD for damage sustained by PPLD by virtue of breach of the Contract by the successful Bidder and PPLD may withhold any payments to the successful vendor for the purpose of set off until such time as the exact amount of damages due PPLD from the successful Bidder is determined.

2.3.5. Termination of Contract for Convenience: PPLD may terminate the Contract at any time by giving written notice to the successful vendor of such termination and specifying the effective date thereof, at least thirty (30) working days before the effective date of such termination. In that event, all finished or unfinished services, reports, material(s) prepared or furnished by the successful Bidder under the Contract shall, at the option of PPLD, become its property.

2.3.6. Cancellation: Either party may cancel the Contract in the event that a petition, either voluntary or involuntary, is filed to declare the other party bankrupt or insolvent or in the event that such party makes an assignment for the benefit of creditors.

3. **Scope of Work**

3.1. General Information: Using the Symphony ILS, PPLD currently provides service to almost 290,000 active customers and supports a circulation of over 6.8 million items as of 2022. The ILS maintains and manages all transaction data, authenticates customer access to our electronic collection, computer reservation system and multiple databases, manages holds fulfillment, handles acquisitions functions including electronic orders, and provides cataloging functions. SirsiDynix, Symphony's vendor, also provides the discovery layer customers use to interface directly with their accounts.

PPLD is a system of public libraries serving a population of 869,440 in El Paso County, Colorado. With sixteen facilities, online resources, and mobile library services, PPLD responds to the unique needs of individual neighborhoods and the community at large. PPLD has more than 600,000 physical items in its collection and over 275,000 e-book/e-audio/e-magazines, as well as the District’s streaming services.

PPLD’s mission is to: “Cultivate spaces for belonging, personal growth, and strong communities.”

3.1.1 The specification of this project is located in Exhibit A at the end of the RFP.

- Addendum A - Proposal Cover Sheet**
- Addendum B - Checklist**
- Addendum C - Immigration Clause for Contracts**
- Exhibit A – Project Background**
- Exhibit B – Key Functions**
- Exhibit C – Third-Party Products**
- Exhibit D – Customized Changes to Symphony Integrated Library System (ILS)**
- Exhibit E – Vendor System Specifications and Requirements**
- Exhibit F – Summary of Costs**

3.2. The successful proposer shall be required to furnish all permits, equipment, tools, machinery, transportation, and other implements necessary to fulfill the provisions of this Contract. This includes but is not limited to all procurement and contracting requirement specifications included within.

3.3. All work shall be done to the highest of industry quality and standards.

4. Vendor Qualification and Information

4.1. In order for proposals to be considered by PPLD the proposed system must meet the following minimum qualifications:

- 4.1.1 The system must have the proven ability to serve a population of over 350,000 registered patrons and support a circulation of eight million items.
- 4.1.2 The system must have been in production in the United States for at least five years.
- 4.1.3 In addition, the system must have the proven ability to manage one million holds per year and electronically order and catalog over 90,000 items purchased each year where the budget is composed of at least two hundred funds.

4.2 Provide the following information:

- 4.2.1 Provide a brief description of your firm’s background with large public libraries and proposed ILS.
- 4.2.2 Number of years in business.
- 4.2.3 Number of library customers (counted by servers).
- 4.2.4 Number of public library customers using the proposed ILS (counted by servers).
- 4.2.5 Number of technical support staff for the proposed ILS.
- 4.2.6 Service Level Agreement options, e.g., the plans available to the District for technical support and maintenance of all components.
- 4.2.7 List any pending litigation, litigation Vendor is a party to, or any litigation within the past two years.

4.2.8 Please describe how you anticipate responding to new technologies and what is the company’s future direction over the next three years.

4.3 Provide at least three public library references and contact names for the ILS being bid by your company for PPLD. References should be from libraries which have:

4.3.1 Over one million annual circulations.

4.3.2 Over 1,000 concurrent users, both in-library and remotely.

4.3.3 Is a multi-branch system.

5. System Acceptance

5.1 The minimum completion criteria for the implementation of the proposed integrated library system will be as follows:

5.1.1 Functional testing will be satisfactorily completed for each module, including third-party products and electronic workflow.

5.1.2 All data sharing between the ILS and all third-party products will be validated, tested, and audited as meeting the requirements.

5.1.3 System interfaces and the discovery platform will be implemented and tested.

5.1.4 Documentation of business processes, end-user procedures, and completion of the training plan for system users and technical staff.

5.1.5 Technical system management procedures will be documented and in place at the initial ‘GO-LIVE’.

5.1.6 System initial ‘GO-LIVE’ will be achieved on time and within the budget. The final ‘GO-LIVE’ and acceptance will occur within 90 days after the initial ‘GO-LIVE’. This 90-day period starting after the initial ‘GO-LIVE’ will be designed as the “BREAK-IN” period.

6. Summary of Costs – please refer to Exhibit F

ADDENDUM A - PROPOSAL COVER SHEET

I. GENERAL INFORMATION

1. VENDOR NAME _____

2. ADDRESS _____

3. PHONE _____

5. E-MAIL AND WEBSITE _____

6. CONTACT _____

II. STATEMENT OF MINIMUM QUALIFICATION

I, _____ (printed name) hereby declare

that I am the _____ (title) of

_____ (name of firm) submitting this profile and declaration, and that I am duly authorized to sign this profile and declaration on behalf of the above named vendor. All information set forth in this profile and declaration and all attachments hereto are, to the best of my knowledge, true, accurate, and complete as of the submission date.

The signer further certifies that (please initial):

- a. _____ The Vendor has carefully examined all instructions, requirements, specifications, and terms and conditions of the RFP for which this proposal is submitted. The Vendor understands all instructions, requirements, specifications, and terms and conditions of this RFP, and hereby offers and proposes to furnish the goods and services described herein at the prices, fees, and/or rates identified in this proposal, in accordance with the instructions, requirements, specifications, and terms and conditions of this RFP.
- b. _____ This proposal is a valid and irrevocable offer that will not be revoked and shall remain open for the PPLD's acceptance for a period of ninety (90) calendar days from the proposal due date.
- c. _____ The Vendor is in full compliance with all applicable federal, state, and local laws, rules, regulations, and ordinances governing business practices.
- d. _____ All statements, information, and representations prepared and submitted in this proposal are current, complete, true, and accurate.
- e. _____ Submission of this proposal indicates the signer's acceptance of the evaluation technique and that some subjective judgments may be made by PPLD as part of the evaluation.
- f. _____ The Vendor has to provide proof of all required insurance coverage.
- g. _____ A list of exceptions and deviations (if any) is attached.

h. _____ There have been no claims, litigation, or other issues filed or pending against our firm in the past 5 years except as listed below.

i. _____ The Vendor is aware of Colorado’s Immigration / illegal alien laws pertaining to public contracts. Addendum C (Colorado Statutes 8-17.5 – 102) is signed and attached.

Authorized Signature

Date

ADDENDUM B - CHECKLIST

VENDOR QUALIFICATIONS (Fill in or attach additional pages as needed):

A. SIZE and AGE of your vendor _____

B. VENDOR'S EXPERIENCE:

1. Vendor qualifications:

1.1. List Library name, contact information, migration from Symphony ILS, and Open orders migrated during a fiscal year.

Library Name: _____ Contact Name: _____
Address: _____ Phone: _____
Migration from Symphony ILS: _____
Open Orders migrated during a fiscal year _____

Library Name: _____ Contact Name: _____
Address: _____ Phone: _____
Migration from Symphony ILS: _____
Open Orders migrated during a fiscal year _____

Library Name: _____ Contact Name: _____
Address: _____ Phone: _____
Migration from Symphony ILS: _____
Open Orders migrated during a fiscal year _____

The checklist below describes the Exhibits and Attachments that must be addressed in the proposal. Failure to address all sections of the checklist may result in the disqualification of the proposal.

The proposal itself should consist of no more than one hundred double-sided pages with all documentation provided in electronic or online format. Length exception does include clarifying the summary of costs or attachments B through E.

- A. ADDENDUM A - Proposal Cover Sheet
- B. ADDENDUM B – Checklist
- C. ADDENDUM C – Immigration Clause

- D. Exhibit A - Project Background
- E. Exhibit B - Key Functions Requirements
- F. Exhibit C – Third Party Products
- G. Exhibit D – Customized Changes to Symphony
- H. Exhibit E – Vendor System Specifications and Requirements
- I. Exhibit F – Summary of Costs

ADDENDUM C - IMMIGRATION CLAUSE FOR CONTRACTS

Pursuant to Colorado Revised Statutes Section 8-17.5-102, the Pikes Peak Library District (“PPLD”) shall not enter into or renew a public contract for services with a contractor who knowingly employs or contracts with an illegal alien to perform work under the contract or who knowingly contracts with a subcontractor who knowingly employs or contracts with an illegal alien to perform work under the contract.

Accordingly, Contractor agrees that it shall not:

Knowingly employ or contract with an illegal alien to perform work under this Agreement; or
Enter into a contract with a subcontractor for work under this Agreement that fails to certify to the Contractor that the subcontractor shall not knowingly employ or contract with an illegal alien to perform work under this Agreement.

Further, Contractor agrees that it shall comply with the following:

Contractor has confirmed the employment eligibility for all employees who are newly hired for employment to perform work under this Agreement through participation in either the E-Verify program administered jointly by the U.S. Department of Homeland Security and the Social Security Administration (the “E-Verify Program”) or the department program administered by the Colorado Department of Labor and Employment (the “Department Program”).

Contractor shall not use the E-Verify Program or the Department Program procedures to undertake pre-employment screening of job applicants while the services under this Agreement are being performed.

Should Contractor obtain actual knowledge that a subcontractor performing work under this Agreement knowingly employs or contracts with an illegal alien, the Contractor shall:

Notify the subcontractor and PPLD within three days that Contractor has actual knowledge that the subcontractor is employing or contracting with an illegal alien; and

Terminate the subcontract with the subcontractor if, within three days of receiving the notice, the subcontractor does not stop employing or contracting with the illegal alien; except that Contractor shall not terminate the contract with the subcontractor if, during such three days, the subcontractor provides information to establish that the subcontractor has not knowingly employed or contracted with an illegal alien.

Contractor shall comply with any reasonable request by the Colorado Department of Labor and Employment (the “Department”) made in the course of an investigation that the Department may undertake pursuant to its authority under Colorado Revised Statutes Section 8-17.5-102(5).

Authorized Signature

Date

Exhibit A- Project Background

A. About Pikes Peak Library District

- (a) The District has used the Symphony ILS since 2001, which is composed of a discovery layer, circulation, acquisitions, serials, and cataloging. The District’s email notices are currently provided by UMS’s MessageBee service and the District’s mobile app is currently being provided by SOLUS.
- (b) The District currently uses over thirty separate third party products including:
 - (i) 43 Self-Checkout kiosks
 - (ii) Two automated materials handling systems
 - (iii) PC Reservation system and print management supplied by TBS.
 - (iv) Freegal Music
 - (v) Overdrive Inc.
 - (vi) Kanopy

For a complete list of third-party products interfaced to the Symphony system, see Exhibit C.

B. Current Environment

- (a) The District seeks an ILS that supports the continued growth and innovation of PPLD, delivers 24/7 availability to our customers and staff, integrates with our current third-party products through either a robust SIP2 interface, API, or web services, provides a Community Engagement Platform, as well as the following components:
 - (i) Acquisitions
 - (ii) Cataloging
 - (iii) Circulation
 - (iv) Holds/requests management.
 - (v) Interlibrary loan integration
 - (vi) Serials
 - (vii) Discovery layer
 - (viii) Mobile app - optional

- (ix) Room Reservations – optional
 - (x) Programming calendar – optional
 - (xi) “Library of Things” reservation system – optional
- (b) PPLD is interested in the installation of the above-mentioned software for access by sixteen libraries throughout the system using a SaaS option. The vendor must demonstrate prior successful installations for other multi-library public library systems similar to that of PPLD.
- (i) Over six million annual circulations
 - (ii) At least sixteen libraries with concurrent use
 - (iii) A database of at least 250,000 MARC records
 - (iv) A database of at least 350,000 patron records

C. Business Objectives

The purpose of this project is to ensure that PPLD will continue to meet the needs of our customers and provide library services in unique and innovative ways.

- (a) Ensure continued operation of library services.
 - (i) Ensure mission critical software is supported and maintained.
 - (ii) Ensure continued development and enhancement of software.
- (b) Increase library user satisfaction with the catalog and account management.
 - (i) Provide more relevant search results from the catalog.
 - (ii) Provide format roll up (FRBR) to decrease scrolling.
 - (iii) Provide improved online customer account management.
 - (iv) Provide a more interactive customer experience.
 - (v) Provide integration with Interlibrary loan (ILL) requests.
- (c) Increase community engagement experience.
 - (i) Provide customer relationship management.
 - (ii) Provide a more targeted approach to customer communication.
 - (iii) Provide integrated approach to email and text notices.
- (d) Decrease and/or balance staff workload by improving workflows and processes.
 - (i) Improved processes when handling floating materials.

- (ii) Decrease staff time when working with library customer data.

D. Project Requirements

PPLD desires to complete the RFP process, purchase, train, implement, and migrate to the new system by the end of 2025.

- A. System Specifications – Vendors are requested to submit a response for each numbered or lettered item of each exhibit. The response must be in the same sequence as in the RFP. The response must include description and, when required, and any additional clarifying information.

- (a) Key Functions – Exhibit B
- (b) Third Party Products – Exhibit C
- (c) Customized Changes to Symphony Integrated Library System – Exhibit D
- (d) Vendor System Specifications and Requirements – Exhibit E

B. Project Management and Timeline

The vendor is responsible for providing management of their own resources in order to meet the project goals and time schedule. PPLD will be responsible for providing project management of its resources and will ensure the availability of sufficient PPLD staff and resources to meet the goals and time schedule agreed to after the award of the contract.

The vendor will work closely with the PPLD’s project manager to jointly develop and maintain a detailed overall project plan and timeline.

C. Implementation

After awarding the contract, the vendor will develop a Project Work Plan for implementing the system and migrating the PPLD’s current system data. At a minimum, the following areas will be addressed:

- (a) Identify the vendor’s project team, their expertise, and their responsibilities.
- (b) Provide a “best case” implementation schedule based on a negotiated start date following award of the contract.
- (c) Transition plan (incoming and outgoing).
- (d) Document all requirements, PPLD responsibilities, and specifications for migration and implementation.
- (e) Identify process of training system users and the resources available to the District.

D. Data Conversion and Migration

PPLD requires the following data to be migrated from the current ILS by the vendor. If data must be converted or cannot be migrated, please specify.

- (a) Conversion of current library parameters with assistance in making changes as required.

- (b) Patron information: including create date, expiration date, last activity date, birthdate, notes, current checkouts and holds, borrower profile, and PIN.
- (c) Bibliographic information including MARC fields.
- (d) Serial volume/control records.
- (e) Item information: including current status, holds, complete hold queue (in order by date of request) and number of checkouts.
- (f) Transaction data: including previous circulation data by patron profile, item type/collection code, and library location.
- (g) Patron “My List” data.
- (h) Please see Exhibit B for a more detailed list.

E. Testing

The vendor will provide the following:

- (a) A testing environment for all modules of the ILS and online Catalog. Test data to be retrieved from current ILS.
- (b) Guidance and assistance in developing test strategies, plans, and test plan to ensure that each module is ready for production and full operation at ‘GO-LIVE’ plateau.

F. Technical Services “Go Live”

- (a) With Cataloging staff, set up of authority service or import profiles for external authority service.
- (b) With Acquisitions staff, assistance with setting up the Materials budget.
- (c) With Acquisitions staff, assistance with set up and testing of ordering and invoicing with two major vendors.
- (d) With Cataloging staff, assistance with set up and testing of MARC import profiles with two major vendors.

Exhibit B- Key Functions - Please see appended PDF Worksheet

Exhibit C Third Party Integrated Products

The District depends upon a large number of third-party products that are critical to the day-to-day function of the District. Any system bid must either integrate with the District’s third-party products (or provide services native to the ILS that are comparable to these third-party solutions).

Below is a list of products integrated with the current ILS. Please describe how your system interacts with each of these products and services. Are there any potential issues with your ILS system and the current third-party systems that should be known?

Software	Vendor	Version	ILS Communication Protocol	In use since	Notes	Currently integrated (y/n) and method of integration (SIP2 or API)
PC reservation system (MyPC) and print management (Papercut)	TBS	6.4.0	SIP2	2018		
SmartPay	Comprise Technologies Inc.	5.8	SIP2	2021		
Bibliotheca Self-checkout kiosks	Bibliotheca	Bibliotheca self-check 1000	SIP2	2007 (replaced 2022)		
Tech-Logic desktop client RFID software	Tech-Logic		Screen scraping	2020	Please specify if ILS provides full integration and is the integration with staff client and/or web-based client. Only hold information is sent.	
Tech-Logic RFID wand	Tech-Logic		SIP2	2019		

Automated Material Handling (AMH)	RFID Library Solutions		SIP2	2014		
Telephone notification service	UMS		Flat file	2016	Currently data is sent, via a report, to UMS which is then used by their telephone notification system.	
Novelist Select	EBSCO	Latest	Web Services		If system provides comparable service, please specify.	
Novelist Plus	EBSCO	Latest	Flat file		Integration into Novelist Plus that allows users to directly determine if the District owns a title	
EZproxy	OCLC	Hosted	SIP2			
Printed OverDue notices	Unique Management	Latest	Flat file		Currently data is sent, via a report, to UMS.	
MessageBee	Unique Management	Latest	SFTP		Patron notices and various email campaigns.	
OverDrive	OverDrive	Latest	SIP2 and API		Provides direct integration into the Catalog. No records are loaded into the ILS.	
Freegal	Freegal	Latest	SIP2			

LinkedIn Learning	LinkedIn	Latest	SIP2			
HelpNow	Brainfuse	Latest	SIP2			
Hoopla	Midwest Tapes	Latest	SIP2			
Kanopy	OverDrive	Latest	SIP2			
Gale, EBSCO and Proquest databases.			SIP2			
Solus mobile app	Solus	2023	SirsiDynix Web Services			
Author Alert	Engaged Patrons	Latest	SIP2		Currently integrated into the online Catalog.	
Ingram iPage	Ingram		SFTP			
Assabet	Assabet Interactive LLC	Latest	SIP2	2020		

TixKeeper	Plymouth Rocket	Latest	2019	SIP2		
Baker & Taylor			SFTP			
Illiad	OCLC		EzProxy			
OCLC Connexion Client	OCLC	3.0	N/A			

For each Third-Party Product, provide responses to the following:

- A. Provide at least one public library reference where this third-party product has been integrated.
- B. Or note if vendor offers comparable function, module, or product that can replace this third-party product. If yes, please provide a detailed description of the function/product.

Exhibit D – Customized Changes to Symphony

The District has implemented a number of customized modifications to the standard Symphony software in order to provide additional functionality.

The District requests the same functionality in the proposed system, either as a native software feature or as customized modification.

Additionally, the District is interested in certain customized features that are not available in our current ILS. Please indicate if those features are available or could be added.

The District further requests one hundred hours of consulting/development for customized modifications to satisfy “To Be Added” functionality in Exhibit D or for future use.

Customized Functionality	Already Available	Importance	Comments
Provide automated student data load: Data to be extracted from files automatically SFTP'd from local school districts. Uploaded records should automatically create new student records or update student account, excluding the PIN, if currently in the system. Additionally, new student records will populate specified custom patron fields (School District, School, and Grade), if the student file does not contain a PIN one is automatically generated for them based on DDMM of the birthdate. The data load allows the specification of the home library, creation date, expiration date and last activity date when the student record is initially created.	Currently Available	Mandatory	
Provide a random sample inventory report. The report should list a pre-specified number of items located at each library. Report should randomly select items listed at the library including items that are checked out or set to lost/missing.	Currently Available	Mandatory	
Provide a custom fund balance report to be run on demand by Finance staff. Report uses a pre-specified data format in order for staff to directly upload paid invoice data from the ILS into the District’s financial system ERP provided by Tyler Technologies.	Currently Available	Mandatory	
Provide the ability to automatically send selected patron hold, overdue and billing notification data to UMS. Data will be in defined format in order to be ingested by UMS phone notification system	Currently Available	Mandatory	

Integrated Library Management System

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<p>Provide the ability to display in the patron "My Account" the total amount patrons have saved by checking out physical items. Item amount is to be a cumulative total and not affected if the item is removed from the collection</p>	<p>Currently Available</p>	<p>Desired</p>	
<p>Provide the ability for patrons to subscribe to a favorite author automatic hold system. Patrons should be placed automatically on hold for new titles by selected favorite authors. Order of holds being placed should be randomized so as not to favor specific patrons. Patrons should also be able to specify format of title.</p>	<p>Not currently integrated into ILS</p>	<p>Desired</p>	

Exhibit E- – Vendor System Specifications and Requirements

1. System Software – SaaS Solution

- A. Describe the company's disaster recovery and business service continuity strategy.
- B. Provide a high-level diagram of the physical architecture of your firm's Data Center/Network (as it relates to the hosted solution) showing firewalls, DMZ, servers (application and database), storage devices and redundancies in the architecture.
- C. Describe the backup process for all system data, including the frequency of the backup schedule and the amount of time it would take to rebuild a system based solely on that backup data.
- D. Describe how the vendor maintains industry best practices for data protection and security in the data centers of the hosted environment. Describe the security measures in place and how the system complies with HIPAA /GDPR / FERPA requirements both "at rest" and "in transit."
- E. Describe all policies regarding data ownership. Who owns the data that they create and store in the solution? Are there restrictions or costs related to how this data can be used and/or re-purposed? What costs are involved if the District, at a later date, decides to migrate to a different vendor?
- F. Describe vendor security incident response plan.
- G. Describe mechanism for continuous monitoring of system performance and uptime to meet agreed upon service level commitments.
- H. Describe the software development process and which standards are used.
- I. Provide any completed organizational information technology audits.
- J. Describe how the ILS keeps a log of each transaction which alters the database. Logs are date and time stamped so as to allow the system to reconstruct activity for any period.

2. Client Hardware and Software (including Web based client)

- A. Describe system’s licensing model. To include both staff desktop client, and, if available, web-based client.
- B. Describe single sign on options, including authentication options such as MFA or OAUTH and Office 365 integrations.
- C. Describe distribution of upgrades and enhancements to the client, including the frequency of patches and required revisions. Include estimated downtime for scheduled upgrades or maintenance.
- D. Specify software and drivers needed for staff or web-based clients to communicate with the server.
- E. Describe minimum and optimum computer requirements for staff clients including Chromebooks, MAC, and mobile devices.

- F. Describe operating systems and internet browsers necessary to properly run the system and identify any internet browsers that cannot be used to properly run the system. System must not use Internet Explorer.
- G. Describe how the system interacts with RFID hardware and setting of the security bit.
- H. Describe staff capabilities to personalize and customize the workstation interface.
- I. Specify whether client profiles and configurations are maintained on the server or on the workstation and describe the process for preserving personalized settings through software upgrades.
- J. Specify if staff need administrative level privileges on staff pc to either install updates or change any settings.

3. Development partnership

PPLD is interested in becoming a development partner with the ILS vendor selected.

- A. Specify what opportunities are currently available.
- B. Specify Development Partner library expectations.
- C. Provide Development Partner agreement documentation.

Exhibit F – Summary of Costs

Quote unit prices, maintenance rates, delivery charge, installation charge, and training costs for all components of the system on the summary form provided below. You may attach supplemental information to this summary. All prices, quotes, or proposals are to remain firm for at least 90 days after the opening date for proposals.

Pricing Form for		(Vendor Name)					
Component	Unit Price	No. Units	Extended Total Price	Warranty Period	Annual maintenance Years 2-3	Annual maintenance Year 4	Annual maintenance Year 5
IIS Software licensing (per module if applicable)							
API Subscription Suite (if billed separately)							
Other 3 rd Party Licensing							
IIS Client (staff use) software licensing							
IIS Web based client (staff use) if licensed separately							
IIS Discovery Platform (if not included with OPAC)							
Ad hoc Reporting System							
One hundred hours of customized modifications to the IIS (non-expiring)							
Delivery							
Installation							

Training							
Travel & Per Diem							
Total System and Maintenance Costs							
Optional: Room Reservation System							
Optional: Calendaring (Event) system							
Optional: 6 month review of Acquisitions processes							
Optional: Mobile app							

PROFESSIONAL SERVICES FEES:

List job title, job description and hourly rate for professional services that may be needed for future custom programming or other services requested by the District.

Job Title	Job Description	Hourly Rate

Travel Reimbursement:

Travel expense for the system purchase, delivery, installation, and training are to be included in Exhibit F. Travel expense for other professional services requested by the District will be reimbursed as follows:

- A. Air Travel at least expensive rate for coach class
- B. Reasonable hotel accommodations
- C. Per diem (meal and rental car)
 - i. A daily rate for hotel; and per diem may require approval by the District. Travel time is not reimbursable.