



**REQUEST FOR PROPOSAL
For
Outdoor Hold Lockers
PIKES PEAK LIBRARY DISTRICT
Colorado Springs, CO**

RFP #520-24-01

The Pikes Peak Library District (PPLD) invites qualified vendors with the qualifications as stated herein, and are licensed in the State of Colorado, to submit a response to a Request for Proposal (RFP) for Library 21c, located at 1175 Chapel Hills Dr., Colorado Springs, CO 80920.

Proposal deadline is **2 p.m. MST on Friday, April 19, 2024.**

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1. Terms & Condition

- 1.1. Purpose: PPLD is seeking proposals from qualified vendors to provide and support for Outdoor Library Holds Pickup Lockers. This project is targeted to be completed by November 30, 2024.
- 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 Justin Goodwin, Chief Information Technology Officer, at jugoodwin@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, physical or mental disability, or any other protect status.
- 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 pertained 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.

1.11. 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.

1.12. RFP Schedule:

RFP released Friday, 22 March 2024
Deadline for final questions..... Friday, 29 March 2024
Deadline to return answered questions Monday, 1 April 2024
Proposals due..... Friday, 19 April 2024 at 2:00pm
Product onsite demonstration Monday, May 6th, 2024, 8:00 a.m.
Board Review and Decision Wednesday, 15 May 2024
Award Notification on or about Friday, 17 May 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. Addendum A - PROPOSAL COVER SHEET

2.1.2.2. Addendum B - CHECKLIST, QUESTIONNAIRE, AND PRICING

Vendors are requested to submit a response for each numbered or lettered item of Addendum B, the response must be in the same format and sequence as in the RFP. The response must include description, schedules, when required, and any additional clarifying information, such as appendices, charts, diagrams, etc.

2.1.2.3. Addendum C – IMMIGRATION CLAUSE FOR CONTRACTS

2.1.2.4. 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, on 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 copies and soft copy (i.e., flash drive, magnetic media, etc.) of the Proposal to:

Pikes Peak Library District
Attn: Kim Hoggatt
Finance Office
RFP #
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, 19 April 2024, no later than 2 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 proposal 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.	Excess (umbrella) Liability	\$1,000,000
2.1.12.4.	Per Truck	\$100,000
2.1.12.5.	Per Occurrence	\$1,000,000
2.1.12.6.	Worker's Compensation liability that meets statutory requirements.	

2.1.13. Indemnification: The proposer agrees to, and shall, defend, release, and indemnify, and save and hold harmless PPLD, its officer, 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. 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. The 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. 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
25	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.
65	Technical Requirements – Third party integration, key functionality, onsite/online demonstrations, vendor technical requirements
10	Vendor’s references
100 Total Points	

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. 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.

2.3.4. 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.

2.3.5. 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 as well as PPLD's mobile app.

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.

Pikes Peak Library District is seeking a vendor to complement its existing work and commitment to the community with the installation of remote check-out lockers at four of its sixteen facilities: Cheyenne Mountain, Ruth Holley, Penrose, and Sand Creek. Remote lockers are a secure way to circulate materials outside of the library locations and standard "business hours," allowing patrons to access its robust collections.

PPLD's mission is to: "Cultivate spaces for belonging, personal growth, and strong communities."

3.1.1. Service Specifications:

The specifications of this project, attached:

Addendum A - Proposal Cover Sheet

Addendum B - Checklist, Questionnaire, and Pricing Form

Addendum C - Immigration Clause for Contracts

Exhibit A - Vendor System Specifications and Requirements

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.

3.4. The contractor shall ensure all materials and workmanship are in accordance with industry standards and laws.

3.5. No non-employees, employee's significant others, employee's children, or employee's pet(s) shall be permitted on the jobsite, by the Contractor, during the performance of this contract.

4. Vendor Qualification and Information

The following information and documents must be included in submitted proposal:

- 4.1. Provide the name of the proposing vendor, address, telephone and primary contact person.
- 4.2. Include an affirmative statement that the vendor is licensed in the State of Colorado.
- 4.3. State the size of the vendor and provide a vendor history summary.
- 4.4. Your organization’s qualifications and experience. If you have experience with PPLD Libraries, describe your current or past relationship. Describe any similar projects performed by your organization.
- 4.5. Provide references from minimum three (3) recent similar projects including name, telephone number and a brief statement describing their association with your vendor (e.g., other library, educational or public sector clients). References from the Colorado Front Range are also preferred.
- 4.6. Provide the resume of the person that will be assigned as the lead on this project.
- 4.7. Any other information you feel should be considered in the selection process.

5. Pricing

- 5.1. Minimum Services: PPLD is looking for the best-value proposal that meets the needs of the district to include all cost aspects of service.

Please include all price information in the table(s) located on Addendum B; Checklist, Questionnaire, and Pricing Form.

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 vendor) 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. _____ A proof of eligibility to operate in El Paso County and the State of Colorado is attached.
- i. _____ There have been no claims, litigation, or other issues filed or pending against our firm in the past 5 years except as listed below.

- j. _____ 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, QUESTIONNAIRE, AND PRICING FORM

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

A. SIZE and AGE of your vendor _____

B. VENDOR’S EXPERIENCE:

1. Contractor qualifications:

- 1.1. Licensed to perform all requested work in the state of Colorado (license attached).
- 1.2. Any procurements/purchases must be completed in compliance with [2 CFR 200.317-326](#)

Provide **unit cost** information as requested. All costs stated shall be "complete": costs to include materials as specified on the plans, labor, delivery to site, OH&P, applicable taxes, permits, and one year warranty for all materials and workmanship. Total bid shall individually list all components of the hold locker system with component price as described in Exhibit A, #1.

BASE BID

The submittal of this bid form implies that the contractor can adequately staff and schedule all work at the required time and has the resources available to procure all required materials at the required time. All costs indicated shall be maintained by the contractor for not less than 30 days from the submittal date and shall be maintained throughout the duration of the contract after award.

E. PERSONNEL’S EXPERIENCE. Please attach certifications qualifying your vendor.

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 – Vendor System Specifications and Requirements

1. Solution Specifications

- A. Describe all software, hardware, and/or integrations that are required in order to enable functionality from the proposed solution. If the Proposal requires the purchase of specialized software or hardware in order to achieve the full use of the equipment or technology, the Proposal must identify the software or hardware along with an associated estimated cost of the purchase and any annual licensing and/or maintenance fees. If the Proposal requires connectivity to a particular software system in order to achieve the full use of the equipment or technology, the Proposal must specify the software system. Pricing information to be included in Addendum B.
- B. Describe the Vendor's recommended solution(s) for locker installation at four (4) Pikes Peak Library District's locations. In the Proposal, assume that locker installations will be external to the library building and will be facing a parking lot for quick self-service access. In the recommendation, include (1) a description of the equipment and technology used in the recommendation, (2) description of the function and workflow of the solution, and (3) the modularity of the proposed solution. How many lockers per bank? Will awnings and custom wraps be included in the solution?
- C. Provide a complete description of the warranty to be included and guarantees for materials, labor, and services provided in the performance of this contract.
- D. Describe a detailed project implementation plan and estimated timeline (including number of days for execution of plan after contract signing).
- E. Describe the physical requirements of the proposed solution and the requirements of the space it is to be placed within (i.e. space constraints, surface constraints, required data/power connections, etc.).
- F. Describe the infrastructure of all aspects of the proposed solution including where information is stored (e.g. hosted solution, web-based SAAS, on-premise solution, etc.)
- G. Describe weatherproofing features included in proposed solution.
- H. Describe what anti-vandalism and anti-theft measures are incorporated in the proposed solution.

2. Service Delivery

- A. Describe how the proposed solution allows a customer to request their material be routed to the lockers.
- B. Solution must meet ADA requirements and provide options for varied levels of accessibility. Please describe how your solution meets these requirements.
- C. Describe how the proposed solution allows customers to track their holds, and what information is available to the patron on the device screen and if there are any other functions the patron can perform using the screen or via an online portal.
- D. Describe the process of how materials are handled from the time they reach the branch that will be filling the hold, are checked in, assigned a locker, and placed in the assigned locker.
- E. Describe the process of removing expired holds from assigned lockers.
- F. Describe how the proposed solution allows a customer to collect and check out the materials they have requested from lockers. Please include if the proposed solution offers the ability to email or print a receipt of materials checked out.
- G. The solution must provide the ability for the customer, when retrieving holds, to open their assigned locker by scanning in their library account barcode and by typing in the barcode. If there are other options outside of these requirements, please describe those processes. Also describe if a PIN is an option.
- H. Describe how the proposed solution checks materials out to the customer.

- I. Describe how the proposed solution will prevent customers from retrieving holds if they have been blocked from checking out more items.
- J. Describe how the proposed solution identifies and manages locker capacity and vacant lockers.
- K. Describe how the proposed solution will combine holds into one locker if the customer receives more than one item during the allotted pickup time.
- L. Solution must provide the ability for staff to override assigned locker or assign an additional locker if needed. Please describe the process.
- M. Describe any remote access that staff will have to the lockers.
- N. Does the solution provide the ability for all locker doors to be opened by staff at the same time? If so, please describe this process.
- O. Describe how the proposed solution allows the library to add fields to, modify, or remove any or all fields from the user interface.

3. Communication

- A. Describe how the proposed solution notifies customers about their requests. Identify whether this is a function of an integration or whether it is native to the proposed solution.
- B. Describe how the library may configure/customize the notifications sent to customers within the proposed solution if that feature is native to the solution.
- C. Describe how the proposed solution will work if there is an internet disruption.

4. Reporting

- A. Describe how the proposed solution provides (1) standard reports, (2) reports that can be modified by an administrator, and (3) reports that can be modified by an administrator and shared with others.
- B. Describe how the proposed solution allows technicians to create custom reports.
- C. Describe how the proposed solution allows reporting to be automated and in what formats (email, attached PDF, etc).

5. Vendor Support Services

- A. Describe technical support available for the proposed solution. In your description, include the channels of communication that are available (i.e., chat, email, phone, forums), escalation strategy, target response times, and any Vendor-sponsored online forums or message boards with an active user community. What hours are support services available and what weekend support is available?
- B. Describe the support available for the setup and implementation of the proposed solution. In your description, include the types of managed services or support services offered for the implementation and maintenance of the system.
- C. Describe what services or partnerships exist to assist with service delivery, delivery of materials, and streamlining library processes.
- D. Describe vendor's experience doing a similar scope of work in the past with a library ILS system.

6. Remote Support

- A. Does the proposed solution provide or integrate with a tool that allows technicians to remotely troubleshoot or configure the proposed solution? If so, please provide a brief description of this tool, including how it is accessed, what features of the proposed solution are supported through remote access, and whether the tool is built in or external to the proposed solution.

7. Training

- A. Provide a description of all training and knowledge transfer available for the proposed solution for all persons affected by the proposed solution, including end-users and administrators. Include a description of any different delivery methods (e.g., online, in person, Zoom or similar), course materials provided, and the number of staff included without incurring additional charges for attendees.

8. Integration

- A. Describe how the proposed solution integrates with the Symphony ILS; SIP2, Web Services or API.
- B. Provide a comprehensive list of all compatible ILS's.

9. Security

- A. The proposed solution must be able to meet security requirements based on an accepted framework (e.g. NIST, ISO, etc.). Describe all IT Security Compliance certifications, attestations or audits your systems have earned (e.g. SOC2, PCI, etc.)
- B. The proposed solution must be able to support Single Sign-On by integrating with the library's Office 365 profile for authentication services.
- C. Describe how the proposed solution supports role-based access and grants each such role different security access within the proposed solution. Include in the description how this can be used to limit and/or expand access to certain information by a certain business unit or group, and the degree to which user roles can be configured.
- D. Describe the type of encryption used as well as any other security features or limitations with the proposed solution.

10. Configuration

- A. Provide a description of any additional features included in the proposed solution which are configurable that are not listed above.
- B. Provide a description of the features included in the proposed solution which are customizable that are not listed above.

11. Vendor Information

- A. Describe how long Vendor has been in business under the current name and/or "doing business as."
- B. Describe Vendor's experience working with a governmental agency.
- C. Please provide at least three (3) references within the last three (3) years for projects of similar work, scope, and/or duration.