#### CITY OF BURLINGTON

**Request for Proposals**

**City of Burlington, Vermont**

**Issued: December 2, 2019**

**Questions Due by December 9, 2019**

**Answers Posted by 5 pm, December 13, 2019**

**Proposals Due: December 23, 2019**

**BACKGROUND**

The Fletcher Free Library is seeking proposals for an Integrated Library System (ILS) software with associated support including installation, migration, initial and continuing staff training. The Library intends contract for a term of three years with the option for renewal in the fourth and fifth year.

The Fletcher Free Library (“the Library”) is the largest public library in the State of Vermont. The Library is a municipal department of the City of Burlington.

The Library is currently running Polaris 6.3.

**ATTACHMENTS**

1. Fletcher Free Library System Profile
2. City of Burlington Draft Agreement
3. City Of Burlington Standard Conditions

**SCOPE OF WORK**

* The vendor/software must support the attached system profile
* The vendor must:
  + Provide proven, reliable offsite hosting services;
  + Provide back-ups and reinstatement of back-ups if needed due to catastrophic situations;
  + Provide system support 7 days a week, 9AM – 8 PM;
  + Provide online and virtual training options prior to migration, with pricing for both, as well as information and pricing for ongoing training around software upgrades and hires;
* The software solution must:
  + Include robust modules for all major ILS functions including cataloging, acquisitions, circulation, serials, and reports;
  + Allow flexible reformatting of notifications, and hold slips, receipts, and reports for use via multiple communication options, including email, print & SMS with:
    - Ability to customize wording and graphics for messages, notices & receipts;
    - Ability to cascade failed notices to a secondary method of communication;
    - History of notices sent;
  + Include proxy services for off-site authentication;
  + Include SIP2 capability or other comparable methods for querying the patron database to confirm a cardholder’s validity;
  + Be compatible with current hardware in use;
  + Provide offline circulation services, and mobile access to staff functions;
  + Support EDI/9XX ordering and invoicing with vendors including Brodart, Ingram, Playaway and Midwest Tape;
  + Allow for batch import, editing and processing of MARC records;
  + Allow for the ability to customize, generate and print spine labels;
  + Allow for budget management and tracking, with the ability to create, modify, delete and display fund accounts and make ad-hoc changes to the budget;
  + Integrate digital content with a variety of third-party systems, such as Overdrive, SIP2, Hoopla, Kanopy, RBdigital, Syndetics Solutions, Novelist, MarcEdit (Z39.50, in and out), OCLC (Z39.50, in and out), and Envisionware;
  + Ideally, be able to support multiple branches;
  + Provide advanced search for materials in the staff client, with ability to filter by numerous fields including, but not limited to: keyword, title, author, ISBN/ISSN;
  + Support enhanced patron records with all fields searchable including, but not limited to, name, telephone, address, and email;
  + Allow notes on patron accounts for internal use with additional external option desired;
  + Allow patrons to update information and manage own account including renewals, payment, cancel/freeze holds via OPAC account login;
  + Offer robust statistical reporting features including but not limited to:
    - Flexible date range options with granularity to the day;
    - Chunking by collection that lists records with field selection;
    - In-house use reports;
    - Automatic scheduling and emailing functions;
    - Ability for reports to be easily exported as XML, CSV and plain text;
    - Ability to build custom reports using an intuitive program or industry standard language;
    - Integration with Clover to handle Interlibrary Loan (ILL) notices, checkouts and fees.
* The online public access catalog (OPAC) must:
  + Have a responsive, mobile and touchscreen-optimized web design;
  + Support enhanced discovery with e-content integration;
  + Provide advanced searching options with:
    - Faceted refinement options persisting through multiple results refinements;
    - Persistent search box on every OPAC page.

**PROPOSAL REQUIREMENTS**

Qualified vendors must provide:

* Cover letter addressing each of the above requirements and outlining a proposed schedule of implementation by May 15, 2019 including training, if selected;
* Recommended bandwidth and internet browser requirements for a hosted service;
* A detailed listing of the environments (Dedicated, hosted, shared) for application software, installation software, terminal servers and database servers;
* Information about costs for system migration, installation, annual maintenance & support, annual hosting fees, and any other costs associated with said software and support services, including itemized cost of any items in “Scope of Service/Criteria/Requirements” not included in the standard software;
* Detailed information about system and network security features, guarantees and backup planning;
* Standard license agreement;
* Three references from public libraries who have migrated to their software from Polaris, if relevant.

**SUBMISSIONS**

To be considered, please submit an electronic and/or physical copy by 6:00 p.m. EST on December 23, 2020 to:

Emer Pond Feeney

Assistant Director

Fletcher Free Library

235 College Street

Burlington, Vermont 05401

efeeney@burlingtonvt.gov

**SELECTION PROCESS AND RESERVATION OF RIGHTS**

Proposals will be reviewed and evaluated by Library staff based on the information provided in the proposal. Fletcher Free Library reserves the right to obtain clarification of any point in a vendor’s proposal or to obtain additional information necessary to properly evaluate a proposal. Failure of a vendor to respond to such a request for additional information or clarification may result in rejection of the vendor’s proposal. Vendors who submit qualifying proposals may be asked to for an interview and a demonstration their product.

If vendor is selected to demonstrate its product, it should be prepared to provide a history of the company, including identifying past and pending litigation, and current solvency.

**REJECTION OF PROPOSALS**

The City reserves the right to reject any or all proposals, to negotiate with one or more parties, or to award the contract to the proposal the City deems will meet its best interests, even if that proposal is not the lowest bid. The City reserves the right to re-advertise for additional proposals and to extend the deadline for submission of the proposals. This Request for Proposals in no way obligates the City to award a contract.

**CONTRACTING**

The Vendor, prior to being awarded a contract, shall apply for registration with the Vermont Secretary of State's Office to do business in the State of Vermont, if not already so registered. The registration form may be obtained from the Vermont Secretary of State, 128 State Street, Montpelier, VT 05633-1101, PH: 802-828-2363, Toll-free: 800-439-8683; Vermont Relay Service – 711; web site: <https://www.sec.state.vt.us/>. The contract will not be executed until the Vendor is registered with the Secretary of State's Office. The successful Vendor will be expected to execute sub-agreements for each sub-consultant named in the proposal upon award of this contract.

Prior to beginning any work, the Vendor shall obtain Insurance Coverage in accordance with the Burlington Standard Conditions (Attachment C in this RFP). The certificate of insurance coverage shall be documented on forms acceptable to the City.

If the award of the contract aggrieves any firms, they must appeal in writing to the City. The appeal must be post-marked within seven (7) calendar days following the date of written notice to award the contract.

**Agreement Requirements**

The selected consultant will be required to execute a contract with the City on the terms and conditions required by the City, including but not limited those in the Burlington Consultant Conditions (Attachment C) and the attached Draft Agreement (Attachment B).

**LIMITATIONS OF LIABILITY**

The City assumes no responsibility or liability for costs incurred by parties responding to this Request for Proposals, or responding to any further requests for interviews, additional data, etc., prior to the issuance of the contract.

**COSTS ASSOCIATED WITH PROPOSAL**

Any costs incurred by any person or entity in preparing, submitting, or presenting a proposal are the sole responsibility of that person or entity. The City will not reimburse any person or entity for any costs incurred.

**INDEMNIFICATION**

Any party responding to this Request for Proposals is acting in an independent capacity and not as an officer or employee of the City. Any party responding to this Request for Proposals will be required to indemnify, defend, and hold harmless the City, its officers, and employees from all liability and any claims, suits, expenses, losses, judgments, and damages arising as a result of the responding party’s acts and/or omissions in or related to the submission of the response.

**OWNERSHIP OF DOCUMENTS**

Any materials submitted to the City in response to this Request for Proposals shall become the property of the City unless another arrangement is made by written agreement between the City and the responding party. The responding party may retain copies of the original documents.

**PUBLIC RECORDS**

Any and all records submitted to the City, whether electronic, paper, or otherwise recorded, are subject to the Vermont Public Records Act. The determination of how those records must be handled is solely within the purview of City. All records the responding party considers to be trade secrets, as that term is defined by subsection 317(c)(9) of the Vermont Public Records Act, or that the responding party otherwise seeks to have the City consider as exempt must be identified clearly and specifically at the time of submission. It is not sufficient to merely state generally that a proposal is proprietary, contains a trade secret, or is otherwise exempt. Particular records, pages, and sections which are believed to be exempt must be specifically identified as such and must be separated from other records with a convincing explanation and rationale sufficient to justify each exemption from release consistent with Section 317 of Title 1 of the Vermont Statutes Annotated.