



PCIN

The
PERTH COUNTY
INFORMATION NETWORK

Request for Proposal For An Integrated Library System (ILS) 16-01

Issued December 6, 2016

Key Dates:

Declaration of Intent to Bid due January 10, 2017 4:30pm EST

Proposals due February 28, 2017 4:30pm EST

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1. General Information

1.1. Background

The Perth County Information Network (PCIN) is a computerized network of five library systems across the County of Perth located in Southwestern Ontario. PCIN was established in 2000 in order to share library resources through the use of a shared Integrated Library System. PCIN's five member libraries serve a population of 75,000 through seven service locations.

PCIN is comprised of autonomous member libraries with a board of governors made up of representatives from member library boards. Members share the costs associated with the Integrated Library System (ILS), technical support and network licensing. Through PCIN, members partake in cooperative borrowing and shared services such as cataloguing, computer support, and purchasing.

PCIN Member libraries include:

- North Perth Public Library (3 locations)
- Perth East Public Library
- St. Mary's Public Library
- Stratford Public Library
- West Perth Public Library

Stratford Public Library provides and administers the technological portion of services to PCIN. Stratford Public Library is the primary contact for the ILS on behalf of PCIN and is authorized to sign legal contacts on behalf of same.

PCIN currently runs on SirsiDynix's Horizon 7.5.4. PCIN has used Horizon since 2005, the HIP catalogue since 2005 and BiblioCommons discovery catalogue since 2009. The BookMyne app for Android and iOS is available for public use. Staff functions such as circulation, mobile circulation, cataloguing, inventory and system reports are a key management function for PCIN and the participating libraries. Currently member libraries have access to Web Reporter for locally created statistical reports. Each location is responsible for their own cataloguing of materials and collection maintenance.

Statistics (2015):

| | |
|--------------------------------|---------|
| Number of Distinct Libraries | 5 |
| Number of Locations (Branches) | 7 |
| Total Customers | 43,439 |
| Total Bibliographic Records | 173,257 |
| Total Item Records | 218,025 |
| Total Authority Records | 259,442 |
| Total Checkouts and Renewals | 613,294 |
| Total Holds Filled | 145,466 |
| Total Transits | 67,690 |
| Staff Workstations | 49 |

1.2. Overall Intent and Purpose

PCIN is seeking proposals for an Integrated Library System for the 5 member libraries.

1.3. Minimum Requirements for ILS

PCIN expects that our next system will have all of the functionality of our current system as outlined below:

The following modules must be currently available and not in beta test:

- Circulation
- Cataloguing
- Online Catalogue
- Reporting

The system must support the following consortium features:

- Various levels of policy control; consortium, library, and branch
- Consortium level customer and material types
- Policies defined at consortium and local library level, including loan periods, grace periods, fines and fees, and customer delinquency thresholds
- Search displays can be configured to show local library holdings first
- Vendor must have demonstrated experience with consortia, including at least two current customers

The system must support multiple SIP2 interfaces, including:

- Public Internet management and print systems including Envisionware and Useful
- Electronic resources vendors including Overdrive, Recorded Books, Freegal, Zinio, Hoopla
- Self-check and RFID systems including Bibliotheca (3M), Checkpoint, Envisionware, and Tech Logic

The system must be able to interface with the following third party vendors:

- Enhanced content providers including Syndetics and NoveList
- Print and AV vendors including Library Services Centre, Brodart, Midwest Tape, EBSCO, Gale/Cengage, Proquest, and Recorded Books

A web based staff client (including mobile circulation) that will work on multiple versions of multiple web browsers and tablets must be in general release or in development.

1.4. Project Timeline

The timeline supplied is the PCIN's best estimate and does not represent a binding agreement on behalf of the consortium.

- RFP Issued December 6, 2016
- Declaration of Intent to Bid January 10, 2017
- Deadline for Vendor Questions January 31, 2017
- Addendum Issued February 7, 2017
- Proposals Due February 28, 2017
- On Site Vendor Demonstrations March 20-24, 2017
- Recommendation of preferred vendor April 2017
- Board Review June 2017
- Contract Signed June 2017
- Start Project September 5, 2017
- Desired Completion November 30, 2017

1.5. Official Contact

The official contact for this Request for Proposal:

Krista Robinson
Systems Librarian
Stratford Public Library
19 St. Andrew Street
Stratford, ON N5A 1A2
519-271-0220 x112
krobinson@pcin.on.ca

In order to maintain a fair and impartial selection process, contact with other PCIN staff or staff at member libraries about this RFP is prohibited. Failure to abide by this policy may result in disqualification of proposal. Suspected errors in the proposal should be immediately reported in writing to the official contact.

Questions received after the deadline may not receive a timely response or may not be answered. Answers to questions will be distributed to all registered vendors/posted on the Library's website in the form of an addendum.

Responding vendors are prohibited from communicating in any other manner about this project with any other City and/or Library employee from the date of issuance of this proposal until the final selection. Other means of communications or contact will disqualify the submitting firm.

1.6. Procedure for Submission of Proposals

Submit five print copies and one electronic (PDF) copy on a USB drive of your proposal. All proposals must be enclosed in a sealed envelope or appropriate packaging, with "Proposal" clearly marked on the outside. Mailed or hand-delivered proposals should be addressed and delivered to:

Perth County Information Network
Attn: Krista Robinson, Systems Librarian
c/o Stratford Public Library
19 St. Andrew Street
Stratford, ON
N5A 1A2

Any proposal received after the hour and date specified (4:30 pm on February 28, 2017) will not be considered. Any modification of a proposal received after the closing date and time of the RFP will likewise not be considered. Vendor is solely responsible for the delivery and drop-off of its proposal to the correct location during business hours before the date and hour set for the opening of proposals.

Vendors must run an accessibility check on their proposal and address any potential issues prior to submission.

1.7. Vendor Criteria & Evaluation

Written proposals will be evaluated by a committee comprised of representatives from each of the member libraries and key systems staff. Finalist vendors will be invited to provide an in-depth demonstration. Attendance will be open to all PCIN member library staff who will be encouraged to fill out evaluation forms at the end of each demonstration. Staff evaluations will be taken into consideration by the committee when determining final scores. The scoring criteria are as follows:

| | Written Proposal | Product Demo | Total Possible Points | Percent of Total |
|---|------------------|--------------|-----------------------|------------------|
| Corporate History | 10 | | 10 | 6% |
| Prior Experience | 8 | | 8 | 5% |
| Cost | 35 | | 35 | 20% |
| Implementation & Training | 25 | | 25 | 14% |
| Staff functionality | 10 | 50 | 60 | 34% |
| Technical requirements | 15 | | 15 | 8.5% |
| Compatibility with Third Party Services | 15 | | 15 | 8.5% |
| References | 7 | | 7 | 4% |
| Total | 125 | 50 | 175 | 100% |

2. Overall Intent Outcomes Desired

Members of PCIN would like to reexamine the ILS marketplace in order to determine if our current vendor offers the best solution for our network. We wish to contract with a single vendor for a fully functional staff client that is easy to use, provides robust reporting and statistical analysis, and a search product that is intuitive for our customers, quickly returns accurate search results and account access.

Tell us how your products will meet our needs and exceed our expectations.

Provide 3 references of customers similar in size and complexity (preferably Canadian)

3. Corporate Background

Provide a brief history of your company and the corporate vision for its future. Include a succession plan, where appropriate.

What makes your company unique?

What new library automation developments are you most excited about? Can you tell us about any innovative products that are just released, soon to be released, or in development? Where are you concentrating your development efforts?

4. Staff Modules

As a unique consortium of independent libraries, some with branches, PCIN requires the following consortium features:

- Three levels of policy control: consortium, library, and branch
- Consortium level customer profiles and item types
- Policies defined at consortium and local library level, including library calendar, loan periods, grace periods, fines and fees (including no fine option), and customer delinquency thresholds
- Robust holds management in a consortia environment
- Search displays that can be configured to show local library holdings first

Describe how your system configuration options can meet these needs.

Complying with Accessibility Legislation is very important for PCIN. Describe how your systems provides AODA / ADA friendly displays and functions such as adjustable font sizes and voice prompts for both staff and customers.

4.1. Circulation

The PCIN shared system offers full reciprocal borrowing to all registered borrowers, and customer policies are determined by customer profile assigned by the library of registration. Item loan policies are determined by the owning library. The following features are critical to PCIN libraries:

- Multiple methods of customer notification for holds and overdues, including print, email, and text
- Courtesy email reminders before items are due
- A hold system that allows:

- The owning library to define some item types as local hold or no hold
- Preference to locally available copies
- Load balancing across member libraries when filling holds
- Volume level holds for multi-part/disc titles and periodicals
- Ability to circulate a variety of material types
- Mobile circulation for Android and iOS devices that can be used in the library building or in the community. Wireless and offline capabilities must be available.
- Ability to print hold slips for self-serve hold shelf pickup
- Advanced searching, sorting, limiting ability for various standard fields

Desired features include:

- The ability to limit borrowing activity for a specific customer profile
- The ability to merge duplicate customer records
- A staff interface that offers critical functionality with minimal training
- Automated customer notification by phone

Explain how your system will accommodate these features in a consortia environment.

Briefly share specific features of your system's circulation module not covered here that you believe will be of special interest to PCIN and/or differentiate you from other systems. Your response should be no longer than one page.

4.2. OPAC

PCIN has been using BiblioCommons as a discovery layers since 2009 and is highly committed to this service. That being said, due to the rural nature of Perth County and limited high speed internet access in some areas, there are library customers who continue to choose our traditional library OPAC (HIP) to access their account. This a search product that is intuitive for our customers, quickly returns accurate search results and provides full account management.

Explain how your system will accommodate remote searching for those with limited bandwidth.

Is your ILS compatible with BiblioCommons? Have you experience working with BiblioCommons libraries? In a SaaS environment?

4.3. Cataloguing

The bibliographic database is the heart of the shared system and every effort is made to keep it as clean as possible.

Records are received from local book and AV vendors. All records are edited before they are loaded into the database. The PCIN network is working towards RDA compliance. We require the cataloguing module to blend seamlessly with the other ILS modules with real time updates. A Z39.50 Copy Cataloguing Client must be included.

Explain how your software will enable us to maintain a clean RDA compliant database.

How is your company approaching the new BIBFRAME standard?

Briefly share specific features of your system's cataloging and authority control modules not covered here that you believe will be of special interest to PCIN and/or differentiate you from other systems. Your response should be no more than one page

4.4. Reports

PCIN member libraries rely on the collection of accurate and comprehensive data for circulation, acquisitions, and general use. We use these reports to monitor our goals and align our resources to fulfill community needs. Staff at all levels working in varying modules need the ability to create ad-hoc on-demand reports. Reports must be able to be broken down by library and branch. It must be possible for any and all member libraries and PCIN staff to run reports at any time regardless of other activity on the system without impacting system performance.

Is a native reporting module part of the ILS? Are statistical/data reports accomplished through a module in the ILS client? Does native reporting have a web based interface? Are native reports generated against real time data? If no native reporting module is available, does your reporting module operate in real time? What database structure is used by the reporting module? Does access to the external reporting module require a specific client or is access web based? Is the reporting module locally hosted or SaaS? Will you be able to pull in our historical statistical data?

Please briefly share specific features of your system's reports module not covered here that you believe will be of special interest to PCIN and/or separate you from other systems. Your response should be no more than one page.

4.5. Other Modules

Are there other modules included in your proposal which would benefit our network? If so, please describe. Your response should be no more than one page

4.6. Third Party Integration

The third party integration of vendor hardware and software solutions is fundamental to our daily processes. If there are issues regarding compatibility please describe them below and provide suggestions for work arounds using your ILS solution.

- Discovery Layer: BiblioCommons
- Enhanced content: Syndetics, LibraryThing for Libraries, NovelList
- Electronic Resources, including but not limited to Overdrive, Hoopla, Zinio. Electronic resource subscriptions vary from one library location to another.
- SIP2 connections with Bibliotheca, Envisionware, Useful

How does your product integrate with the above vendors? How do you identify new electronic resource vendors to partner with? On average how long does it take to develop the APIs once a product is identified?

4.7. Systems Administration

Please describe how much flexibility the Library System Administrator has in editing and customizing the various ILS modules. If it changes between local and SaaS solutions, identify the variances.

5. Implementation, Training and Support

Include a schedule for implementation/migration from existing system. Describe on-site training for the system and purchased modules. PCIN is requesting a general timeline of the vendor's plans and services involved for full implementation of a new ILS. This includes a well-managed transition that maintains reliable and complete data while maintaining current functionality and integrating enhanced functions.

Describe post-migration support including ongoing training, web-based training, user groups and other continuing education opportunities and associated costs.

Administrative training for server administration will be required for three (3) PCIN staff to cover items such as system startup, rebooting the system, backups, restoring from a backup, file recovery, database recovery, recovering from a power outage, regular server maintenance tasks, software upgrades and patches, and other tasks that the Vendor deems necessary for managing the servers effectively.

Describe your customer support structure, hours and resources for support, operating system support and application/data support. What are the hours and days of your live telephone support? Please describe the mechanism for reporting and resolving issues with the system. Also describe how future upgrades are conducted.

The vendor must guarantee support for current releases of all databases and operating systems for the first 5 years after the release. The library would require an ongoing annual contract for support and maintenance.

6. Technical Requirements

PCIN requires a production environment for 50 concurrent staff users as well as a test/training system for all modules.

PCIN currently hosts our ILS in-house with Windows servers. PCIN is open to both in-house ILS solutions and a SaaS solution. Both solutions need a well-documented product with a thorough maintenance and disaster recovery plan.

PCIN is requesting from each vendor responding to the proposal to include both a locally hosted system and a vendor hosted system if both are available.

The system must be compatible with currently owned hardware and operating systems.

| Operating Systems | | |
|---------------------------|----------------------------|-----------------------------|
| Windows 2007 | | |
| Windows 10 | | |
| Apple iOS | | |
| Receipt Printers | Scanners | Label Printers |
| Epson TM-T88V Model 244A | Symbol LS 2208 / 1004-I100 | Dymo Twin Turbo M93085 |
| Epson TM-T88V Model M129H | Symbol LS 1004-I100 | Dymo Label Writer 450 |
| Star SM S220 | Honeywell 3800G | Dymo Label Writer 400 Turbo |
| | Honeywell Xenon 1900 | |
| | Honeywell Hyperion 1300g | |
| | Metrologic Voyager MS9520 | |
| | Metrologic Voyager MS9540 | |
| | Socket Mobile | |

Describe what options are available with your system. Is the option to locally host the system (software and databases) available? Is it mandatory that any software or modules be hosted in the cloud? What is your recommended solution?

Provide recommended hardware configuration for locally hosted production and training servers and associated peripheral equipment.

Provide recommended bandwidth and internet browser requirements for a SaaS solution.

Note the location of the hosting facility for SaaS solutions and the company legally responsible for the facility.

6.1. Reliability

PCIN libraries expect the system to be up 100% of the time during scheduled library hours. PCIN further recognizes that many customers search for books and information at all hours of the day so reliability is essential.

Describe how you will partner with us to provide system reliability. What is your average downtime percentage? How do you mitigate data loss and other risks? What service levels are available and what is your average response time for resolving critical issues? How much scheduled downtime does the

system require daily? Can software upgrades be scheduled outside normal library hours? Is there an extra charge? What is your backup model for a locally hosted system and for SaaS?

7. Cost

PCIN is interested in pricing for 5 and 7 year maintenance agreements for production and test/training environments. Pricing should include migration, installation, service, maintenance, delivery, upgrades, ongoing training, parts, labor, and travel. Provide first year pricing and then an additional 4-year ongoing contract pricing summary. Please provide information on any discounts or special pricing available for early payment, extended contracts or other options. Final costs will be determined during the final negotiation phase with the selected vendor to ensure the inclusion of all appropriate modules and functionality.

If proposing a locally hosted and a SaaS option, provide separate pricing.

All pricing must be provided in Canadian dollars as of the date submitted.

Use the Cost Proposal Templates in **Appendix II** to lay out costings, adding additional fields as necessary.

7.1. Cost Formula

List the factors that will be used to calculate pricing. We anticipate a need for 50 staff user licenses, 700,000 annual circulation (physical and electronic), and 250,000 bibliographic records.

Indicate the cost for exceeding any of these thresholds. Does your circulation total count physical checkouts only or does it also include electronic? Is the “in library use” count included in circulation? Include the cost to add a library to the shared system as well as discount if a library leaves the shared system. Costs should include pricing for external interfaces (including SIP, SIP2, NCIP, Z39.50, EDI), APIs, and third party subscriptions (Syndetics). Include the annual maintenance percentage increase.

7.2. Migration

Cost for migrating the current MSQl database; cost for migrating customer data, and transaction data.. Include cost for on-site assistance on our go-live date.

7.3. Training

PCIN is interested in on premises training for key library staff. Please indicate the number of days proposed, information to be covered, and cost per day. PCIN is also interested in onsite assistance for training local library staff. Please indicate whether you can provide such assistance and the cost per day.

7.4. Hardware

Specify and list costs for production and test/training servers and all peripheral equipment along with ongoing maintenance costs for the life of the contract. Include a 5 year warranty.

Note: PCIN reserves the right to purchase, install, and maintain the recommended hardware independently if it is in the best interest of PCIN to do so.

8. General Terms and Conditions

The following Terms and Conditions are in addition to those that will be contained in the signed contract. To the extent there are any conflicts between this RFP and the signed contract, the Terms and Conditions in the signed contract will prevail.

All responses, inquiries, and correspondence relating to this RFP and all reports, charts, displays, schedules, exhibits, and other documentation produced by the proposal process that are submitted to PCIN as part of the proposal or otherwise shall become the property of PCIN and may be considered public information under applicable law.

8.1. Exclusion of Vendor in Litigation

No bid will be accepted from any vendor inclusive of its subcontractor(s), which has a claim or instituted a legal proceeding or has threatened a claim or instituted a legal proceeding against PCIN or any member library or against whom any member library has a claim or instituted a legal proceeding with respect to any previous contract.

8.2. Effective Term of Proposal

Unless a proposal is expressly rejected by PCIN, all proposals will remain in effect for 210 days subsequent to the proposal opening. PCIN may request that vendor extend the effective period of their proposals. Such requests shall be in writing and will require vendor's written consent to the extension.

Vendor may not withdraw, cancel, or modify its proposal for a period of 210 days after the advertised closing time for the receipt of proposals.

8.3. Award and Negotiations

This Request for Proposal does not obligate PCIN to accept or contract for any expressed or implied services. Likewise, PCIN is not obligated to award a contract pursuant to this RFP.

PCIN reserves the right to enter into discussions with the vendors whose proposals are deemed most advantageous for the purpose of negotiation. If more than one proposal is found to be satisfactory, PCIN reserves the right to negotiate simultaneously with more than one vendor. PCIN also reserves the right to stay with its current ILS provider if it determines that it is the best interest of the participating libraries.

If applicable, PCIN will post a notice to its website recommending a preferred vendor. The notice extends the effective term of the vendor's proposal until the parties sign a contract or determine not to sign a contract.

Contract award and negotiations will be in accordance of Stratford Public Library's Purchasing Policy LG-040.

8.4. Rejection of Proposal and Waiver of Informalities

PCIN, in its sole discretion and authority, may determine that it is in the best interest of PCIN to reject any or all proposals submitted in response to this RFP. PCIN, in its sole discretion and authority, may disregard or waive any informality in the proposals or bidding process.

8.5. Reservations

Vendor must read and understand the solicitation and tailor the proposal and all activities to ensure compliance. PCIN reserves the right to: amend the solicitation; reject any or all of the proposals; and waive minor defects. PCIN may request a clarification, inspect vendor's premises, interview staff, request a presentation, or otherwise verify the contents of the proposal, including information about subcontractors and suppliers. PCIN may request best and final offers where appropriate. PCIN will make all decisions on compliance, evaluation, terms and conditions, and shall make decisions in the best interests of PCIN. Failure of a vendor to comply with requests for information or cooperate may result in the proposal being deemed non-responsive to the solicitation. Submitting a proposal does not entitle a vendor to an award or contract. PCIN is not responsible for and will not pay any costs associated with the preparation and submission of any proposal. Awarded vendor shall not commence, and will not be paid for, any billable work prior to the date all parties execute the contract.

8.6. Incorporating Costs

Bid prices must incorporate any/all peripheral costs including, but not limited to the costs of products/services, delivery/transportation charges, training materials, labour, insurance, applicable taxes, warranty, overhead and profit, etc. that are required by the RFP.

8.7. Harmonized Sales Tax

All submissions shall indicate separately, Harmonized Sales Tax.

8.8. Withdrawal of Proposal

Vendors may withdraw their proposal at any time prior to the date and time for proposal opening. Requests for withdrawal must be made in writing on the vendor's letterhead to the official contact for the RFP. The withdrawal of a tender does not disqualify a vendor from submitting another tender on the same contract.

8.9. Responsibility

A vendor is considered responsible when it has the capability in all respects to fully perform the contract requirements and has the integrity and reliability that will assure good faith performance. PCIN will determine whether PCIN can or should do business with a vendor. PCIN may consider factors including, but not limited to certifications, conflict of interest, financial disclosures, past performance, references (including those found outside the solicitation), compliance with applicable laws, financial responsibility, insurability, equal opportunity compliance, capacity to produce, ability to provide required maintenance services or other matters relating to the vendor's probable ability to deliver the required services within the time and price as specified in this RFP.

8.10. Workplace Safety & Insurance Board

The successful vendor shall furnish a WSIB Clearance Certificate indicating their WSIB firm number, account number and that their account is in good standing. This certificate must be furnished prior to commencement of work, and shall provide additional certificates prior to the expiry date of the certificate on file during the term of the contract to ensure their WSIB account in good standing throughout the contract period.

8.11. Health and Safety Requirements

The classification of Contractors and Sub-Contractors in the Library Health and Safety Policies and Procedures Manual is external to the Library and includes all those individuals or organizations working on a contract for the Library. The health and safety responsibilities attached to this classification include the following:

- Demonstrate the establishment and maintenance of health and safety program, with objectives and standards and will provide qualified workers and meet all applicable legislation as well as Library Health and Safety Policies and Procedures.
- Are held accountable for their health and safety performance.
- Ensure the workers in their employ are aware of the hazardous substances that may be in use at the workplace and wear the appropriate personal protective equipment required for the area.

Proof of the above may be required by the Library at any time from tendering to project completion.

All work performed under this Contract must be carried out in accordance with the terms and conditions of the Occupational Health & Safety Act, R.S.O., 1990, C.01. as amended, the Environmental Protection Act, the Highway Traffic Act and all other applicable Acts, Regulations, or By-Laws governing the work to be performed. Violations of any such legislation may result in a termination of this agreement.

NOTE: Each successful vendor MUST comply with the Library's Health and Safety Program.

8.12. Accessibility Standards for Customer Service:

The Vendor shall comply with applicable Regulations of the Accessibility for Ontarians with Disabilities Act, 2005 (the AODA), with regard to the provision of its goods or services contemplated herein, specifically:

- Ontario Regulation 429/07: Accessibility Standards for Customer Service
- Ontario Regulation 191/11: Integrated Accessibility Standards

The Vendor shall ensure that any employees, agents, volunteers, or others for whom it is at law responsible and who are involved in providing goods and services to the Stratford Public Library and PCIN receive training as required by these regulations.

The Vendor acknowledges that pursuant to the *Accessibility for Ontarians with Disabilities Act, 2005*, the Library must, in deciding to purchase goods or services through its procurement process, consider the accessibility for persons with disabilities to such goods or services. The Library's Accessibility Plan can be found on the website at www.stratford.library.on.ca/accessibility#policies.

8.13. Errors & Omissions

It shall be understood and acknowledged that while this RFP includes specific requirements and specifications, minor items or details not herein specified, but obviously required shall be provided as if specified in conformance with current practices and workmanship. Any omissions, errors or misinterpretation of these requirements and specifications or within the proposal bid shall not relieve the vendor of the responsibility of providing the goods and services as aforesaid.

8.14. Insurance

The vendor shall include with this submission proof of ability to obtain insurance as listed below. The Certificate of Insurance, shall be completed and submitted by the successful vendor, within seven (7)

days of notification of award of this project. This form is to be completed by the vendor's insurance provider(s). This certificate must detail such coverage as provided under the Commercial General Liability policy, Non Owned Automobile Liability policy and Standard Owners Automobile Liability policy, Coverage shall be effected by such Insurer(s) licensed in the Province of Ontario, Canada, and/or acceptable to the Library.

The Certificate of Insurance can be found at www.stratford.library.on.ca/Bids. This certificate must detail such coverage as provided under the Commercial General Liability policy, Non Owned Automobile Liability policy and Standard Owners Automobile Liability policy, Coverage shall be effected by such Insurer(s) licensed in the Province of Ontario, Canada, and/or acceptable to the Library.

The Commercial General Liability shall be on an "Occurrence basis". "Claims Made" and/or Comprehensive General Liability policies are not acceptable unless approved in writing by the Library Chief Executive Officer.

The policies will not be altered to the detriment of the Library, cancelled or allowed to lapse without giving 30 days written notice to the Library and shall remain in force from Contract execution to the end of the Warranty period.

The Library must be included as Additional Insured with respect to the Commercial General Liability policy.

If the Certificate of Insurance is provided in a non-original form (e.g. a facsimile, photocopy or scanned electronic copy), the Vendor acknowledges and agrees that the Library is fully entitled to treat any such Certificate as an original and that the Vendor will be responsible for the accuracy and validity of the information contained therein.

The vendor shall indemnify and hold harmless the Library, its officers and employees from and against any and all liabilities, claims, demands, loss, cost, damages, actions, suits or other proceedings by whomsoever made, directly or indirectly arising out of the project attributable to bodily injury, sickness, disease or death or to damage to or destruction of tangible property caused by acts or omissions of the vendor, its officers, agents, servants, employees, customers, invitees or licensees, or occurring in or on the premises or any part thereof and, as a result of activities under this contract.

Mandatory Coverage:

1. Commercial General Liability (IBC 2100 or its Equivalency)
 - Shall include the Owner, its employees and Consultants as Insureds. The Library and such other entities as directed shall be added as additional Insureds. Minimum acceptable limits are \$2,000,000 per Occurrence.
 - The Commercial General Liability policy must include "Blanket Contractual Liability" and "Cross Liability" endorsements.
 - Maximum Property Damage/Bodily Injury Deductible \$2,500 for which The Contractor assumes full responsibility.
2. Non Owned Automobile Liability Policy:
 - Minimum Limits of Liability \$2,000,000 and coverage must be extended to include vehicles hired under Contract.
3. Standard Owners Automobile Liability Policy:
 - Minimum Limits of Liability \$2,000,000
4. Professional Liability Insurance:
 - Professional liability insurance in the vendor's name not less than \$ 2,000,000 per occurrence.

5. The Library may require coverage for other hazards as required on a project basis.
6. The Library reserves the right to modify the insurance requirements as deemed suitable.

8.15. Infringements and Indemnification

Vendors shall protect, defend and save the Library from suits or actions of every nature and description brought against it, for or on account of any injuries or damages received or sustained by a part or parties, by or from any of the acts of the vendor, and/or the agents, employees, successors, or assigns the vendor.

8.16. Compliance with Laws

The successful vendor shall comply with all applicable laws relating to the RFP, the Submission and any contract resulting there from.

8.17. Publicity

The vendor and its affiliates shall not release for publication any information in connection with the RFP or contract without prior written permission from the Library. However, the Library reserves the right to share with any consultant of their choosing the RFP and submitted proposals to secure expert opinion.

Appendix I

Declaration of Intent to Bid

Required from all Vendors

REQUIRED: All vendors are required to complete this form and email it to krobinson@pcin.on.ca in order for their proposal to be eligible for consideration.

DEADLINE: January 10, 2017 4:30 p.m. EDT

In compliance with the requirements of PCIN RFP for an Integrated Library System, the following business is hereby indicating an intent to submit a proposal:

Company

Name: _____

Address: _____

Website: _____

Representative for all communications related to the RFP:

Name: _____

Address: _____

Phone: _____

Email: _____

The Library Network contact for all questions and correspondence:

Krista Robinson, Systems Librarian
Stratford Public Library
19 St. Andrew Street
Stratford ON N5A 1A2
519-271-0220 x112
krobinson@pcin.on.ca

Appendix II

Cost Proposal – Locally Installed Solution

| | Description | Initial Cost + Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|---|--|-----------------------|--------|--------|--------|--------|
| ILS Hardware and Infrastructure – Locally Installed Solution | | | | | | |
| | Hardware Purchase & Maintenance | | | | | |
| | Hardware Installation | | | | | |
| | Operating System Software | | | | | |
| | Database Licenses | | | | | |
| | System Monitoring Software | | | | | |
| | Test Database | | | | | |
| ILS Primary Applications | | | | | | |
| | Staff Client Software for use by up to 50 concurrent users | | | | | |
| | Circulation | | | | | |
| | Cataloging (w/Authority Control) | | | | | |
| | OPAC | | | | | |
| | Reporting Module | | | | | |
| | Other Applications | | | | | |
| Applications Software and Utilities | | | | | | |
| | Integration cost for Third Party Products (APIs if applicable) | | | | | |
| | Offline Circulation | | | | | |
| | Mobile Circulation | | | | | |
| | Enhanced Record Content | | | | | |
| | Inventory | | | | | |
| | Email Notification Service | | | | | |
| | Phone Notification Service | | | | | |
| | Text Notification Service | | | | | |
| | eResource Integration (ebooks) | | | | | |
| | Browser based staff client software for use by up to 50 concurrent users | | | | | |
| | SIP2 | | | | | |
| | Z39.50 Client | | | | | |
| | Optional Functionality/Modules | | | | | |
| Data Extraction / Migration Services | | | | | | |
| | Bibliographic | | | | | |

Perth County Information Network
Request for Proposals for an Integrated Library System

| | Description | Initial Cost + Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|--|--|-----------------------|--------|--------|--------|--------|
| | Item | | | | | |
| | Authority | | | | | |
| | Patron | | | | | |
| | Circulation Transactions | | | | | |
| | Fines and Block Records | | | | | |
| | Hold Records | | | | | |
| | | | | | | |
| | Professional Services | | | | | |
| | Project Management | | | | | |
| | Installation, configuration, staging and implementation of ILS | | | | | |
| | On-site Administrative Training on all ILS functions | | | | | |
| | On-site Key Staff Training on ILS functions | | | | | |
| | System Administration and User Documentation | | | | | |
| | Integration of third party products | | | | | |
| | Technical Support (trouble-tickets, calls & email) | | | | | |
| | Upgrades | | | | | |
| | | | | | | |
| | Other | | | | | |
| | Include any other optional items described in your Proposal | | | | | |
| | | | | | | |
| | | | | | | |
| | Total Cost Per Year | | | | | |

Cost Proposal – Cloud Computing (SaaS) Solution

| | Description | Initial Cost + Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|---|--|-----------------------|--------|--------|--------|--------|
| Cloud Computing (SaaS) Solution | | | | | | |
| | Hosting Fee | | | | | |
| | Test Database | | | | | |
| | | | | | | |
| ILS Primary Applications | | | | | | |
| | Staff Client Software for use by up to 50 concurrent users | | | | | |
| | Circulation | | | | | |
| | Cataloging (w/Authority Control) | | | | | |
| | OPAC | | | | | |
| | Reporting Module | | | | | |
| | Other Applications | | | | | |
| | | | | | | |
| Applications Software and Utilities | | | | | | |
| | Integration cost for Third Party Products (APIs if applicable) | | | | | |
| | Offline Circulation | | | | | |
| | Mobile Circulation | | | | | |
| | Enhanced Record Content | | | | | |
| | Inventory | | | | | |
| | Email Notification Service | | | | | |
| | Phone Notification Service | | | | | |
| | Text Notification Service | | | | | |
| | eResource Integration (ebooks) | | | | | |
| | Browser based staff client software for use by up to 50 concurrent users | | | | | |
| | SIP2 | | | | | |
| | Z39.50 Client | | | | | |
| | Optional Functionality/Modules | | | | | |
| | | | | | | |
| Data Extraction / Migration Services | | | | | | |
| | Bibliographic | | | | | |
| | Item | | | | | |
| | Authority | | | | | |
| | Patron | | | | | |
| | Circulation Transactions | | | | | |
| | Fines and Block Records | | | | | |
| | Hold Records | | | | | |

Perth County Information Network
Request for Proposals for an Integrated Library System

| | Description | Initial Cost + Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|------------------------------|--|-----------------------|--------|--------|--------|--------|
| Professional Services | | | | | | |
| | Project Management | | | | | |
| | Installation, configuration, staging and implementation of ILS | | | | | |
| | On-site Training on all ILS functions | | | | | |
| | System Administration and User Documentation | | | | | |
| | Integration of third party products | | | | | |
| | Technical Support (trouble-tickets, calls & email) | | | | | |
| | Upgrades | | | | | |
| Other | | | | | | |
| | Include any other optional items described in your Proposal | | | | | |
| | | | | | | |
| Total Cost Per Year | | | | | | |