



# **REQUEST FOR PROPOSAL**

**December 8<sup>th</sup>, 2023**

For

**INTEGRATED LIBRARY SYSTEM FOR  
SCHAUMBURG TOWNSHIP DISTRICT LIBRARY  
RFP #2023-ILS-CP01**

## TABLE OF CONTENTS

- 1.0 Notice of Request for Proposals (RFP)
- 2.0 Instructions to Bidders
- 3.0 Scope of Services
- 4.0 Proposal Evaluation and Award
- 5.0 Submittal Instructions

### SECTION 1.0 – NOTICE OF REQUEST FOR PROPOSAL (RFP)

#### 1.1 Notice of Request for Proposal

Notice is hereby given that proposals will be accepted via email, mail, or in person listed below before 3:00 p.m. CDT on Friday, January 12, 2024, for an Integrated Library System for the Schaumburg Township District Library (“STDL”).

#### 1.2 RFP Timeline

<b>Name of the Proposal</b>	Integrated Library System (ILS) for Schaumburg Township District Library RFP#2023-ILS-CP01
<b>Date of Issuance</b>	12/08/2023
<b>Deadline for Questions</b>	12/22/2023
<b>Deadline for Proposal Submittal</b>	01/12/2024
<b>Recommendation for Award</b>	End of February 2024
<b>Method of Submittal</b>	Physical or Digital
<b>Contact Person, Title</b>	Aaron Bock, Director of Access Services
<b>Street Address</b>	130 South Roselle Road
<b>Address 2</b>	RFP Response 2023-ILS-CP01
<b>STDL, State, ZIP</b>	Schaumburg, IL 60193
<b>E-mail Address</b>	<a href="mailto:Bids@stdl.org">Bids@stdl.org</a>

1.3 The entire proposal can be delivered via pdf to [bids@stdl.org](mailto:bids@stdl.org) with the name of the proposal and the RFP number 2023-ILS-CP01 in the subject line or in a sealed package clearly marked with the name of the proposal and the RFP number 2023-ILS-CP01. and may be delivered by email, hand, U.S. mail, or by courier service. Proposals are due at the time and date shown in the Schedule of Events and proposals beyond the deadline may be returned, unopened.

1.4 Proposals will be evaluated promptly after opening. After an award is made, a proposal summary will be sent to all companies who submitted a proposal. Proposal results will not be given over

the telephone or prior to award. Proposals may be withdrawn any time prior to the scheduled closing time for receipt of proposals; no proposal may be modified or withdrawn for a period of ninety (90) calendar days thereafter.

## **SECTION 2.0 – INSTRUCTIONS TO BIDDERS**

### **2.1 NOTICE: INSURANCE IS REQUIRED FOR THIS PROJECT**

#### **SERVICES SHALL NOT BEGIN UNTIL THE CERTIFICATE OF INSURANCE AND ALL ENDORSEMENTS ARE RECEIVED AND APPROVED BY STDL.**

The successful Bidder shall purchase, at its own expense, and maintain for the duration of the Services specified in the Contract, and any extensions thereof, insurance against claims for injuries to persons or damages to property, which may arise out from or in connection with the Bidder's operations under the Contract.

Insurance is to be placed with insurers of good standing that are licensed to do business in Illinois.

The Bidder shall furnish the Schaumburg Township District Library with certificates of insurance and with original endorsements if applicable effecting coverage required by the Contract. The certificates and endorsements for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf.

All certificates and endorsements are to be received and approved by the Schaumburg Township District Library before any Services are performed under the Contract. The Schaumburg Township District Library reserves the right to require complete certified copies of all required policies, at any time.

Each insurance policy required by the Contract shall not be suspended, voided, canceled, reduced in coverage or in limits except after thirty (30) days prior written notice by certified mail, return receipt required, has been given to the Schaumburg Township District Library.

Bidder shall, to the fullest extent permitted by law, waive any and all rights of contribution against the Schaumburg Township District Library and shall indemnify the Schaumburg Township District Library and its officers, elected and appointed officials, employees, volunteers and agents from and against all claims, damages, losses and expenses, including, but not limited to, legal fees (reasonable attorney's and paralegal's fees, expert fees and court costs) arising out of or resulting from the performance of the Bidder's work, provided that any such claim, damage, loss or expense is attributable to bodily injury, sickness, disease or death, or injury to or destruction of property, other than the work itself, including the loss of use resulting therefrom, or is attributable to misuse or improper use of trademark or copyright protected material or otherwise protected intellectual property, to the extent it is caused by any wrongful or negligent act or omission of the Bidder, any Subcontractor, anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable. Such obligation shall not be construed to negate, abridge or otherwise reduce any other right to indemnity that the Schaumburg Township District Library would otherwise have. The Bidder shall similarly, protect, and indemnify the Schaumburg Township District Library, its officers, elected and appointed officials, employees, volunteers and agents against and from any and

all claims, costs, causes, actions and expenses, including, but not limited to, legal fees, incurred by reason of Bidder's breach of any of its obligations under, or Bidder's default of any provisions of the Contract. The indemnification obligations under this paragraph shall not be limited in any way by any limitation on the amount or type of damages, compensation, or benefits payable by or for the Bidder or any subcontractor under Workers' Compensation or Disability Benefit Acts or Employee Benefit Acts. Bidder's indemnification obligations specified herein shall survive the voluntary or involuntary termination of the Contract.

## 2.2 Pre-Proposal Call

A pre-proposal call will be held on **12/18/2023 at 1:00 pm** CDT.

Email Aaron Bock at [abock@stdl.org](mailto:abock@stdl.org) to request meeting ID and password to join the online event.

2.3 This Request for Proposal does not commit STDL to make an award, nor will STDL pay any costs incurred by the Bidder in the preparation and submission of proposals, or any costs incurred by the Bidder, any subcontractor, their employees or agents, in making necessary studies for the preparation of proposals.

## 2.4 Addenda

If the Bidder requires an explanation or clarification concerning any matter specified in this proposal package, then the Bidder must submit their questions, in writing, by Friday, December 22, 2023, at 3:00 p.m. CDT to [bids@stdl.org](mailto:bids@stdl.org). All questions will be answered to the best of our ability in the form of a written addenda to all Bidders. All addenda that you receive shall become a part of the Contract Documents. All Addenda will be posted on STDL website. It is the Bidder's responsibility to check for addenda.

## 2.5 Exceptions to Documents

The Bidder shall clearly state in the submitted proposal any exceptions to, or deviations from, the minimum proposal requirements, and any exceptions to the terms and conditions of this RFP. Such exceptions or deviations will be considered in evaluating the proposals. Bidders are cautioned that proposed exceptions or deviations from this RFP may cause their proposal to be rejected by STDL.

## 2.6 Silence of Specifications

Commercially accepted practices shall apply to any detail not covered in the specification and to any omission of the specification. Any omission or question of interpretation of the specification that affects the performance or integrity of the Services being offered shall be addressed in writing and submitted with the Proposal.

## 2.7 Incomplete Information

Failure to complete or provide any of the information requested in this Request for Proposal, including references, and/or additional information as indicated, may result in disqualification by reason of "non-responsiveness".

## **SECTION 3.0 – SCOPE OF SERVICES**

### 3.1 Background

Schaumburg Township District Library (STDL) is seeking Proposals from qualified Bidders with the intent to establish a contract with one vendor to provide an integrated library system, including related installation and migration services, to STDL.

### 3.2 About STDL

STDL is located in the Village of Schaumburg in northern Cook County and serves 130,000 residents in Elk Grove Village, Hanover Park, Hoffman Estates, Roselle, the Village of Schaumburg, and Streamwood. The STDL'S facilities consist of the Central Library in Schaumburg and branches in Hanover Park and Hoffman Estates. We have over 1 million visitors come through the doors of our three branches every year.

STDL's Central Library and its branches work to make access and services as easy as possible for all STDL users. Van service makes transfer of materials from one branch to another fast and efficient, allowing library users to request a book from any branch to be delivered to the library location that is most convenient for them.

STDL provides online research databases and 24/7 access to a digital library of downloadable audiobooks, eBooks, music, and movies available to all district patrons with a current library card. STDL abides by all policies required and offers reciprocal borrowing cards to all eligible patrons.

STDL currently uses the SirsiDynix Symphony integrated library system. STDL houses a collection of over 440,000 items, and an e-media collection of over 200,000 items.

### 3.3 Scope of Services

STDL requires a modern Library Management System or Integrated Library System to support inventory tracking, materials acquisitions, content discovery, customer relationship management, email, and text messaging communications, and more. Installation and migration services shall include hosting, hardware and software configuration, data conversion, data migration, and training. Clearly define what features and services are included in the price for the system or if there would be an additional cost to STDL.

### 3.4 Product Information to be Included in Proposal Submittals

#### 3.4.1 Features

Proposal submittals shall list all key features included in the proposed Integrated Library System product and the features included in any additional modules, add-ons, or third-party products that the company would recommend for STDL. At a minimum, proposal submittals shall address the following areas:

- a. Customer Experience (including discovery layer)
  - a. Is Discovery natively based on BIBFRAME? Please elaborate.
  - b. Does Discovery provide a single search result and single on-screen request button for each title? Please elaborate.

- c. Does Discovery allow the library to promote library collections? Please elaborate.
      - d. Is a mobile app provided? Please elaborate.
      - e. Does Discovery offer enriched content as part of the Discovery solution or is this an extra cost? Please elaborate.
      - f. Does Discovery offer patron self-service options and patron engagement features? Please elaborate.
      - g. Is there a kid's version of Discovery? Please elaborate.
    - b. Staff Experience (circulation and customer management)
      - a. Is the full suite of staff activities relating to patron services & circulation functions web-based? Please elaborate.
      - b. Is it possible to switch from one work form to another without closing a work form or opening a new tab? Please elaborate.
      - c. Are suggestions provided as search terms are entered? Please elaborate.
      - d. Is it possible to manage hold requests on a tablet? Please elaborate.
      - e. Are patron notices included and can they be customized? Please elaborate.
      - f. Is a separate subsystem for Outreach Services available? Can outreach services be managed on a tablet? Please elaborate.
    - c. Cataloging and Collection Management
      - a. Are cataloging functions web-based? Please elaborate.
      - b. Is it possible to create, copy, modify and bulk change item records? Please elaborate.
      - c. Is it possible to bulk change bibliographic records? Please elaborate.
      - d. Is it possible to search remote databases and copy the cataloging details? Please elaborate.
      - e. During check-in, is it possible for permitted staff to edit item records? Please elaborate.
    - d. Acquisitions
      - a. Is automating workflows supported? Please elaborate.
      - b. Is EDI (Edifact) ordering supported? Please elaborate.
      - c. Can the library receive a shipment in multiple ways? Please elaborate.
      - d. Does the system support multiple and overlapping fiscal years? Please elaborate.
      - e. Does the system support manual acquisitions workflows for non-library vendor orders? Please elaborate.
    - e. Serial Control
      - a. Are serials check in web-based? Please elaborate.
      - b. Is it possible to undo a check-in? Please elaborate:
      - c. Is it possible to predict the next group of issues or parts? Please elaborate.
      - d. Is it possible to combine serials issues? Please elaborate.
      - e. Can missing issues be claimed? Please elaborate.
    - f. Reporting capabilities
      - a. Is an ad hoc reporting capability supported? Please elaborate.
      - b. Is it possible to bookmark frequently used reports? Please elaborate.
      - c. Is the reporting tool web-based? Please elaborate.
      - d. Is it possible to schedule reports to run at a date and time specified and to manage the schedule? Please elaborate.

- e. Is it possible to output reports in a variety of formats? Please elaborate.
- f. Are there technical languages required for running reports? Please elaborate.
- g. Marketing
  - a. Does your marketing solution provide the ability to import and manage contacts? Please elaborate.
  - b. Does your marketing solution provide templates and images? Please elaborate.
  - c. Does your marketing solution handle bounce-back emails? Please elaborate.
  - d. Does your marketing solution provide unsubscribe options? Please elaborate.
  - e. Does your marketing solution provide engagement metrics? Please elaborate.
  - f. Does your marketing solution integrate with ILS patron data? Please elaborate.
- h. Event Management
  - a. Does your event management tool provide for event creation and management? Please elaborate.
  - b. Does your event management tool provide a customizable event display? Please elaborate.
  - c. Does your event management tool provide options to communicate with attendees? Please elaborate.
  - d. Does your event management tool provide event ratings? Please elaborate.
  - e. Does your event management tool provide event marketing tools? Please elaborate.
  - f. Does your event management tool provide room booking functionality? Please elaborate.
- i. Systems Administration and Integrations
  - a. Is an administrative interface provided to allow authorized staff to configure and edit parameters? Please elaborate.
  - b. Does your system integrate with other third-party products? Please elaborate.

#### 3.4.2 Future Development

The Proposal must include detailed information describing the Bidder's current development plans, including new features or products planned for release over the next two years as part of its integrated library system. Proposals shall also include a product "road map."

#### 3.4.3 System Requirements

If the Bidder's product is cloud-based or otherwise hosted by the Bidder, the Proposal must include detailed information describing the minimum and recommended requirements for hardware clients and internet connectivity.

#### 3.4.4 Data Backup & Security

STDL requires that updated security protocols be used to protect customer data in accordance with federal, state, and local requirements. STDL requires library transaction data be backed up hourly at a minimum. Proposal submittals shall include a description of the Bidder's ability to meet these requirements.

#### 3.4.5 Technical Support

STDL prefers that vendor support be available 24/7 with remote access, phone, and email support. It is also preferred that Bidder's use a support ticketing tool to track support requests.

### 3.5 Pricing

### 3.5.1 Pricing Breakdown

STDL is requesting a pricing breakdown for the proposed Integrated Library System and any additional modules (see 4.4 above) in the Proposal. For each price, the Bidder must indicate if the price is a one-time fee or an annual cost. Please describe the levels of service that apply and how they affect overall pricing. Describe any package discounts, discounts based on contract length, or any other price reductions.

### 3.5.2 Proposal

Proposals shall indicate if initial installation and migration services are included in the purchase of the system or if there are additional costs.

## **SECTION 4.0 – PROPOSAL EVALUATION AND AWARD**

### 4.1 Award

4.1.1 Any award(s) made by STDL is subject to prior approval by Schaumburg Township District Library Board of Trustees.

4.1.2 An award shall be made to the responsible Bidder submitting the most responsive proposal which offers the greatest value to STDL regarding the detailed criteria and the specifications set forth herein. STDL reserves the right to accept or reject any or all proposals; to resolicit the project; to use both primary and secondary Bidders; to award proposals by groups; and to waive technicalities and formalities where it is deemed advisable in protection of the best interests of STDL.

4.1.3 If STDL determines that all the proposals received shall be rejected, the Bidders will be notified accordingly. At that point, STDL may, or may not, re-solicit the project.

### 4.2 Proposal Evaluation Criteria

Financial terms will not be the sole determining factor in the award. In general, the proposals will be evaluated based on, but not limited to, the general evaluation criteria stated below and the completeness, clarity, and content of the proposal.

#### 4.2.1 System Features and Functionality – 45% of total evaluation score

- a. Ease of use
- b. Features currently available
- c. Future development plans
- d. Hosting services
- e. Customer engagement tools
- f. Integration with third party products and vendors
- g. Flexibility of the software regarding customization and APIs

#### 4.2.2 Qualifications and Experience – 30% of total evaluation score

- a. Relevant experience of key personnel, including assigned Project Manager to assess background, capacity, and experience
- b. On-going training proposed
- c. Relevance of references, including performance on other city projects
- d. Knowledge, experience, and an established positive record of accomplishment of accomplishing projects of similar nature and complexity



- e. Technical support proposed
  - f. Fiscal responsibility/stability
- 4.2.3 Financial Proposal – 10% of total evaluation score
- 4.2.4 Company Responsiveness to RFP – 15% of total evaluation score
- a. Total scope of services proposed
  - b. Demonstrated understanding of the project
  - c. Proposed timeline and approach to project
  - d. Responses to overall proposal and compliance with submission guidelines
  - e. Proposal presentation (completeness, organization, appearance, etc.)

The Bidder must not have any unresolved performance issues with STDL. The Bidder's performance as a prime Bidder or Subconsultant in previous STDL contracts shall be considered when evaluating the Bidder's submittal for this Request for Proposal.

STDL may check the references provided and survey other local agencies during the proposal evaluation period to ensure the Bidder does not have any unresolved or unsatisfactory performance issues. STDL reserves the right to reject the Bidder's submittal based on its assessment of the Bidder's prior performance.

#### 4.3 Proposal Evaluation Procedures

4.3.1 Proposals will be evaluated by an STDL proposal evaluation team (hereinafter "Team") using the following procedures. Each evaluator will rank each proposal on a scale of 1 to 10 for each of the criteria stated in Section 4.2. Evaluator scores will be averaged, and the weighting percentage will be applied.

4.3.2. Team members will read each proposal and will evaluate based on their experience and judgment of how well the proposal addresses STDL's requirements. Each prospective company is assured that any proposal submitted will be evaluated using the best available information and without any forgone conclusions. STDL may also research and use any and all publicly available information about the Bidder

4.3.3 Team members will convene to discuss the proposals. At this point, some firms may be eliminated from further consideration based on their overall response to the RFP.

4.3.4 Consideration will also be given to written clarification provided during the evaluation process and input from staff or other persons judged to have useful expertise that should be considered in a responsible, fair assessment of the relative merits of a proposal. References, as deemed appropriate, may be checked at any time during the process.

4.3.5 The Team may arrange interviews, demonstrations and/or presentations with representatives of the top firms.

4.3.6 The Team meets again for further discussion and then scores the top proposals based on the criteria stated in section 4.2.

4.3.7 In the Team's sole discretion, the top Bidder(s) may be invited to submit a "best and final offer" to negotiate cost or deliverables.

4.3.8 STDL would then enter into contract negotiations with the top Bidder.

4.3.9 A Bidder's submission of a proposal constitutes its acceptance of this evaluation technique and its recognition and acceptance that subjective judgments will be used by the Team in its evaluations.

## **SECTION 5.0 - SUBMITTAL INSTRUCTIONS**

### 5.1 Financial Proposal

This portion of the proposal shall include ONLY the proposed cost. The financial proposal shall be included in Tab Section 5.0 of the proposal response as shown in the table below.

### 5.2 Non-Financial Proposal

5.2.1 To analyze responses to this RFP, Bidders must prepare their proposals in accordance with the instructions outlined in this section. Bidders whose proposals deviate from these instructions may be considered non-responsive and may be disqualified at the discretion of STDL.

5.2.2 Proposals should be prepared as simply as possible and provide a straightforward, concise description of the Bidder's capabilities to satisfy the requirements of the RFP. Emphasis shall be concentrated on accuracy, completeness, and clarity of content.

<b>Proposal Section</b>	<b>Title</b>
1.0	Cover Letter and Executive Summary
2.0	Company Background and Experience
3.0	Response to Scope of Services
4.0	System Features and Functionality
5.0	Financial Proposal
6.0	References

5.2.3 The Bidder shall provide a Cover Letter on corporate letterhead, signed by an authorized representative of the company and an Executive Summary which will be limited to a brief narrative highlighting the Bidder's proposal. The Executive Summary should not include cost quotations.

5.2.4 Bidders shall provide information about their company and the individuals assigned to provide the Services so STDL, as well as information about the Bidder's stability and ability to support the commitments set forth in the RFP and the Contract. STDL, in its discretion, may require a Bidder to provide additional documentation and/or clarify requested information.

a. Brief description of the company including company size and organization, history, present status, future plans, URL for company website, etc.

b. Provide the name of the principal or project manager in your firm, including his/her office location, who will have direct and continued responsibility for the services provided to STDL. This person will serve as the firm's first point-of-contact on all matters dealing with services and the handling of day-to-day activities throughout the duration of the project.

- c. Identify other individuals assigned to this project by name, job classification and office location.
  - d. Describe the professional experience of everyone proposed to be assigned to this project, including the project manager, and provide a detailed listing of the projects they have worked on for other clients.
- 5.2.5 Bidders shall provide their response to the Scope of Services, including an outline for project management and task implementation. The work plan must detail the firm's services to be performed and a schedule that the firm proposes for completing the project. Please note that timely completion of this project is critical.
- 5.2.6 Bidders shall list all key features and functions of the Integrated Library System and any additional modules, add-ons, or third-party products they recommend in response to this RFP.
- 5.2.7 Bidder shall provide their financial proposal.
- 5.2.8 Bidders shall submit a list of at least three references for whom they have done work like that described in the scope of this RFP. The services provided to these clients must have characteristics as similar as possible to those requested in this RFP. Information provided for each client must include the following: Client Name, explanation of contract, size of library, contact person, title, address, phone number, email address, and list of products used at client site.
- 5.2.9 Failure to provide the above information may result in the Bidder being disqualified and its proposal not considered. STDL reserves the right to contact any and all references to obtain, without limitation, information regardless of the Bidder's performance on the listed jobs.
- 5.4 All offers and other work products submitted in response to this RFP shall become the property of STDL. Documents and information furnished by the Bidder to STDL pursuant to this Proposal and the Contract are public records that may be subject to disclosure by STDL in response to a request for public records submitted to STDL pursuant to the Illinois Freedom of Information Act ("FOIA"), 5 ILCS 140/1 et seq. If the Bidder provides any trade secrets, commercial information, or financial information to STDL under a claim that this information is proprietary, privileged, or confidential, and that disclosure of this information would cause the Bidder competitive harm, the Bidder must furnish this information to STDL under an express claim of confidentiality.