



CHECK OUT STATION BID SPECIFICATION

Timberland Regional Library, August 2024

ABSTRACT

Check Out Stations for Patron Self-Service and Related Installation, Training, and Support Services

DUE: Sep. 13th, 2024

Andrea Heisel, Ryan Williams

CONTENTS

1 Purpose and Background _____ **2**

 About TRL _____ 2

 Procurement Schedule _____ 3

 Electronic Submittal ONLY _____ 3

2 Scope of Services _____ **4**

3 General Proposal Requirements _____ **4**

 3.1 Company Information & Executive Summary _____ 6

 3.2 Description of the Proposed Solution _____ 7

 3.3 General and Technical Requirements _____ 7

 3.4 Project Plan _____ 8

 3.5 Training _____ 8

 3.6 Maintenance and Support _____ 8

 3.7 References _____ 9

 3.8 Pricing _____ 9

 3.9 Vendor Solution Requirements _____ 9

 3.10 Anything not previously covered _____ 14

4 Evaluation of Proposals _____ **15**

5 Terms and Conditions _____ **19**

General questions should be directed to Andrea Heisel, Director of Content and Access at:

Timberland Regional Library
415 Tumwater BLVD SW
Tumwater, WA 98501
Tel.: 360.704.4526
Email: aheisel@trl.org

However, no oral interpretations shall be made to any respondent as to the meaning of any of the bid documents. Every request for an interpretation shall be made in writing and mailed or e-mailed to the address listed above. Such questions must be received by the date listed in the schedule.

1 Purpose and Background

Timberland Regional Library (TRL) is requesting proposals from Vendors for the purpose of obtaining information and firm bids for Vendors Check Out Stations for patron self-service and related installation, training, and support services.

About TRL

TRL is a rural library district in southwest Washington that covers Grays Harbor, Lewis, Mason, Pacific, and Thurston counties with 29 libraries, an Administrative Service Center, five mobile service vehicles, and a couple kiosk locations. The library holds a collection of approximately 580,000 items and has an annual circulation of nearly 2 million. TRL serves a population of 560,775 residents.

Procurement Schedule

Release Request for Proposal AUG. 9, 2024, 4 pm

Deadline for Vendor Questions AUG. 23, 2024, 4 pm

**Answers to RFP questions posted
on TRL website** AUG. 30, 2024, 4 pm

Vendor Proposal Response Due SEP. 13, 2024, 4 pm

**Finalists notified / vendor short list
released** SEP. 27, 2024, 4 pm

**Vendor reference checks
complete** OCT. 11, 2024, 4 pm

Final selection OCT. 25, 2024, 4 pm

Implementation Begins Jan. 2, 2025

TRL must receive responses to this RFP no later than 4pm on Sep. 13, 2024. Proposals received after the due date will not be accepted. No additional time will be granted to any vendor unless by addendum to this RFP.

Electronic Submittal ONLY

TRL allows and will accept an electronic submittal in lieu of an official paper submittal.

- 1) The electronic submittal is e-mailed to the Procurement Contact (see page 2), by the submittal deadline (Procurement Schedule, Page 3).
- 2) Title the e-mail so it will not be lost in an e-mail stream.
- 3) Any risks associated with an electronic submittal are borne by the Proposer.
- 4) If you are sending a large file, please reach out to us for best method of submittal.
- 5) If the Proposer also submits a hard copy, the hard copy has precedence.

2 Scope of Services

TRL is seeking a total of 58 check out stations with RFID support for scanning (not security, the security bit won't be used).

Related services may include but are not limited to design, manufacture, shipment, installation, configuration, remote training, on-site training, project management, and ongoing maintenance and support.

TRL currently uses the SirsiDynix Symphony integrated library system. The library collection is tagged with RFID tags, though some materials are not tagged, so the system also needs to scan barcodes. Library cards are also barcodes, not RFID.

With this proposal, TRL seeks to improve user experience, services and reduce the impact of materials handling on employees.

3 General Proposal Requirements

Vendors interested in providing the services described above are requested to submit the following information. Responses to each item should appear in the

same order as in this RFP and should designate by heading and paragraph the item to which the response applies.

Vendors that deviate from this format may be deemed unresponsive. Proposals should be prepared simply, providing a straightforward, concise delineation of the capabilities necessary to satisfy the requirements of the RFP. Elaborate promotional materials should not be submitted at this time. Emphasis in the proposals should be on completeness, clarity of content and adherence to the presentation structure required by this RFP and not on volume. Costs for developing proposals in response to the RFP are the obligation of the vendor and are not chargeable to TRL. All proposals and accompanying documentation will become the property of TRL and will not be returned.

- If the Vendor’s specifications for furnishing products or equipment are in any respect not equivalent of the requirements in the RFP, this discrepancy must specifically be called out in the proposal.
- Pricing should include broken out detail on all costs related to equipment, software, hardware, installation, training, final implementation, and annual support costs.
- Vendors selected by TRL shall provide a demonstration of equipment proposed during the post-RFP evaluation process at no cost to the library.

TRL will select the successful proposal based upon several evaluation factors: including features as outlined in the RFP; effective integration to Symphony; company stability; training and implementation plan; technical support; and price. The selection of finalists and the final award will be decided based on the proposal submitted by a qualified vendor that best meets the needs of TRL as determined by TRL. TRL reserves the right to reject any or all proposals.

Pre-Submittal Questions- There will be no pre-bidders conference. Questions regarding the RFP may be submitted to the TRL by Aug. 23, 2024 (or via email)

at aheisel@trl.org. The list of submitted questions with their respective answers will be posted to TRL's website by Aug. 30, 2024.

RFP Amendments- TRL reserves the right to request clarification on any proposal or to ask respondents to supply any additional material deemed necessary to assist in the evaluation of the proposal. TRL reserves the right to change the RFP schedule or issue amendments to the RFP at any time. TRL also reserves the right to cancel or reissue the RFP.

Rejection of Proposals- TRL reserves the right to reject any or all proposals, to waive any minor informalities or irregularities contained in any proposal, and to accept any proposal deemed to be in the best interest of TRL.

Proposal Validity Period- Submission of a proposal will signify the vendor's agreement that its proposal and the content thereof are valid for 180 days following the submission deadline and will become part of the contract that is negotiated between TRL and the successful vendor.

Disclaimer- TRL reserves the right to share, with any consultant of its choosing, the RFP and any resultant proposals in order to secure expert opinion.

Non-Obligation- Receipt of proposals in response to this RFP does not obligate the TRL in any way. The right to accept or reject any proposal shall be exercised solely by the TRL. The TRL shall retain the right to abandon the proposal process at any time prior to the actual execution of a contract with a vendor, and the TRL shall bear no financial or other responsibility in the event of such abandonment.

Public Disclosure- All materials provided to the TRL by vendors are subject to State and TRL's public disclosure laws.

3.1 Company Information & Executive Summary

Please provide the following information:

- Vendor's full company or corporate name.
- The company's office location responsible for performance under a contract with Timberland Regional Library.
- The URL for the Vendor's website.

The proposal must contain an executive summary not exceeding two pages which summarizes key points of the proposal, and which is signed by an officer of the firm who is responsible for committing the firm's resources.

3.2 Description of the Proposed Solution

Please provide a complete description of the proposed system and illustrate the products and systems comparing the Vendor's proposed check out solution to the requirements. Include a timeline with key milestones for product delivery, installation, and staff training.

3.3 General and Technical Requirements

Please indicate whether the proposed solution includes the following features/functionality:

1. Interoperability with SirsiDynix Symphony via SIP2, encrypted SIP2, web services, or API connection.
2. Operating system and other applications included in the Vendor's solution are kept up-to-date at no cost to TRL.
3. Supports secure remote log in for support and administration.
4. The proposed system must not interfere with other equipment, automated library system clients, or PCs that may be nearby.
5. All system components must be ETL or UL, and FCC Part 15-Certificed; SIP2, TCP/IP Ethernet 10/100, and 802.11n (wireless) compliant.

6. Vendor must be willing to work with the integrated library system vendor to resolve any ILS functionality problem.
 - a. List all custom development between vendor and ILS company.
 - b. Identify how any custom development applies to the proposed system.
7. Vendor must provide FCC and UL information for all relevant equipment proposed.
8. Vendor must provide current ACR and/or VPAT clearly identifying the level of conformance with Section 508.

3.4 Project Plan

Detail the Vendor's anticipated project plan, including design, manufacture, delivery, installation, testing, and training.

3.5 Training

Describe library staff training offered by Vendor. Include whether training is virtual or on-site. If on-site, include details on compliance with relevant CDC and State guidelines to reduce the transmission of COVID-19.

3.6 Maintenance and Support

TRL prefers that Vendor support be available during most library open hours with a response time of four hours or less for critical hardware and software issues. The library also prefers to contact Vendors via telephone or a web-based ticketing system for support requests.

Describe ongoing maintenance and support offered by the Vendor. Include availability of telephone or web-based support and support response times.

Detail any preventive maintenance plans for the proposed solution that the Vendor recommends.

3.7 References

Provide names and contact information for at least two references.

3.8 Pricing

Provide detailed pricing for design, manufacture, and installation of the proposed solution, including shipping charges, training fees, and any other non-recurring costs. Provide pricing for conveyance as an additional option.

Provide detailed pricing for ongoing maintenance, support, licensing, and any other monthly or yearly recurring costs.

3.9 Vendor Solution Requirements

This section includes the vendor, technical, and functional requirements to be evaluated in this RFP. This is not a comprehensive list of all TRL's requirements but includes the key requirements that will be used to evaluate the RFPs and will be included as part of the signed contracts. Responses to each line item should be concise and straightforward.

TRL expects vendors to respond in a factual manner. Vendors must provide an answer for every item. If a submitted RFP includes blank responses the document may be considered in violation and rejected. Use the following rating system to complete the RFP and evaluate the requirements and include a brief description of how the software supports the stated requirement.

Yes/No		Description	Notes
1.	<input type="checkbox"/> Yes <input type="checkbox"/> No	All system components are ETL or UL, and FCC Part 15-Certified; SIP2, RS-232, TCP/IP Ethernet 10/100, 802.11n (wireless) compliant where appropriate	
2.	<input type="checkbox"/> Yes <input type="checkbox"/> No	The proposed system and all its components are entirely compatible with, and in no manner interfere with, the integrated library system, its computer clients, or other components.	
3.	<input type="checkbox"/> Yes <input type="checkbox"/> No	The proposed system provides application-specific software to incorporate all hardware (detection systems, intake readers) and the circulation RFID tags and barcodes.	
4.	<input type="checkbox"/> Yes <input type="checkbox"/> No	The proposed solution interfaces with the library's existing automated library system using SIP, SIP2, NCIP, web services, or API protocol.	

Yes/No		Description	Notes
5.	<input type="checkbox"/> Yes <input type="checkbox"/> No	The proposed solution connects through the library's Ethernet network via an RJ-45 connector and / or secured wireless network.	
6.	<input type="checkbox"/> Yes <input type="checkbox"/> No	Vendor will work with the integrated library system vendor to resolve any integration problems.	
7.	<input type="checkbox"/> Yes <input type="checkbox"/> No	The proposed solution can read item-specific identification numbers (RFID and barcodes), communicate to the host circulation system.	
8.	<input type="checkbox"/> Yes <input type="checkbox"/> No	System provides reporting and analytical tools to understand its use and provide insights regarding settings, accessible via a web portal.	
9.	<input type="checkbox"/> Yes <input type="checkbox"/> No	The software allows for remote diagnosis and automatically send alert notifications via email or SMS to staff.	

Yes/No	Description	Notes
10. <input type="checkbox"/> Yes <input type="checkbox"/> No	Capable of printing due date receipts, if requested; or, emailed due date receipts; includes option for no receipt.	
11. <input type="checkbox"/> Yes <input type="checkbox"/> No	Must be compatible with various material formats. Able to process library materials without danger of damaging or erasing magnetic media.	
12. <input type="checkbox"/> Yes <input type="checkbox"/> No	Enable returned items to be identified in the ILS as returned and update the patron account in real time.	
13. <input type="checkbox"/> Yes <input type="checkbox"/> No	Able to operate concurrently with barcode and RFID tagged items in a mixed load. Describe how patrons are notified regarding non-RFID items.	
14. <input type="checkbox"/> Yes <input type="checkbox"/> No	Patron stations provide instructions in various languages selectable by the customer. Provide a list of languages available.	

Yes/No	Description	Notes
15. <input type="checkbox"/> Yes <input type="checkbox"/> No	Solution provides patron account features; lists of items out, renew items, holds (available and otherwise), account information.	
16. <input type="checkbox"/> Yes <input type="checkbox"/> No	Supports offline operation to capture and store information when the ILS is down and relay after service is restored.	
17. <input type="checkbox"/> Yes <input type="checkbox"/> No	Vendor support includes both remote and on-site support.	
18. <input type="checkbox"/> Yes <input type="checkbox"/> No	Vendor support portal includes case tracking, commenting, and case escalation features.	
19. <input type="checkbox"/> Yes <input type="checkbox"/> No	Proposed system supports remote configuration, updates; for individual or multiple units.	
20. <input type="checkbox"/> Yes <input type="checkbox"/> No	Solution integrates with and allows searching of public catalog.	

Yes/No	Description	Notes
21. <input type="checkbox"/> Yes <input type="checkbox"/> No	Proposed system includes option of a software-only license, able to run on a variety of hardware configurations.	

3.10 Anything not previously covered

Use this area to describe services and / or products not already mentioned in the Vendor's proposal that may be of interest to Timberland Regional Library.

4 Evaluation of Proposals

TRL's project team will evaluate the RFPs. The evaluators will consider how well the proposed solution meets TRL's requirements as described in the RFP. It is important that the responses be clear and complete to ensure that the evaluators can adequately understand all aspects of the proposal.

Evaluation Factors. Selection of finalists will be primarily evaluated according to the following criteria:

- Quality, clarity, and completeness of the proposal. Adherence to requirements for RFP preparation, vendor viability, and strength
- Ability to meet TRL's functional and technical requirements
- Equipment ease of use
- Compatibility and integration with existing hardware and software
- Vendor's experience on similar projects
- Company's financial stability
- Ongoing support
- Ability to provide local service and support
- Price
- Proven reliability of service
- Software demos
- Total cost of ownership

The evaluation factors identified above reflect a wide range of considerations. While cost is important, other factors are also significant. TRL may select other

than the lowest cost solution. The objective is to choose a vendor capable of providing a reliable and integrated solution within a reasonable budget. All proposals will be evaluated using the same criteria.

Criteria	Weight
1. Responsiveness of the written proposal to the purpose and scope of service	10%
2. Equipment Quality and Features: Ability of the vendor to meet the Vendor and System Requirements	30%
3. Vendor's Experience and Technical Support: Experience in successful implementation and maintenance, as well as dedicated resources and technical support during and after implementation.	25%
4. Cost: Amount of Proposed cost of system, installation, conversion, training, licensing, and annual software maintenance.	35%

Notification- Based on the evaluation of the RFP’s TRL will select a Short List of up to three vendors and invite them to participate in Equipment Demos. The selected vendors will be notified in writing or email by the date indicated in Section 1.

Pre-Demo Meetings- Once the Short List of vendors has been identified they will be invited to participate in a Pre-Demo Meeting with the Project Team. The purpose of this meeting will be to allow the vendor time to acquire additional information about the scope of the project and to review any questions about

the Demo Script presented to the vendors. Customer references may be requested prior to the software demonstrations.

Scripted Demos- The functional and technical product Demos will be presented to TRL by the top two to four Short Listed vendors according to a pre-defined script issued by TRL. All vendors must follow this script during their Demo process. The evaluation criteria for the Demo process will include adherence to the script as well as the ability to successfully demonstrate the product's ability to meet the functional and technical requirements. TRL reserves the right to request additional information, interviews, follow-up demonstrations, or any other type of clarification of proposal information it deems necessary to evaluate the final vendors.

Post-Demo Technical Evaluation- In addition to scripted functional demonstrations, TRL may request a more extensive technical Demo. This Demo will be scheduled on an as-needed basis for the Short-Listed applications.

Implementation Vendor Selection- Once TRL has completed the selection of the equipment they will determine if a separate implementation vendor selection project is necessary. TRL reserves the right not to select the implementation partner that responds to the RFP or demonstrates the equipment on behalf of the vendor.

Site Visits- TRL may choose to conduct site visit(s) to the vendor's headquarters and/or vendor's clients as part of the evaluation process. The site visits may be used to determine the successful vendor and will be conducted following scheduled equipment demonstrations of the Short-Listed vendors. Evaluation of the vendor client sites will be based on the following:

- Assessment of the vendor's service during system implementation.
- Assessment of the quality of vendor's ongoing support.
- Overall user satisfaction with the system.

Contract Award and Execution- TRL reserves the right to make an award without further discussion of the proposal submitted. TRL shall not be bound or in any way obligated until both parties have executed a vendor contract. TRL also reserves the right to delay contract award and/or not to make a contract award.

Turn-Key Project- TRL is seeking a turn-key implementation of the equipment contemplated by this RFP. The Vendor shall provide all labor, equipment, materials, supplies, transportation and services necessary for, or reasonably incidental to, the complete performance of any agreement resulting from this RFP. Vendor must include in its price all design, engineering, system and application database development (including in-depth user interviews for user feature configurations), integration, delivery, installation, testing, training and warranty costs associated with all elements of the proposed system.

5 Terms and Conditions

The following terms and conditions apply to this RFP and are not inclusive of all terms and conditions in the final contract.

Business License and Taxation- The successful vendor and all subcontractors must hold valid business and professional licenses and registrations that may be required by the State of Washington and TRL.

Insurance Requirement- The vendor awarded the contract will be subject to TRL's requirements for insurance reflecting the minimum amounts and conditions as defined by TRL.

Workers' Compensation- The vendor shall procure and maintain for the life of the Contract/Agreement Workers' Compensation Insurance covering all employees with limits meeting all applicable state and federal laws. This coverage shall include Employer's Liability with limits meeting all applicable state and federal laws. This coverage shall extend to any subcontractor that does not have their own Workers' Compensation and Employer's Liability Insurance.

Proposals – Public Information- TRL will attempt to protect legitimate trade secrets of the Vendor. Any proprietary information contained in the Vendor's proposal must be clearly designated and shall be labeled with the words "Proprietary Information". Marking the entire proposal or any one or more of the major sections as proprietary will neither be accepted nor honored.

The Vendor should be aware that TRL is required by law to make certain records available for public inspection with certain exceptions. The Vendor, by submission of materials marked proprietary, acknowledges, and agrees that TRL will have no obligation or liability to the Vendor in the event that TRL must disclose these materials.

Copyright and Confidentiality- Selected vendor shall maintain strict privacy of all TRL records, data' and files (regardless of media), including any copyrighted material received from TRL.

Prime Vendor- It is recognized that multiple Vendors may wish to combine their resources in responding to this Request for Proposal. A Proposal with such a combination is acceptable, provided that the complete Proposal contains all required information, and indicates which Vendor shall be responsible for each of the components that make up the complete system. In addition, one of the Vendors shall be designated as responsible for the complete definition, delivery, integration, implementation, and maintenance of the system, referred to as the prime vendor.

Bidders must warrant to TRL that software specifications, capabilities, and performance characteristics are as stated in the proposal and accompanying documentation. Submission of a Proposal will represent your agreement to these conditions.

Governing Law - All matters relating to or arising out of this Agreement and the transactions it contemplates, and the rights of the parties, will be governed by and construed in accordance with the laws of the State of Washington, without regard to choice of law rules.

Venue and Jurisdiction - Each party irrevocably submits to the exclusive jurisdiction of Thurston County Superior Court in Olympia, Washington or the United States District Court in Tacoma, Washington, over any suit, action or proceeding arising out of or relating to this Agreement and confirms that these courts will have personal jurisdiction over all parties to this Agreement. Each party irrevocably waives any right to assert, as a defense or otherwise, any claim that it is not subject to the jurisdiction or the venue of these courts. The parties agree these courts offer convenient forums and proper venues for any suit under this Agreement.

Payment-TRL will pay invoices submitted by the selected vendor as progress is made on the implementation project and agreed upon service stipulated in the final agreement. Prior to payment, invoices will be reviewed to determine if billing is reflective of actual agreed upon project progression and performance. Upon acceptance of the billing by TRL's Project Manager the payment will be processed and submitted to the vendor. Payment terms must adhere to the State of Washington codes and regulations.

Satisfaction of TRL Attorney- The acceptance and subsequent award of a submitted proposal shall be at the review and satisfaction of TRL's Attorney and TRL's Project Manager.

Warranties- All warranties must be clear, concise, and in writing. Warranties shall be specific as to what is and is not covered along with the exact term (in calendar days) of each covered item. Warranties shall cover all individual modules, supplied or created interfaces, and any ancillary product that is purchased from the awarded vendor. In addition, the awarded vendor will warrant and guarantee the seamless integration and interface of modules proposed herein. Bidders must warrant to TRL that software specifications, capabilities, and performance characteristics are as stated in the proposal and accompanying documentation. Submission of a Proposal will represent your agreement to these conditions.

Software Versions- TRL will not accept Beta versions of the software. All applications are to have a referenceable install base and thorough testing.