



**Request for Proposals to Provide
Integrated Library Systems Contract**

**Date of Issuance: July 1, 2025
Proposals Due: 3:00pm PDT on August 6, 2025**

I. GENERAL PROJECT DESCRIPTION

A. Introduction

1. Project Background and Description

The Sonoma County Library ("Library") is a countywide system providing library services to the Sonoma County area with its population of 482,000. It encompasses all nine cities and unincorporated areas. A Joint Powers Agreement created in 1975, and revised in 2014, established the Library as a separate public agency. Today, the Library serves half a million county residents at 12 regional libraries, two rural stations, three special collections, a BiblioBus, and a wide variety of digital resources.

The Sonoma County Library Commission is an 11-person body responsible for governing the Library. Commissioners are appointed by the cities in Sonoma County and the Sonoma County Board of Supervisors.

The Library's mission is to create community through discovery, culture and connection. We are known nationally for our innovation, and locally for our connection to our residents and communities. We are also a community hub where learning, the arts, technology, and people come together to discover, learn, and share.

In addition to Sonoma County residents, the Library also provides ILS services for neighboring Lake and Mendocino County Library Systems. The Lake County Library serves its county of 68,000 residents with four library locations along with one bookmobile providing library services. The Mendocino County Library serves its county of 89,100 with six library locations along with one bookmobile.

Relevant integrated library system approximate Fiscal Year 2024 statistics include:

Library ILS	SirsiDynix Horizon 7.6
Number of Patrons	317,200
Number of Public Service Locations	29
Number of Staff User Accounts	500
Annual Circulation FY24	4,715,000
Number of Bibliographic Records	440,300
Number of Library Items	1,088,000

2. Objective of This Request for Proposals

Sonoma County Library is requesting proposals from vendors to provide and implement an Integrated Library System (ILS) by **August 24, 2026**. The selected solution must offer a robust, user-friendly product that enables library staff to provide efficient and effective service to patrons.

Award of a Contract will be made to One (1) vendor on a competitive basis following the process, terms and conditions as described in this Solicitation.

Contract will be for a term of Five (5) years, with option to renew for a minimum of Two (2) additional consecutive one (1) year terms thereafter unless earlier terminated pursuant to the terms and conditions of the Contract.

Vendors shall provide pricing based on the requirements. The proposed cost shall remain in effect for the duration of the Contract which includes the initial term, Five (5) years and Two (2) additional consecutive one (1) year terms.

B. Scope of Work and Process

I. Project Overview

Since 2004 the library has utilized the SirsiDynix Horizon system, now on version 7.6. The Library is seeking a vendor to implement and support an ILS that meets requirements listed in Attachment D. A summary of the core functionality sought includes:

1. Acquisitions
 - Provide a process for the Library to order and invoice through EDI (Electronic Data Interchange); accommodate enriched EDI data for electronic ordering, confirmation, receiving, and invoicing
 - Seamlessly interface with major vendors including Baker and Taylor, Brodart, Ingram, and Midwest Tape for selection using vendor carts, ordering, order confirmation, invoicing and receiving processes
 - Ability to keep track of vendors, funds, encumbrances, purchase orders, cancellations and expenditures
2. Cataloging
 - Support the following MARC 21 formats, without limitation on record length except as consistent with MARC standards: Bibliographic data, Holdings data, Authority data, and Classification data
 - Support RDA (Resource Description and Access), FRBR (Functional Requirements for Bibliographic Records) and will remain compatible with any future developing cataloging standards.
 - Support holdings statements of multi-part items as defined in ANSI/NISO Z39.71 Holdings Statements for Bibliographic Items
 - Ability to create and delete item records

- Full screen editing (instead of one tag at a time) including copy and paste and other easy editing (like OCLC Connexion)
 - Custom formatting for bib label and spine label printing
 - Support for UTF-8 (Unicode) character sets
3. Circulation
- Staff interface for standard circulation functions:
 - Create/edit/merge/delete patron records
 - Create/manage holds
 - Check-in/checkout items
 - Create blocks and account messages
 - Assess/pay fines and fees
 - Multiple locations, item types, borrower types, etc. With the ability to set circulation limits for each (number of holds, checkouts, etc.).
 - Patron notification via phone, email, and/or SMS for hold ready, pre-overdue, overdue, etc.
 - Facilitate priority-based holds for a consortia environment
 - Automatic renewal of items that do not have holds
4. Serials
- Ability to create and manage serial records and subscriptions
 - Maintain prediction patterns for various enumeration and chronology, issues, serial holdings, routing lists and claims
 - Ability to check-in issues and print issue labels
 - Provide Summary of holding information
5. Resource Sharing
- Ability to integrate with resource sharing lending and borrowing via California's INN-Reach system called LINK+ and other ILL options
 - Provide reports on LINK+ activity including in transit too long, requested too long, paged too long, institutional overdues, returned too long, received too long, and borrowed
 - Support the following:
 - ISO ILL Protocol standards
 - ISO 10160
 - 10161-1
 - ISO-compliant ILL Protocol Machine application interacts with the other components of the library system, particularly circulation and finance applications
6. Analytics
- Provide a flexible report generator which does not require any specialized SQL (tec.) or programming experience
 - Have complex reporting capabilities with SQL, ODBC, or equivalent access into the database via external report writers to produce more complicated reports
 - Provide emailed canned reports which are available when using relevant functions of the system (e.g. circulation or acquisitions)

7. Integrations
 - Must integrate seamlessly with BiblioCommons
 - Must integrate with Lyngsoe Systems AMH equipment
 - Provide SIP2 connections with multiple ports that enable third party vendors to communicate with system
 - Allow external hardware to input data (barcode readers, RFID pads, and Automated Materials Handling)
 - Robust API
8. System
 - ILS provided as a Software as a Service (SaaS) model hosted by the Vendor.
 - Security, backups, and update handled by Vendor.
 - Ability for library staff to remotely access ILS via web interface.
 - Provide a training/backup database for use in staff training or testing policy changes.

Specifications/Qualification(cont.)

The Library is seeking the professional support of a vendor or vendors experienced and knowledgeable in providing and implementing an Integrated Library System. Vendor(s) will be selected and provide a 100% implementation, including required integrations, and day to day operations and support of the service. The new solution must be fully implemented by **August 24, 2026**.

Attachment D contains a full list of requirements which must be completed and returned with proposal responses.

II. Deliverables (service levels, reporting, milestones, etc.)

III.

- Vendor must adhere to a service-level agreement (SLA) defined in requirements
 - Support must be available 24/7/365
 - Vendor must meet a 4-hour issue response time and a 48-hour issue resolution time
 - For emergency issues or system-wide outage, Vendor must meet a 30-minute issue response time and a 4-hour issue resolution time
 - If response time is not met, vendor must provide a documented exception process for issue resolution
 - Vendor must participate in Weekly Status Calls with the Library for the duration of the project
 - Vendor must collaborate and agree on a Milestone Payment Structure with the Library

The selection of one proposal will be made pursuant to the process described below. Upon selection, the Library will finalize the terms of the contract with the selected proposer. The contract shall be in substantially the same form as the Library's Sample Agreement, attached hereto as **Attachment A**, and a proposer agrees to be bound by identical, or substantially the same, terms as those in the Sample Agreement. The initial term of the contract shall be for five (5) years, with an option to extend; however, the contract term is subject to change and may be amended.

The resulting contract will be of no force or effect until signed by both parties. Performance shall not commence until a valid contract has been executed between the successful proposer and the Library. The Library shall not pay for any goods or services performed prior to execution of a valid contract.

C. Notice of RFP

People or organizations interested in, intending to apply, or actually applying to this RFP are recommended to add their name and contact information to the Library's contact list for this RFP in order to receive notice related to the same. The Library is not responsible for not giving notice to any person or organization who has not properly submitted their contact information.

To request notice, email the Library's contact person listed immediately below, stating your request for notice, and expressly referring to this RFP:

Mike Dawe
E-Mail: ILS_RFP@sonomalibrary.org

D. Schedule

The following Schedule applies to this RFP ("Schedule"). The Schedule is subject to change and, except as provided below, changes will be made by written amendment distributed to every person who has requested notice related to this RFP.

DATE	EVENT
July 1, 2025	Release of Request for Proposals
July 11, 2025	Proposers' written questions due via email by 5:00 p.m. PDT
July 23, 2025	Library's written responses to questions distributed via email by 5:00 p.m.PDT
August 6, 2025	Proposals due via email by 3:00 p.m. PDT
August 7-20, 2025	Proposals evaluated by Library's Evaluation Committee
September 15-18, 2025	Interviews conducted (if applicable)
October 1, 2025	Notice of Intent to Award issued
November 5, 2025	Contract presented to Library Commission for approval

E. Questions

Proposers may submit written questions regarding this RFP via email to the contact person below on or before the date listed in the Schedule. The Library will respond to each properly-submitted question in writing via email on or before the date set forth in the Schedule. The Library's will send each question and answer to every vendor who has requested notice regarding this RFP.

Questions regarding this RFP should be sent via e-mail to the Library's contact person:

Mike Dawe
E-Mail: ILS_RFP@sonomalibrary.org

All questions and responses must be in writing; no verbal communications between a proposer and Library staff regarding the substance of a pending RFP are permitted, and any verbal representations provided by Library staff are not binding on the Library.

If a proposer discovers any ambiguity, conflict, discrepancy, omission, or other error in this RFP, the proposer shall immediately notify the Library's contact person of such perceived error. Modifications to this RFP may be made by addenda, which then become part of this RFP.

F. Amendment, Withdrawal, Rejection, or Multiple Awards of RFP

The Library reserves the right to amend any portion of this RFP on or before the proposal submission deadline listed in the Schedule by issuing written notice to all persons and organizations who have requested notice.

The Library may reject any or all proposals and may or may not waive an immaterial deviation or defect in a proposal. The Library's waiver of an immaterial deviation or defect shall in no way modify the RFP or excuse a proposer from full compliance with solicitation document specifications. The Library reserves the right to accept or reject any or all of the items in the proposal, to award the contract in whole or in part and/or negotiate any or all items with individual proposers if it is deemed in the Library's best interest. Moreover, the Library reserves the right to make no selection if proposals are deemed to be outside the fiscal constraint or against the best interest of the Library.

In addition to the right to reject any and all proposals, in whole or in part, the Library also reserves the right to issue similar RFPs in the future. This RFP is in no way an agreement, obligation, or contract and in no way is the Library responsible for the cost of preparing any proposal submitted in response to the RFP.

II. SUBMISSION OF PROPOSALS

A. Proposal Length and Format

The intent of this RFP is to encourage prospective vendors to submit proposals which clearly communicate their understanding of the Library's project requirements and the services it seeks. Proposals submitted in response to this RFP must follow the format outlined below. Proposals that do not follow the form, content, or procedures outlined in

this RFP shall be considered nonresponsive and rejected without further consideration.

1. Written Proposals

Proposals must in writing and signed by the proposer or its authorized representative. Proposals shall be limited in length to no more than 75 single-sided pages, including photographs or graphic materials. Tabs with graphics and folded-out pages will be counted toward the 75-page limit.

2. Submission Copies and Due Date

Proposals will only be accepted via email. Only one copy is required. Proposers must submit their proposals by email to:

ILS_RFP@sonomalibrary.org

Proposals must be received by 3:00 p.m PDT on August 6, 2025.

Proposals received after this time, in any other manner, or at any other location will not be accepted.

3. Proposal Contents

For ease of review and to facilitate evaluation, proposals for this project should be organized and presented in the following order using the section titles indicated.

a. Section I - Letter of Transmittal

The proposal must include a cover letter of transmittal attesting to its accuracy, signed by an individual authorized to execute binding legal documents on behalf of the vendor.

- The cover letter shall provide the name, address, telephone and facsimile numbers of the vendor along with the name, title, address, telephone and facsimile numbers of the executive that has the authority to Contract with County.
- Each vendor shall make the following representations and warranty in the cover letter, the falsity of which might result in rejection of its proposal: "The information contained in this proposal or any part thereof, including any exhibits, schedules, and other documents and instruments delivered or to be delivered to County, is true, accurate, and complete. This proposal includes all information necessary to ensure that the statements therein do not in whole or in part mislead Library as to any material facts."
- The cover letter must identify any trade secret issues/proprietary and/or confidential information.

b. Section II - Executive Summary

A summary describing the vendor's understanding of the County's requirements/specifications and the proposed solution.

- A proposed total cost for the project.
- A brief summary of the proposed total cost.
- A summary of the approach to be undertaken to perform the services.
- Highlights of any superior or unique aspects of the proposal.
- A training philosophy for library staff that includes:
 - System administrator
 - Technical services
 - Front library public service
- If applicable, identification of the proposed project team (including responsibilities).
- If you wish to add supplemental information, please be sure the additional attachment(s) is labeled "Supplemental Information."

c. Section III - Statement of Work

Vendors must submit a Statement of Work to demonstrate competency in performing services as defined in this Solicitation.

- Include detailed description of the services to be completed along with sufficient information for the Library to determine if the vendor meets each requirement.
- The Library has identified the requirements for this Solicitation in the Scope of Work section as well as the System Requirements.
- Include a proposed Implementation schedule that includes major milestones and staff training.

d. Section IV – Vendor Company Information and Experience:

In the "Vendor Company Information and Experience" section, please copy, complete, and attach to your proposal the table of criteria listed in **Attachment B**.

e. Section V – Vendor References

In the Vendor References section please copy, complete, and attach to your proposal the table of criteria listed in **Attachment C**.

f. Section VI -System Requirements:

In the "System Requirements" section, please copy, complete, and attach to your proposal the table of criteria listed in **Attachment D**.

g. Section VI – Pricing Worksheet:

In the "Pricing Forms" section, please provide a complete list of anticipated hardware and software costs for all components and equipment related to the project as well as all costs for services including installation, training, and ongoing support and maintenance. Proposers are encouraged to copy, complete, and attach to your proposal the table of criteria listed in **Attachment E**, but not required. Vendors may include a detailed quote sheet in place of completing the criteria listed in **Attachment E**. If both purchase and

leasing options are available, complete sections.

Quantities listed are estimates.

h. Section VII – Supplemental Questions and Additional Information:

In the "Supplemental Questions and Additional Information" section, please answer the questions in **Attachment F** and include any additional information you believe is pertinent to consideration of your proposal.

i. Section VIII – Identification of Sub-Contractors:

The library does not anticipate the need for a proposer to rely on sub-contractors for this project and prefers that a proposer not do so.

In the "Identification of Sub-Contractors" section, if subcontractors are needed, identify any sub-contractors you intend to use for the proposed scope of work for the project. For each subcontractor listed, please indicate: (1) what products and/or services are to be supplied by that subcontractor; (2) what percentage of the overall scope of work that subcontractor will perform; and (3) qualifications of each subcontractor to perform the identified scope of work.

B. Proposal Duration and Contract Timing Requirements

All proposals will remain in effect and shall be legally binding for at least one hundred and twenty (120) days after the proposal submission due date listed in the Schedule.

Unless otherwise authorized by the Library, the selected vendor will be required to execute a contract with the Library for the services requested within sixty (60) days of the Library's issuance of the notice of intent to award. If agreement on contract terms and conditions acceptable to the Library cannot be achieved within that timeframe, or if it appears that an agreement will not be possible after reasonable negotiations have been conducted (as determined at the sole discretion of the Library), then the Library reserves the right to retract the notice of intent to award and proceed with awards to other vendors, or to withdraw this RFP.

C. Withdrawal and Submission of Modified Proposals

A proposer may withdraw a proposal at any time prior to the submission deadline listed in the Schedule by submitting a written notification of withdrawal signed by the proposer or its authorized agent. Another proposal may be submitted prior to the deadline. A proposal may not be changed after the designated deadline for submission of proposals.

D. Confidentiality of Information Contained in Proposals

1. Disclosure of Proposal Contents

All proposals and other materials submitted in response to this RFP procurement process

become the property of the Library. Selection or rejection of a proposal does not affect this right. All proposal information, including detailed price and cost information, shall be held in confidence during the evaluation and selection process. Upon the completion of the evaluation and selection process, indicated by approval of a contract for services emanating from this RFP by the Library Council or by rejection of all proposals, the proposals and associated materials shall be open for review by the public to the extent required by the California Public Records Act. By submitting a proposal, the responding firm acknowledges and accepts that the contents of the proposal and associated documents shall become open to public inspection.

2. Proprietary Information

The master copy of each proposal shall be retained for official files and will become public record after the award of a contract unless the proposal or specific parts of the proposal can be shown to be exempt by law. Each responding firm may clearly label part of a proposal as "CONFIDENTIAL." In doing so, the responding firm thereby agrees to indemnify and defend the Library. The failure to so label any information that is released by the Library shall constitute a complete waiver of all claims for damages caused by or related to any release of the information. If a public records request for labeled information is received by the Library, the Library will endeavor to notify the responding firm of the request and delay access to the material until seven (7) working days after the Library's receipt of the public records request. Within that time delay, it will be the duty of the responding firm to act in protection of its labeled information. Failure to so act shall constitute a complete waiver

E. Disqualification or Rejection of Proposal

The Library may, at its sole discretion, disqualify or reject a proposal if it fails to furnish all information requested in this RFP, fails to follow the format requested in this RFP, or contains false, incomplete, misleading or unresponsive statements.

III. SELECTION PROCESS

A. Evaluation Committee to Review Proposals

The Library shall form an Evaluation Committee to review the content of all proposals submitted in response to this RFP. The Evaluation Committee may be comprised of Library employees or officers, Commission members, or persons outside of the Library. The Evaluation Committee shall review and evaluate all timely proposals based on the terms of this RFP and shall make a recommendation for selection of a vendor to the Library Commission. The Library Commission is ultimately responsible for approving any contract to be awarded under this RFP, in its sole discretion.

Those Library employees who have a conflict of interest with a person or business entity submitting a proposal shall not participate in the review or selection process, per Government Code § 87100. Any person or business entity submitting a proposal who has such a relationship with a Library employee who may be involved in the selection process shall advise the Library of the name of its employee in the proposal.

The Evaluation Committee may reject any or all proposals, or portions thereof, if it determines that it is in the Library's best interests to do so.

B. Evaluation Criteria

Proposals may be evaluated using the following criteria (there is no value or ranking implied in the order of this list):

1. **25%** - Demonstrated ability to perform the functionality described in the RFP;
2. **20%** - Experience, qualifications, and expertise;
3. **15%** - Fees and costs relative to the scope of services;
4. **15%** - Implementation Schedule;
5. **10%** - A demonstrated history of providing similar products to comparable entities;
6. **10%** - Willingness to accept the Library's contract terms in the Sample Agreement (**Attachment A**); and
7. **5%** - Any other factors the Evaluation Committee deems relevant. (When such criteria are used for evaluation purposes, the basis for scoring will be clearly documented and will become part of the public record.)

C. Defects in Proposals

An error in a proposal may cause the Evaluation Committee to reject that proposal; however, the Evaluation Committee may, in its sole discretion, retain the proposal and make certain corrections if the proposer's intent is clearly established based on review of the complete proposal submitted. The Evaluation Committee may also correct obvious clerical errors.

D. Additional or Supplemental Information

The Evaluation Committee may, during the evaluation process, request any proposer to provide additional information which the Evaluation Committee deems necessary to evaluate the proposer's ability to perform the required services. Such information shall be required to be provided in writing, and shall become part of the proposal on record.

E. Interviews

After initial screening, the Evaluation Committee will select those proposers deemed most qualified for this project for further evaluation. Interviews of those selected proposers may be conducted as part of the final selection process, including a device demonstration. Interviews may or may not have their own separate scoring during the evaluation process.

F. Selection of Proposals

The Library reserves the right to select the proposal(s) which in its sole judgment best meets its needs, and to award a contract to one or multiple qualified submittals. ***The lowest proposed cost is not the sole criterion for recommending a contract award.***

The Library also makes no guarantee of any or equal amounts of work for the project which is the subject of this RFP. Further, the Library is not responsible for any costs incurred in the preparation or submission of a proposal or any work performed prior to the execution of a contract.

IV. CONTRACT AWARD

A. Notice of Intent to Award Contract

Upon selecting a proposal, the Library will enter into contract negotiations with the chosen vendor. If such negotiations are unsuccessful, the Library will proceed to negotiate with the proposer who scored next highest in rank.

Upon successful completion of contract negotiations, all proposers who have submitted proposals in response to this RFP will be provided with notice as to the successful vendor through a notice of intent to award contract.

B. Contract Award

The Evaluation Committee will make a recommendation on awarding a contract to the Library Commission. No contract will be in effect until approved by the Library Commission.

This RFP does not commit the Library to award a contract. The Library has absolute discretion in awarding a contract and reserves the right to waive informalities and irregularities in this RFP and/or the proposals received. The Library reserves the right to accept or reject any or all proposals or to modify or cancel this RFP in part or its entirety.

C. Protest Process

Any protests to this RFP, the selection process, or the awarded contract must be in writing and must comply with the requirements set forth in the Library's Purchasing and Bid Protest Policy and Procedures, found on the Library's website in the [Policies and Procedures section](#).

Attachments:

Attachment A: Sample Contract

Attachment B: Vendor Company Information and Experience

Attachment C: Vendor References

Attachment D: System Requirements

Attachment E: Pricing Worksheet

Attachment F: Supplemental Questions and Additional Information

Attachment A – Sample Contract

PROFESSIONAL SERVICES AGREEMENT

This Agreement is entered into this ___ day of _____, 20__ ("Effective Date") by and between the Sonoma County Library, a California joint powers authority ("Library"), and _____ ("Consultant"), pursuant to the terms and conditions set forth below ("Agreement"). Library and Consultant are collectively referred to herein as the "parties" and singularly as "party."

RECITALS

A. Library seeks a consultant to provide the services and equipment necessary to update its self-checkout station at all Library locations and issued a request for proposals on February 9, 2024, in order to identify such a consultant ("RFP"), the terms and conditions of which are incorporated herein by reference as if set forth in full; and

B. Consultant has presented a proposal for such services to the Library, dated _____, 20__, (attached hereto as **Exhibit A**, and incorporated herein by reference) and is duly licensed, qualified and experienced to perform those services.

NOW THEREFORE, in consideration of the mutual covenants contained herein, the parties agree as follows:

AGREEMENT

1. Scope of Services.

1.1 Consultant's Specified Services. Consultant shall perform the services described in the attached **Exhibit A**, which is incorporated herein (hereinafter referred to as the "Scope of Work"), and within the times or by the dates as provided therein (the "Schedule of Performance"). In the event of a conflict between the body of this Agreement and its exhibits, the provisions in the body of this Agreement shall control. Consultant agrees it has satisfied itself by its own investigation and research regarding the conditions affecting the work to be done and labor and materials needed, and that its decision to execute this Agreement is based on such independent investigation and research

1.2 Cooperation. The parties shall cooperate with each other in the performance of this Agreement.

1.3 Performance Standard. Consultant shall perform all work hereunder in a manner consistent with the level of competency and standard of care normally observed by a person practicing in Consultant's profession. If the Library determines that any of Consultant's work is not in accordance with such level of competency and standard of care, Library, in its sole discretion, shall have the right to do any or all of the following: (a) require Consultant to meet with the Library to review the quality of the work and resolve matters of concern; (b) require Consultant to repeat the work at no additional charge until it is satisfactory; (c) terminate this Agreement pursuant to the provisions of Section 4; or (d) pursue any and all other remedies at law or in equity.

2. Payment.

2.1 For all services and incidental costs required hereunder, Consultant shall be paid in accordance with the rates and terms set forth in **Exhibit B**, attached hereto and incorporated herein. Payments shall be made based on the hours of services actually provided, but in no event shall the total payable under this Agreement exceed \$ _____ without the Library's prior, written

Attachment A – Sample Contract

approval.

2.2 If Consultant's performance is not in conformity with the Schedule of Performance, payments may be delayed or denied, unless the Consultant's failure to perform in conformity with the Schedule of Performance is a documented result of the Library's failure to conform with the Schedule of Performance, or if the Schedule of Performance is extended pursuant to Section 3.2.

2.3 If the work is halted at the request of the Library, compensation shall be based upon the proportion that the work performed bears to the total work required by this Agreement, subject to Section 4.4.

3. Term of Agreement.

3.1 The term of this Agreement shall be from _____, 20__ through _____, 20__, unless terminated earlier in accordance with the provisions of Section 4, below.

3.2 The Library Director or the Director's designee may, by written instrument signed by the Parties, extend the duration of this Agreement for a period mutually agreed to by parties in the manner provided in Section 8, provided that the extension does not require the payment of compensation in excess of the maximum compensation set forth in Section 2, Payment.

4. Termination.

4.1 Termination without Cause. Notwithstanding any other provision of this Agreement, at any time and without cause, the Library shall have the right, in its sole discretion, to terminate this Agreement by giving 30 days written notice to Consultant.

4.2 Termination for Cause. Notwithstanding any other provision of this Agreement, should Consultant fail to perform any of her obligations hereunder, within the time and in the manner herein provided, or otherwise violate any of the terms of this Agreement, the Library may immediately terminate this Agreement by giving Consultant written notice of such termination, stating the reason for termination.

4.3 Delivery of Work Product and Final Payment Upon Termination. In the event of termination, Consultant shall deliver all materials and work product created pursuant to this Agreement to the Library within 14 days following the date of termination, and shall submit all required invoices.

4.4 Payment Upon Termination. Upon termination of this Agreement by the Library Consultant shall be entitled to receive full payment for all services satisfactorily rendered and expenses incurred hereunder. However, if the Library terminates the Agreement for cause pursuant to Section 4.2, then it shall deduct from such payment the amount of damage, if any, sustained by Library by virtue of the breach of the Agreement by Consultant.

4.5 Suspension of Performance. The Library may temporarily suspend this Agreement, at no additional cost to Library, provided that the Consultant is given written notice (delivered by certified mail, return receipt requested) of temporary suspension. If Library gives such notice of temporary suspension, Consultant shall immediately suspend its activities under this Agreement.

4.6 Authority to Terminate. The Library Director has the authority to terminate this Agreement on behalf of the Library.

Attachment A – Sample Contract

5. Indemnification. Consultant agrees to accept all responsibility for loss or damage to any person or entity, and to defend, indemnify, hold harmless and release the Library (including its commissioners, officers, agents, and employees) from and against any and all actions, claims, damages, disabilities or expenses that may be asserted by any person or entity, including Consultant, that arise out of, pertain to, or relate to Consultant's performance or obligations under this Agreement. Consultant agrees to provide a complete defense for any claim or action brought against the Library based upon a claim relating to Consultant's performance or obligations under this Agreement. This provision shall be interpreted broadly in favor of the Library, and Consultant's obligations under this provision apply whether or not there is concurrent negligence on the Library's part, but to the extent required by law, excluding liability due to the Library's conduct. This indemnification obligation is not limited in any way by any limitation on the amount or type of damages or compensation payable to or for Consultant or her agents under workers' compensation acts, disability benefits acts, or other employee benefit acts.

6. Insurance. With respect to performance of work under this Agreement, Consultant shall maintain insurance as described in Exhibit C, which is attached hereto and incorporated herein by this reference.

7. Prosecution of Work. The execution of this Agreement shall constitute Consultant's authority to proceed immediately with the performance of this Agreement. Performance of the services hereunder shall be completed within the time required herein, provided, however, that if the performance is delayed by earthquake, flood, high water, fire, or other Act of God or by strike, lockout, or similar labor disturbances, the time for Consultant's performance of this Agreement shall be extended by a number of days equal to the number of days Consultant has been delayed.

8. Amendments, Changes or Modifications. Extra or changed work or other changes to the Agreement may be authorized only by written amendment to this Agreement, signed by both parties. Minor changes, which do not increase the amount paid under the Agreement, and which do not significantly change the scope of work or significantly lengthen time schedules may be executed by the Director in a form approved by the Library's General Counsel. The Library must authorize all other extra or changed work. Failure of Consultant to secure such written authorization for extra or changed work shall constitute a waiver of any and all right to adjustment in the Agreement price or Agreement time due to such unauthorized work and thereafter Consultant shall be entitled to no compensation whatsoever for the performance of such work. Consultant further expressly waives any and all right or remedy by way of restitution and quantum meruit for any and all extra work performed without such express and prior written authorization of the Library.

9. Representations of Consultant.

9.1 Standard of Care. Library has relied upon the professional ability and training of Consultant as a material inducement to enter into this Agreement. Consultant hereby agrees that all her work will be performed in accordance with generally accepted and applicable professional practices and standards as well as the requirements of applicable federal, state and local laws, it being understood that acceptance of Consultant's work by the Library shall not operate as a waiver or release. Consultant represents that she is properly licensed in the jurisdiction where the project is located to provide the services required by this Agreement, or shall cause such services to be performed by appropriately licensed professionals.

9.2 Compliance with Laws. Consultant shall comply with all applicable laws, ordinances, and codes of federal, State and local governments, and shall commit no trespass on any public or private property in performing any of the work authorized by this Agreement.

Attachment A – Sample Contract

9.3 Status of Consultant. The parties intend for Consultant to perform services under this Agreement as an independent contractor, and further agree that: (a) Consultant is free from the control and direction of the Library in performing services under this Agreement; (b) the services to be performed under this Agreement are outside the usual course of the Library's business; and (c) Consultant is customarily engaged in an independently-established business of the same nature as the services to be performed for the Library under this Agreement. In the event the Library exercises its right to terminate this Agreement pursuant to Section 4, above, Consultant expressly agrees that it shall have no recourse or right of appeal under rules, regulations, ordinances, or laws applicable to employees

9.4 Taxes. Consultant agrees to file federal and state tax returns and pay all applicable taxes on amounts paid pursuant to this Agreement and shall be solely liable and responsible to pay such taxes and other obligations, including, but not limited to, state and federal income and FICA taxes. Consultant agrees to indemnify and hold the Library harmless from any liability which it may incur to the United States or to the State of California as a consequence of Consultant's failure to pay, when due, all such taxes and obligations. In case the Library is audited for compliance regarding any withholding or other applicable taxes, Consultant agrees to furnish the Library with proof of payment of taxes on these earnings.

9.5 Records Maintenance. Consultant shall keep and maintain full and complete documentation and accounting records concerning all services performed that are compensable under this Agreement and shall make such documents and records available to the Library for inspection at any reasonable time. Consultant shall maintain such records for a period of four (4) years following completion of work hereunder.

9.6 Conflict of Interest. Consultant covenants that she presently has no interest, and that will not acquire any interest, direct or indirect, that represents a financial conflict of interest under state law or that would otherwise conflict in any manner or degree with the performance of her services hereunder.

9.7 Nondiscrimination. Consultant shall comply with all applicable federal, state, and local laws, rules, and regulations in regard to nondiscrimination in employment because of race, color, ancestry, national origin, religion, sex, marital status, age, medical condition, pregnancy, disability, sexual orientation or other prohibited basis. All nondiscrimination rules or regulations required by law to be included in this Agreement are incorporated herein by this reference.

9.8 Ownership and Disclosure of Work Product.

9.8.1. All materials prepared by the Consultant under this Agreement shall become the property of the Library, and the Consultant shall have no property right therein whatsoever. Immediately upon termination, the Library shall be entitled to, and the Consultant shall deliver to the Library, all data, drawings, specifications, reports, estimates, summaries and other such materials as may have been prepared or accumulated to date by the Consultant in performing this Agreement which is not Consultant's privileged information, as defined by law, or Consultant's personnel information, along with all other property belonging exclusively to the Library which is in the Consultant's possession. Consultant may retain copies of the above-described materials but agrees not to disclose or discuss any information gathered, discovered, or generated in any way through this Agreement without the express written permission of the Library.

9.8.2. Additionally, it is agreed that the parties intend this to be a contract for services and each considers the products and results of the services to be rendered by Consultant

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hereunder (the “Work”) to be a work made for hire. Consultant acknowledges and agrees that the Work (and all rights therein, including, without limitation, copyright) belongs to and shall be the sole and exclusive property of the Library.

10. Demand for Assurance. Each party to this Agreement undertakes the obligation that the other’s expectation of receiving due performance will not be impaired. When reasonable grounds for insecurity arise with respect to the performance of either party, the other may in writing demand adequate assurance of due performance and until such assurance is received may, if commercially reasonable, suspend any performance for which the agreed return has not been received. “Commercially reasonable” includes not only the conduct of a party with respect to performance under this Agreement, but also conduct with respect to other agreements with parties to this Agreement or others. After receipt of a justified demand, failure to provide within a reasonable time, but not exceeding thirty (30) days, such assurance of due performance as is adequate under the circumstances of the particular case is a repudiation of this Agreement. Acceptance of any improper delivery, service, or payment does not prejudice the aggrieved party’s right to demand adequate assurance of future performance. Nothing in this Section 10 limits the Library’s right to terminate this Agreement pursuant to Section 4.

11. Assignment and Delegation. Neither party hereto shall assign, delegate, sublet, or transfer any interest in or duty under this Agreement without the prior written consent of the other, and no such transfer shall be of any force or effect whatsoever unless and until the other party shall have so consented. However, claims for money due or to become due Consultant from the Library under this Agreement may be assigned to a financial institution, or to a trustee in bankruptcy, without such approval. Notice of any such assignment or transfer whether voluntary or involuntary shall be furnished promptly to the Library.

12. Method and Place of Giving Notice, Submitting Bills and Making Payments. All notices, bills, and payments (“notices”) shall be made in writing and may be given by personal delivery, U.S. Mail, or courier service (such as Federal Express). Whenever possible, an additional courtesy copy of any notice shall also be provided via email. Notices sent by mail, delivery or courier shall be addressed as follows:

FOR LIBRARY
Erika Thibault, Director
Sonoma County Library
6135 State Farm Drive
Rohnert Park, CA 94928
ethibault@sonomalibrary.org

FOR CONSULTANT

When so addressed, notices shall be deemed given upon deposit in the U.S. Mail, or express mail service, postage prepaid. In all other instances, notices shall be deemed given at the time of actual delivery. Any changes to the names and addresses for notice purposes shall be provided in writing.

13. Miscellaneous Provisions.

13.1 Merger. This Agreement is intended both as the final expression of the Agreement between the parties hereto with respect to the included terms and as a complete and exclusive statement of the terms of the Agreement, pursuant to California Code of Civil Procedure § 1856. No modification of this Agreement shall be effective unless and until such modification is evidenced by a writing signed by both parties.

13.2 No Waiver of Breach. The waiver by the parties of any breach of any term or

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promise contained in this Agreement shall not be deemed to be a waiver of such term or promise, or any subsequent breach or promises contained in this Agreement.

13.3 No Third Party Beneficiaries. Nothing contained in this Agreement shall be construed to create and the parties do not intend to create any rights in third parties.

13.4 Construction. To the fullest extent allowed by law, the provisions of this Agreement shall be construed and given effect in a manner that avoids any violation of statute, ordinance, regulation, or law. Consultant and the Library acknowledge that they have each had an adequate opportunity to consult with counsel in the negotiation and preparation of this Agreement.

13.5 Applicable Law and Forum. This Agreement shall be construed and interpreted according to California Law, and any action or proceeding to enforce this Agreement or for the breach thereof shall be brought or tried in the County of Sonoma.

13.6 Counterparts. This Agreement may be executed in several counterparts and all counterparts so executed shall constitute one agreement that shall be binding on all of the parties, notwithstanding that all of the parties are not signatory to the original or same counterpart. This Agreement may be signed electronically. By signing this document in electronic form, the parties agree that this Agreement may be transmitted and signed electronically by all Parties, and that such signatures shall have the same force and effect as original signatures, in accordance with California law and regulations, including but not limited to Civil Code section 1633.7

13.7 Time of Essence. Time is and shall be of the essence of this Agreement and every provision hereof.

13.8 Authority. The parties represent and warrant that the persons signing this Agreement are duly authorized to enter into and execute this Agreement on behalf of their respective principals.

[Signatures on Following Page]

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IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be entered into by Library and Consultant on the date first written above.

SONOMA COUNTY LIBRARY,
a California joint powers authority

CONSULTANT,

ERIKA THIBAUT
Director

Name:
Title:

APPROVED AS TO FORM:
KRONICK, MOSKOVITZ,
TIEDEMANN & GIRARD,
a professional corporation

By: _____
JEFFREY A. MITCHELL
Library Counsel

ATTACHED
EXHIBIT A **Scope of Work Dated** _____
EXHIBIT B **Payment Terms**
EXHIBIT C **Insurance Requirements**

EXHIBIT A
Scope of Work

EXHIBIT B

Payment Terms

EXHIBIT C

Insurance Requirements

- A. Required Insurance. With respect to performance of work under this Agreement, Consultant shall maintain insurance as described below unless such insurance has been expressly waived by the Library through a Waiver of Insurance Requirements. Any requirement for insurance to be maintained after completion of the work shall survive this Agreement.

The Library reserves the right to review any and all of the required insurance policies and/or endorsements, but has no obligation to do so. Failure to demand evidence of full compliance with the insurance requirements set forth in this Agreement (or failure to identify any insurance deficiency) shall not relieve Consultant from, nor be construed or deemed a waiver of, her obligation to maintain the required insurance at all times during the performance of this Agreement. The maintenance by Consultant and its contractors and subcontractors of the following coverage and limits of insurance is a material element of this Agreement. The failure of Consultant or of any of its contractors or subcontractors to maintain or renew coverage or to provide evidence of renewal may be treated by the Library as a material breach of this Agreement. Approval of the insurance by the Library shall not relieve or decrease any liability of Consultant.

1) Worker's Compensation and Employer's Liability Insurance

- a) Worker's Compensation - Insurance to protect the Consultant, its contractors and subcontractors from all claims under Worker's Compensation and Employer's Liability Acts, including Longshoremen's and Harbor Worker's Act ("Acts"), if applicable. Such coverage shall be maintained, in type and amount, in strict compliance with all applicable state and Federal statutes and regulations. If required by law, Consultant shall execute a certificate in compliance with Labor Code Section 1861, on a form acceptable to the Library.
- b) Consultant shall provide a Waiver of Subrogation endorsement in favor of the Library, its officers, officials, employees, agents and volunteers for losses arising from work performed by the Consultant.

2) Commercial General Liability Insurance

- a) The insurance shall be provided on form CG0001, or its equivalent, and shall include coverage for claims for bodily injury or property damage arising out of premises/operations, products/completed operations, contractual liability, and subconsultant's work and personal and advertising injury resulting from actions, failures to act, or operations of the insured, or by its employees or agents, or by anyone directly or indirectly employed by the insured. The amount of insurance coverage shall not be less than **\$2,000,000.00** per occurrence and **\$4,000,000** general and products/completed operations aggregates.
- b) The commercial general liability insurance shall also include the following:
 - i) Endorsement equivalent to CG 2010 0714 naming the Library, its officers, officials, employees, agents, and volunteers as additional insureds. The endorsement shall contain no special limitations on the scope of protection afforded to the Library, its officers, officials, employees or volunteers.
 - ii) Endorsement stating insurance provided to the Library shall be primary as respects the Library, its officers, officials, employees and any insurance or self insurance maintained by the Library, its officers, officials, employees or volunteers shall be

Attachment A – Sample Contract

in excess of the Consultant's insurance and shall not contribute with it, to the payment or satisfaction of any defense expenses, loss, or judgment.

- iii) Provision or endorsement stating that the Consultant's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.
- 3) Commercial Automobile Insurance
- a) The insurance shall include, but shall not be limited to, coverage for claims for bodily injury or property damage for owned, non-owned, and hired automobiles resulting from actions, failures to act, or operations of the insured, or by its employees or agents, or by anyone directly or indirectly employed by the insured. The amount of insurance coverage shall not be less than **\$2,000,000.00** per accident.
 - b) The commercial automobile insurance shall include the same endorsements required for the commercial general liability policy (see Section 16.B.2.b).
- 4) Professional Liability. The Consultant and its contractors and subcontractors shall secure and maintain in full force, during the term of this Agreement and for five years thereafter, professional liability insurance policies appropriate to the respective professions and the work to be performed as specified in this Agreement. The limits of such professional liability insurance coverage shall not be less than **\$2,000,000** per claim.
- B. In addition to any other remedy the Library may have, if Consultant fails to maintain the insurance coverage as required in this Section, the Library may obtain such insurance coverage as is not being maintained, in form and amount substantially the same as is required herein, and the Library may deduct the cost of such insurance from any amounts due or which may become due Consultant under this Agreement.
 - C. No policy required by this Agreement shall be suspended, cancelled, terminated by either party, or reduced in coverage or in limits unless Consultant has provided thirty (30) days prior written notice by certified mail, return receipt requested, to the Library.
 - D. Any deductibles or self-insured retentions in excess of \$10,000 must be declared to, and approved by, the Library.
 - E. The requirement as to types, limits, and the Library's approval of insurance coverage to be maintained by Consultant are not intended to, and shall not in any manner, limit or qualify the liabilities and obligations assumed by Consultant under the Agreement.

Attachment B - Vendor Company Information - Background and Experience

Vendor Background	
Question	Response
Vendor Identification	
Vendor Legal Name:	
Vendor Assumed or DBA Name:	
Vendor Address:	
Vendor Contact Information:	
Corporate Notes	
Ownership:	
State company ownership status <ul style="list-style-type: none"> • Business • Sole Proprietor • Partnership • Corporation • Limited Liability Corporation (LLC) • Other 	
State what city and state the company was legally formed.	
State the date the company was formed.	
Certified Partnerships:	
Identify certifications held for implementing another firm's products. Include how long the partnership or certification has been effect.	
Organization Size:	
Describe organization, including any parent companies, subsidiaries, affiliates and other related entities. <ul style="list-style-type: none"> • If a Subsidiary <ul style="list-style-type: none"> ○ # Of employees of proposing company/division ○ Identify revenues of proposing company/division 	
Vendor Experience	
Customer Base:	
# Of public sector clients.	
# Of clients that are municipalities/counties	
# Of clients served similar in size to the Library	
Terminated Projects:	

Attachment B - Vendor Company Information - Background and Experience

List any terminated projects. Please disclose the jurisdiction and explain the reason for the termination.	
Litigation:	
List any litigation that you have been involved with during the past two (2) years regarding services provided.	
Additional Narrative Response	
Describe the company in terms of size, type of services offered, and clientele served.	
Describe track record for providing services and/or deliverables similar to the Scope of Work in the Solicitation.	
Financial Information:	
State whether the company or its parent company (if any) has ever received any sanctions or is currently under investigation by any regulatory or government body.	
Communication	
Describe the communication scheme you will use to keep the County informed about services.	
What risks are associated with the project? What contingencies have been built in to mitigate those risks?	

Attachment C. Vendor Reference Form

Please provide the following information for three (3) customers of comparable size and scope as outlined in this Solicitation, particularly California public library customers that the vendor has been under Contract with during the past five (5) years, as well as any additional municipality references.

References may be called at any time during the procurement process. The Library will not notify Vendors before reference checks begin.

The Library reserves the right to check any other reference(s) that might be indicated through the explicitly specified contacts or that result from communication with other entities involved with similar projects.

If your Bid/Proposal includes a Third-Party Provider, you must also submit a separate copy of this form for each Third-Party Provider.

REFERENCE 1:

Client Name:	Phone:
Address:	
Primary Contact	Title:
Email Address:	Phone:
Service Dates:	Client Employee Count:
Summary and Scope of Services Provided:	
Client Operating Budget:	

REFERENCE 2:

Client Name:	Phone:
Address:	
Primary Contact	Title:

Attachment C. Vendor Reference Form

Email Address:	Phone:
Service Dates:	Client Employee Count:
Summary and Scope of Services Provided:	
Client Operating Budget:	

REFERENCE 3:

Client Name:	Phone:
Address:	
Primary Contact	Title:
Email Address:	Phone:
Service Dates:	Client Employee Count:
Summary and Scope of Services Provided:	
Client Operating Budget:	

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
	Security			
1	The solution will support federated identity management (Single sign on) using WS-Federation, SAML, OAUTH and/or OpenID.			
2	Library owned data, including backups, must be located, accessed, processed and stored within the United States.			
3	The following security audit documentation must be provided to the library to review: SOC II (preferred), PCI-DSS Attestation of Compliance, ISO 27001 Based Assessment, and Cloud Security.			
4	The solution must maintain a password compliance policy to secure the application for local account administration.			
5	The vendor must have written policies and procedures for the following areas: Acceptable Use, Patch and Vulnerability Management, Access Control Policy, Breach Disclosure Policy, Physical Security Controls, Back-up, Disaster Recovery Policy, Business Continuity Plan, Human Resources Policy on hiring practices, including background checks, Logging and Monitoring, and Privacy Policy.			
6	The vendor must comply with the following regulatory standards: Family Educational Rights and Privacy Act (FERPA).			
7	The solution must meet or exceed (WCAG) 2.0 A and WCAG 2.0 AA conformance standards.			
8	The solution must support role based access administration.			
9	The solution must support integrated Multifactor Authentication for local account administration.			
10	The solution must have federated identity management (Single sign on) for APIs, Web Services and mobile devices.			
11	The solution must have the ability to manage the following sensitive data classifications: Personally Identifiable Information (PII) such as Drivers License, Social Security Numbers; and Payment Card Industry (PCI-DSS).			
12	The solution must maintain PII as confidential (i.e., no data-mining).			
13	The solution must provide multitenant controls for separation of users/data within the service.			
14	The solution must secure and encrypt APIs/open interfaces.			
15	The solution must use Standards-based or open API for managing client-controlled encryption keys.			
16	The solution must support Azure AD as an identity Provider.			
17	The solution must provide application and security logs upon request.			
18	The vendor must provide the retention policy for application and security logs.			
19	The solution must perform alerting on security concerns			
20	The solution must be able to send logs to the library Security and Information Event Monitoring (SIEM) Tool.			
21	The vendor must have cyber liability insurance.			
22	The vendor must offer Investigation support in case of breach or compromise of data or users.			
23	The vendor must perform regular Penetration Testing (at least annually).			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
24	The vendor must perform application layer vulnerability scans regularly.			
25	The vendor must have intrusion prevention and detection capabilities.			
26	The vendor must use next generation antivirus/anti-malware software.			
27	The vendor must encrypt data at rest.			
28	The vendor must encrypt data in transit.			
29	The vendor must offer customer configurable data loss prevention (DLP) policies.			
30	The solution must have an administrative web interface.			
31	The solution must have a batch import interface.			
32	The solution must have usage and data tracking tools.			
33	Must have the ability to rapidly scale the SaaS solution.			
34	The solution must have the ability to send email notifications (i.e. password resets, status updates, scheduled reporting, etc.).			
35	The solution must support bulk data import and export/extraction to/from service(s).			
36	The solution must provide storage limits defined and reasonable per service, group and user.			
37	The solution must have the ability to surpass service storage limits per service, group and user.			
38	The solution must provide network connectivity between the vendor and customer through a private network.			
	ILS System Administration			
39	The solution must have role-based security that can be customized per role e.g. Circulation, Reference, Technical Services, Admin			
40	The solution must have easy to understand security without too many "layers"			
41	The solution must have ability for the sysadmin to duplicate a user account for another staff account with same role.			
42	The solution must have ability for the staff user to customize the look & feel of their GUI			
43	The solution must have security section be granular on viewing/editing/updating			
44	The solution must have a Training / testing /sandbox environment which can be a backup copy of the production database for be able to make database changes via SQL (insert/update/delete)			
45	The System Admin should have ability to run custom SQL reports using a query editor with a direct connection to the database / ODBC for complex reporting.			
	Business Requirements			
46	The library staff must be able to manage the account information of all of its patrons.			
47	The library staff must be able to cut/paste text from all screens.			
48	The library staff must be able to manage the circulation of all material in the library catalog, including but not limited to: books, serials, and online content.			
49	The library staff must be able to successfully complete the necessary steps and processes in acquiring new and used material in the catalog.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
50	The library staff must be able to successfully complete the necessary steps and processes in cataloging new and used material in the catalog.			
51	The library staff must be able to manage the circulation of all material requested in the library catalog requested through the INN-Reach ILL system (Link+), including but not limited to: books, serials, and other physical media.			
52	Library staff must be able to successfully complete the necessary steps and processes in serials including creating and managing serial records, subscriptions, prediction patterns for various enumeration and chronology, issues, serial holdings, routing lists, claims, checking in issues, and printing issue labels.			
53	The library staff must be able to generate and distribute reports for day-to-day operations, as well as executive leadership decisions.			
54	The solution should not require staff/user licensing e.g. citrix seat licensing			
	Acquisitions - Interoperability			
55	The solution will have the ability to seamlessly open/have access modules to other modules {e.g., cataloging, circulation).			
56	The solution will have the ability to export to common formats {such as .xlsx or .csv) specific fields from the following record types: order, bibliographic, invoice, vendor, and payments.			
	Acquisitions - Vendor/Vendor Accounts			
57	The solution's Acquisitions module must seamlessly interface with major vendors including Baker & Taylor, Ingram, Midwest Tape, and Brodart for selection using vendor carts, ordering, order confirmation, invoicing and receiving processes.			
58	The solution must support vendor codes of 10+ character length.			
59	The solution must support the ability to change vendor at any time.			
60	The solution must support the ability for the Library to have multiple accounts set up for a single vendor.			
61	The solution must allow the creation of an unlimited number of vendors.			
62	The solution must support the ability to track vendor performance in filling orders and providing discounts.			
63	The solution must have the ability to input discount.			
64	The solution must allow for a vendor to be setup under a deposit or prepaid account			
	Acquisitions - Budget Administration			
65	The solution must support fund codes of 10+ character length.			
66	The solution must allow the creation of an unlimited number of funds.			
67	The solution must provide the fund data fields as follows: amount, fund code, fund description, accounting reference, fiscal year, fund status i.e. open, frozen, closed.			
68	The solution must provide the ability to keep track of funds, encumbrances and expenditures as orders are created.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
69	The solution must provide the ability to organize and group various funds within the acquisitions budget hierarchy including: fiscal year, material type, fund source.			
70	The solution will have the capability of calculating and performing fund transfers from one fund to another fund			
71	The solution will have the capability of calculating and performing available fund balances transfer from one fiscal year to the next, if desired.			
72	The solution is capable of integrating with our external accounting systems to support financial reconciliation processes.			
Acquisitions - Ordering				
73	The solution must support broad flexibility to search purchase orders and invoices by: title keyword, ISBN, PO number, invoice number, PO creation date, and vendor.			
74	The solution must allow the creation of an unlimited number of purchase orders.			
75	The solution must allow user to choose whether and when to create bibliographic records when entering orders on an individual PO basis.			
76	The solution must accommodate the following types of orders: firm orders, standing orders, and continuations.			
77	The solution must provide full PO Header access with ability to control and edit PO properties such as; PO number, description, vendor, account, item level coding, item creation upon approving PO, option to barcode at receipt, and option to prepay a vendor			
78	The solution must provide PO line elements as follows: ISBN, title, author, workslip/order notes, price, quantity, branch/location, fund, collection code, item type, product ID			
79	The solution must provide templates for new orders which can be set up and updated as needed by staff, and includes the same properties as found in PO header.			
80	The solution must allow user to choose whether and when to create bibliographic records when entering orders on an individual PO basis.			
81	The solution must have the ability to populate a purchase order by using an existing bibliographic record, a purchase request by downloading an electronic file from vendor site, or manually creating a bib record.			
82	The solution must have the ability to automatically update associated information (e.g., order status, fund accounting, item circulation status) when: ordering, invoicing, receiving, cancelling, and applying credit memos.			
83	The solution must notify staff when funds are over-encumbered during the ordering process, with the ability for staff to override. Indicate fund, overage amount, and each PO line instance.			
84	The solution must provide the option to print customizable work slips, defaulting to automatically print/reprint upon receipt with an option to not print.			
85	The solution must allow EDIFACT ordering and confirmations.			
86	The solution must provide assistance in locating error(s) if problems occur during EDIFACT processing.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
87	The solution must provide a method for cancelling with automatic updating of fund accounting: titles, partial quantity ordered, and complete order.			
88	The solution must allow multiple order records to be attached to a single bibliographic record.			
89	The solution must allow order records to be displayed or suppressed from public view manually and through a batch process.			
90	The solution must allow multiple bibliographic records to be attached to a single purchase order.			
91	The solution must support retaining the following when a bibliographic record is merged: item records, acquisition information/order records, and patron holds in request date order, removing duplicates.			
92	The solution must support retaining the following when a bibliographic record is overlaid: item records, acquisition information/order records, and patron holds in request date order, removing duplicates.			
93	The solution must support the automated allowing or disallowing of patron holds based on fields such as collection codes and item status.			
94	The solution must support, at a minimum, 1000 order records linked to a single bibliographic record.			
95	The solution must support batch item delete capabilities.			
96	The solution must provide the capability to copy existing purchase order lines/records to create new purchase order lines/records.			
97	The solution must identify any orders that have not been completed.			
98	The solution must prevent assignment of duplicate purchase order numbers.			
99	The solution must provide the option to populate item records associated with a purchase order whether via an electronic file or manually.			
100	The solution must provide the ability to retain the ISBN downloaded from an electronic vendor file into the PO, regardless of the first ISBN on the associated bibliographic record.			
101	The solution must provide customizable batch editing functionality - i.e., global update to modify text in order records, branch distribution and coding etc.			
102	The solution must support locally defined workslip notes field for each purchase order line.			
103	The solution must support full customization of the appearance of printed purchase orders.			
104	The solution must provide the option for staff to remove cancelled orders from the public catalog and send notices to patrons explaining cancelled holds.			
105	The solution must provide the ability to change vendor within a PO to include full header information and automatically update corresponding vendor parameters (i.e. discounts).			
106	The solution must provide the ability for staff to undo or reverse the approval or cancellation of a purchase order line, as well as the approval of the entire PO.			
107	The solution must allow for the manual removal of a PO line.			
108	The solution must provide the ability to view associated invoices from within the PO.			
	Acquisitions - Receiving			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
109	The solution will provide the ability to display notes to staff during the receiving process {i.e. special instructions for particular titles).			
110	The solution will support EDIFACT receiving.			
111	The solution will provide the ability to switch between edit and receiving mode.			
112	The solution will automatically update the item status upon receipt.			
113	The solution will provide the ability to enter barcode when item is received.			
114	The solution will provide the ability to sort and search when receiving.			
115	The solution will provide the ability to "unreceive" items that have been marked as received.			
116	The solution will have the ability to receive from multiple POs at once.			
117	The solution will support the partial receipt of orders, allowing the library to determine which items they wish to receive.			
118	The solution will support the ability to view the history of PO line activities such as date received, date invoiced, date cancelled.			
119	The solution will support the customizable display of the following data elements within the purchase order: title, ISBN, bibliographic number, price, workslip note, quantity, status i.e. approved, ordered, received, invoiced, cancelled, on order, spent.			
120	The solution will support custom claims for items not received within certain time periods.			
121	The solution will provide the ability to batch delete items that have not been marked as received in acquisitions.			
122	The solution enables a single formatting change to be applied across all copies when printing bibliographic and/or spine labels for multiple copies of the same title.			
Acquisitions - Invoicing				
123	The solution must allow the creation of an unlimited number of invoices.			
124	The solution must allow EDIFACT invoicing.			
125	The solution must display full invoice/statement Header access with ability to control and edit invoice properties such as; invoice number, vendor, invoice date, invoice amount, extra charge categories i.e. shelf ready charges, credit memo, shipping, tax, and other.			
126	The solution must display invoice elements as follows: ISBN, title, author, price, quantity, total amount, extra charge categories, PO number			
127	The solution must allow for invoicing for encumbered items.			
128	The solution must allow for manual invoice creation, including the capability to associate the invoice with a specific purchase order PO line(s).			
129	The solution must allow for invoicing for items purchased outside the ILS such as services, databases, digital content.			
130	The solution must allow for credits to be applied to invoices with the option to prorate across the entire invoice or apply to specific PO line(s).			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
131	The solution must support, at a minimum, 1000 invoices linked to a single order record.			
132	The solution must provide the ability to undo a payment or a receipt for a line or a whole order and provide automatic adjustment to the following: order, invoice, fund, and items created.			
133	The solution must notify staff when funds are over-expended during invoicing by more than the library specified amount, with override capabilities for authorized staff.			
134	The solution must maintain history of all acquisitions activities for a time period specified by the library.			
135	The solution must support an invoice approval workflow that, once completed, automatically updates the financial records by converting the associated funds from encumbered to spent status.			
136	The solution must provide the ability to search for invoices using a variety of criteria, including: invoice number, invoice date, date range, vendor code, vendor name, invoice creation date, and invoice approval date. Supports compound searches across multiple fields and allows sorting of results by any of these parameters.			
	Acquisitions - Serials			
137	The solution supports the searching of serials by serials title and ISSN			
138	The solution supports multiple serial record types, including: Copy Record – representing each individual subscription, Issue Record – representing a single issue, Copy Issue Record – a specific issue with a status (e.g., Expected, Received, or Claimed), Item Record – a barcoded copy issue intended for circulation.			
139	The solution must provide full copy record access with ability to control and edit properties including description, location, collection code, checkin priority, format type (i.e. magazine, newspapers, microfilm, bound periodicals, microfiche), call number, status (i.e. currently received, not currently received, on order, completed, other, unknown), the ability to assign a vendor, the option to create items with or without barcodes, the option to print labels, the option to display summary of holdings, option to have a staff only view (mask from the public catalog), item type, PAC display note (minimum of 500 characters)			
140	The solution supports the prediction of upcoming issues at the serials control level in any frequency such as daily, weekly, biweekly, monthly, bimonthly, quarterly, annually, irregular			
141	The solution must provide full prediction setup with ability to control and edit properties including start and end date, exceptions to start/end dates, chronology patterns with at least 4 levels of chronology (e.g. daily, weekly, monthly, yearly, day month year, day month date year, month year, month day year, irregular, month-month year, month-month-month year, month date-date year, month year/month year, non-predictive, year season, season year, quarter, season/season year, season year/year, year/year), enumeration patterns with at least 6 levels of enumeration, continuous (if the enumeration continues or resets at a certain time), calendar change and reset, run codes (e.g. main, index, supplement), and a binding trigger.			
142	The solution supports chronology patterns including an option for entering free text chronology in special checkin.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
143	The solution supports check-in and undo of check-in of serial issues for one or multiple branches			
144	The solution can check in non-predicted issues, issues that come out of order and irregular issues			
145	The solution allows users to update the issue detail status (i.e. damaged, not coming, not available, not published, expected, or force claim).			
146	The solution supports check in of supplementary materials, including special issues, supplements, and inserts			
147	The solution supports the display of holdings summary in the PAC including location, collection, call number, notes, run duration, status			
148	The solution supports a note field for staff use that pops up prior to check in			
149	The solution allows for routing lists to be set up in each copy record and prints routing list after checkin			
150	The solution is compatible with a variety of modern printer hardware.			
151	The solution supports individual and batch printing capability, as well as reprinting labels at a later time			
152	The solution supports the following data elements to be printed on serial labels: title, branch, call number, issue date, enumeration			
153	The solution allows the deletion of copy records, item records, and issue records, with the deletion shown in the PAC in real-time.			
154	The solution allows for the purging of all records (i.e. copy record, received and expected copy issues, summary of holdings, checkin notes, claims, routing, and prediction patterns)			
155	The solution supports the ability for staff to setup claims by time or issue gap, no claim, as well as custom claim intervals at the copy record level.			
156	The solution allows options for claims to be automatically generated and for staff to manually generate claims when an expected issue has been missed			
157	The solution supports the electronic transmission of claims to a vendor as well as manually generating a claims report.			
158	The solution has reporting capabilities to run a list of all serial titles by location and by status			
	Cataloging - General			
159	The solution will support the following MARC 21 formats, without limitation on record length except as consistent with MARC standards: Bibliographic data, Holdings data, Authority data, Classification data.			
160	The solution will support RDA (Resource Description and Access), FRBR (Functional Requirements for Bibliographic 2.02) and will remain compatible with any future developing cataloging standards.			
161	The solution will support Library of Congress Subject Headings (LCSH), form/genre terms from Library-designated MARC tags (e.g., 650, 655 tags) and other non-LC thesauri such as homosaurus and bidex.			
162	The solution will allow searching and browsing including Boolean combinations in the following fields: title (240/245/246), creator (1XX/7XX), subject/genre (6XX), series (8XX), standard identifier number (01X, 02X), bibliographic number (001), unique bibliographic record identifier, and call number.			
163	The solution will support free-floating subdivision authentication and pattern subdivision methodology.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
164	The solution will provide the ability to batch edit bibliographic, item and authority records and have these changes reflected in real time.			
165	The solution will provide the ability to do large batch bib and item record changes, both within the solution and via exporting, editing, and reimport.			
166	The solution will provide real-time indexing and display of new/updated/deleted bibliographic records, new/updated/deleted item records, new/updated/deleted authority records.			
167	The solution will support full screen editing for bibliographic, item and authority records.			
168	The solution will provide the ability to import a batch of MARC records from OCLC Connexion.			
169	The solution will provide customizable batch editing functionality for bibliographic records, item records, and authority records.			
170	The solution will support the local, manual creation of bibliographic, item and authority records.			
171	The solution will provide the capability to copy existing bibliographic and item records to create new records.			
172	The solution will provide the ability to use shortcut and hot keys for repetitive tasks and applying macros			
173	The solution will provide cataloging security (levels of authorization).			
174	The solution will enable the assignment of editing permission levels, e.g., the ability to edit bibliographic records and/or authority records, on a per user basis. Or, if not per user, allows for creation of user groups with various levels of editing permission (ex. public services staff vs. acq staff vs. cataloging staff)			
175	The solution will allow for the suppression (both in batches and individually) of bibliographic and item records, making them invisible in the public catalog but still visible to staff and available for editing.			
176	The solution will provide the ability to support UTF-8 Character sets.			
177	The solution must provide the ability to transfer title-level holds from one bib record to another bib record			
178	The solution will allow for multiple bibliographic, item, authority records to be open simultaneously.			
179	The solution will allow for bib and authority records to have admin-designated statuses such as In-Process, In Review			
180	The solution will allow for the ability to use standard Windows commands (CTRL-V, CTRL-X, CTRL-P etc.) to edit bibliographic, item, and authority records			
181	The solution will have the ability to validate MARC bibliographic and authority records for invalid codes, formatting and duplicate fields and subfields (where non repeatable)			
182	The solution will allow for multiple search/browse windows to be open simultaneously.			
183	The solution will maintain and display the following information for bibliographic, item, and authority records: create date (and user responsible) and latest edit date (and user responsible).			
184	The solution will track historical changes made to bibliographic, item, and authority records and provide a mechanism for displaying this information.			
185	The solution will have the ability to either open individual item records when searching by barcode, or to open item list with specific barcode highlighted.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
Cataloging - Bibliographic Records				
185	The solution will assign a unique bibliographic identifier to each bibliographic record that is visible to staff and searchable, will preserve existing bib numbers with ILS migration and start numbering for new records post-migration with (last bib number)+1			
186	The solution will support the import, export, updating, retrieval and indexing of the following MARC 21 formats: fixed fields, variable fields, subfields, tags, and indicators.			
187	The solution will have the ability to batch import, export, and delete bibliographic records, and allow setting of import status including customizable match points			
188	The solution will check MARC fields designated by the library to identify and flag duplicate bibliographic records when loaded through a batch process or when created manually.			
189	The solution will provide the ability to overlay bibliographic records when importing records, with optional user-selected elements preserved during overlay			
190	The solution will have the ability to include item information in specified MARC fields when exporting MARC record files.			
191	The solution will support the ability to merge bibliographic records, combining all title level holds in order of request date, with any duplicate patron holds being removed. The merge function will include the ability to preserve/protect user or admin-selected fields in merged record.			
192	The solution will support retaining the following when a bibliographic record is merged or overlaid: item records, acquisition information, and patron holds in request order with duplicates removed.			
193	The solution will allow for the use of GMDs (245 \$h).			
194	The solution will provide assisted entry of MARC-8 diacritics and special characters.			
195	The solution will provide the ability to locate empty/null fields for bibliographic records.			
196	The solution will provide an integrated process to delete the associated OCLC holdings when the last item record for a particular consorial library system is deleted in the local system.			
197	The solution will automatically suppress (make invisible in public catalog) bib records when last item is deleted, but retain bib record.			
198	The solution will have the ability to copy and paste tags from one bibliographic record to another.			
199	The solution will allow for locally-defined free text notes field(s), with options for publically-viewable and staff-only fields.			
200	The solution will either allow only one user to edit a bib, item or authority record at a time, or will allow multiple users to edit a record at the same time but with a disclaimer and provide the name of other user(s) are editing the same record			
201	The solution will have the ability to view but not edit cataloging record depending on use level.			
202	The solution will provide a link checker for bibliographic records.			
203	The solution will have spellchecker.			
Cataloging - Item Records				

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
204	The solution will support holdings statements of multi-part items as defined in ANSI/NISO 239.71 Holdings Statements for Bibliographic Items, including: summary and detailed holdings, and mixed level holdings.			
205	The solution will provide the ability to move one or more specific item record(s) from one bibliographic record to another, while maintaining all item-level circulation information such as holds, fines, etc.			
206	The solution will provide the ability to create item records with, at a minimum, the following fields: barcode number, branch, item type, location, collection code, call number, copy field, volume statement, price, item status, checkin note, internal note, item-specific note, and staff-only option.			
207	The solution will support the ability to delete item records one at a time and by batch, including the ability to delete a portion of items that were ordered together on the same PO.			
208	The solution will display the following information in an item record: Title, Author, call number, branch, ISBN, bibliographic record identifier, shelving location, publication date, status, type (i.e., format), last modification date, price, circulation history (year-to-date count, total, or cumulative count), in-house use count, date created, and current borrower.			
209	The solution will provide the ability to perform batch item creation, including via import of MARC records with new item information attached.			
210	The solution will allow for batch item changes, including via MARC import/overlay.			
211	The solution will only allow authorized users (ex. Cataloging staff) to edit specific, system-defined item record fields (ex. call # field).			
212	The solution supports staff selecting multiple items from the copies list and placing item-specific requests in bulk.			
213	The solution will allow staff to change the barcode or elements within an item record without loss of other elements/history such as holds, circulation data, and acquisitions information.			
214	The solution will block multiple items from using the same barcode and alert users when non-unique barcodes are attempted			
215	The solution will support, at a minimum, 1000 item records linked to a single bibliographic record.			
216	The solution will allow scanning of the ISBN/UPC/other identifying barcodes of an item.			
	Cataloging - Authority Records			
217	The solution will provide authority control for names, titles, subjects, genres, and series.			
218	The solution will provide the ability to merge two or more authority records.			
219	The solution will provide the ability to see and manipulate blind references.			
220	The solution will provide for batch load and batch delete capabilities for the import of new and updated authority records and the removal of deleted authority records.			
221	The solution will provide the ability to make global changes to authorized headings and subfields, both through loads or manually.			
222	The solution will provide the ability to use locally defined subject headings without interference from Authority Control (have AC ignore local 69X and 79X tags) or to create locally defined AC records.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
223	The solution will provide the ability to keep unattached Authority records (not attached to a bibliographic record) in order to retain cross-references to broader or narrower terms.			
224	The solution will display an authority's individual record number			
225	The solution will display the number of bibliographic records attached to an authority record, creation date of authority record, and last updated date of authority record			
226	The solution will have the ability to open all bibliographic records attached to a specific authority record			
227	The solution will allow system-generated name authorities to be configured to be multi-use or author-only.			
	Cataloging - Other			
228	The solution will provide the ability to export records in standard MARC format.			
229	The solution will support a print screen function.			
230	The solution will support custom formatting for bib label and spine label printing.			
231	The solution will be compatible with a variety of modern printer hardware.			
232	The solution's search and browse results screens will be customizable, allowing for sort/filter options (including by location) and various display fields (such as item type, last CKO date, call number, etc.)			
233	The solution will support the creation and maintenance of user-specific and system-wide macros within cataloging.			
234	The solution will provide an export feature compatible with Word/Excel for spine labels.			
235	The solution will allow creation of data integrity reports (such as duplicate ISBN and duplicate Control number).			
236	The solution will provide the ability to generate the following reports: new or duplicate headings from loaded bibliographic records, Headings used for FIRST Time, INVALID headings used, BLIND References, and duplicate authority RECORDS.			
237	The solution will reflect changed/added/deleted bibliographic, item, and authority records to the PAC in real time.			
238	The solution will provide the ability to run incremental MARCOUTs that include adds, updates, and deletes for all libraries.			
239	The solution must support the use of both Codabar and Code 39 barcodes for material with the ability to interpret up to fourteen digits.			
	Circulation			
240	The solution will provide the ability for patrons to choose whether or not to keep their checkout history.			
241	The solution will provide the ability to create limits based on item status (i.e., only returned, checked in items).			
242	The solution must support the use of both Codabar and Code 39 barcodes for patron IDs with the ability to interpret up to fourteen digits.			
243	The solution will provide Patrons with the ability to change pickup location after hold has been placed.			
244	The solution will provide Patrons with the ability to limit search results by reading level or age.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
245	The solution will provide the ability for patrons to reset/change their own passcode (i.e., enter email and send new temporary password to them).			
246	The solution will provide self-service new patron/card creation.			
247	The solution will provide the utility for 2 name fields that include both the legal and preferred names. Both name fiels must be searchable.			
248	The solution will provide a handheld or mobile circulation and patron support solution (including support for RFID security checkouts).			
249	The solution will provide the ability to adjust format of holds slips, such as varied font sizes.			
250	the solution will provide the ability to custom format the hold/ transit slip and cko receipt by the system admin e.g cko receipt is font size 12, hold slip font size 16 and prints accordingly			
251	The solution will provide the ability for non--admin staff to manage receipt message.			
252	The solution will provide ability to have default text on CKO receipt for all locations and also have ability to override for 1 specific location. e.g during renovation			
253	Once items are set to claimed returned, the solution should eventually age to lost and then charge the patron for these items if they are never found.			
254	The solution will provide the ability to interrupt request chain (i.e., if a highly requested item is returned, have the option to change status to send for repair instead of filling next hold).			
255	The solution will provide the ability to add multiple paragraph comments to borrower records and show all of the message in patron interface.			
256	The solution will provide the ability to automatically cross- reference new customer accounts against existing/duplicate accounts.			
257	The solution can be customized as to what constitutes a duplicate borrower record.			
258	The solution will tag blocks, notes, account creation, CKO, CKI, and other activities with staff member name and date information automatically.			
259	The solution will provide the ability to setup a pickup location that is not a library and ability for one library to have multiple pick-up options (i.e. Biblioboxes outside library, etc.).			
260	The solution will provide a functional check in notes (appear before the cki process happens and then give option whether or not to proceed).			
261	The solution will provide more auditing and documentation when viewing blocks and notes on patron's record.			
262	The solution will provide the ability when doing pull list to mark item as missing and then notify the patron of the problem automatically if it's the last available copy (or if item specific request).			
263	The solution will provide a unified patron search field in checkout (e.g., Ability to type in patron name, email, phone number or barcode, borrower number to find patron).			
264	The solution will provide the borrower phone number to be formatted e.g. (888) 888-8888 but saved internally just numerically			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
265	The solution will provide the ability to see last two patrons (name and barcode) to have borrowed an item (even after item has been checked in).			
266	The solution will provide the ability for ILS to auto change status (such as age an item from "new" status to "normal" collection/status).			
267	The solution will provide the ability to go straight from borrower record to relevant item record and vice versa.			
268	The solution will provide the ability to email cko receipts to patrons.			
269	The solution will automatically update borrower age stats based on birth date (i.e., automatically change bstats from juvenile to adult).			
270	The solution will automatically waive all fees when a juvenile turns 18			
271	The solution will automatically change borrower type of youth (under 13) to a teen (13+) to adult (18+)			
272	The solution will provide the ability to copy and paste within the ILS even when field isn't editable (i.e., copy an item barcode from one screen and paste it into another screen).			
273	The solution will allow migration of duplicate accounts with lost items, fines and fees reconciling- activities across two accounts for the same patron.			
274	The solution will provide the ability to delete a library's item with fines/transactions attached. Can the fines be kept, including the title/barcode information, on the patron's record even after the item has been deleted?			
275	The solution will support the ability to deny Patron holds on items if debt/fines threshold is over \$100.00.			
276	The solution will provide the ability to create floating collections and choose which libraries participate in the floating collections.			
277	The solution will provide the ability to return an item at another library, placing the item 'in transit' for the owning library (and not lose the patron ID and name of the patron who had the item last).			
278	The solution will provide the ability to easily update all patron records, even those not registered at home library.			
279	The solution will provide the ability to pay patron fees, even those not incurred at home institution.			
280	The solution will provide the ability to choose pickup location for holds.			
281	The solution will provide the ability to make specific items unavailable for hold requests (via something like an itype and via status if missing, etc.).			
282	The solution will provide different cki modes (book drop, normal, in-house, lost, damaged).			
283	The solution will provide the ability to assign the equivalent of borrower types and borrower statistics to patrons Fast Add option.			
284	The solution will provide the ability to add notes including ILL notes.			
285	The solution will provide the ability to look at comment history, particularly for ILL.			
286	The solution will provide the ability to have multiple item types.			
287	The solution will provide the ability to manually change due date.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
288	The solution will provide the ability to create custom reports.			
289	The solution will provide the ability to renew items, place holds, and cancel holds.			
290	The solution will provide customizable auto-renew options			
291	The solution will provide the ability for homebound functionality (books by mail, etc.).			
292	The solution will provide the ability to place item level holds and bib level holds.			
293	The solution will provide the ability to create manual fees.			
294	The solution will provide different levels of access for supervisors, normal staff, etc.			
295	The solution will provide the ability to mark items "claims returned".			
296	The solution will provide an automated way to age patrons to inactive status if haven't checked out or used computers or electronic resources recently.			
297	The solution will provide the ability to limit to specific library and branch's database (for searching, placing holds).			
298	The solution will provide the ability to separate overdue, lost notice schedule for each library (i.e., wait 6 months for ILL instead of 3, etc.).			
299	The solution will support custom loan periods for types of items based on combinations of factors such as: material type, number of holds on bibliographic record, specific library, patron type, and patron status.			
300	The solution will provide an offline Circulation module that uploads circ info once main system is back online.			
301	The solution will provide the ability to use Self Check machines when in Offline Circulation module, then info updated via SIP2 connection.			
302	The solution will provide auditing of waiver/payment notes by staff.			
303	The solution will utilize API communication -or current popular information sharing coding to communicate with 3rd party vendors that are not SIP or ESIP protocol based.			
304	The solution will provide the ability to set items to 'damaged' from customer record that charges for item and shows as block instead of relying on 'lost'.			
305	The solution will provide multiple search options for borrowers (address, phone #, etc.).			
306	The solution will provide the ability to quickly change status of items.			
307	The solution will support the priority of filling holds if- multiple items available, trigger hold for item location that is the same as pickup location.			
308	The solution will support priority based holds for consortia such that an holds is filled first by pickup location, then library system and finally by all consortia locations.			
309	The solution will separate loan periods, closed dates, charge and renewal limits for each library and branch of each library.			
310	The solution will provide the ability to look at item record and see who owes fees for them.			
311	The solution will provide the ability to look at item record and see which patrons has item on hold shelf.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
312	The solution will provide an interlibrary loan module that allows easy searching and placing ILL holds in non--Horizon library databases.			
313	The solution will provide the ability to do a compound search for borrowers by multiple criteria (birth date+ address, etc.).			
314	The solution will provide the ability for system to notify staff if borrower's address, phone, and/or email or not in the correct format.			
315	The solution will provide the ability to override copy specific holds and change them to bib level holds.			
316	The solution will provide the ability to apply payment on fines before overdue item is checked in.			
317	The solution will provide the ability to remember last barcode entered in checkout screen.			
318	The solution will provide the ability to show blocks in chronological order.			
319	The solution will provide the ability to enable sorting of block by type.			
320	The solution will provide the ability to create temporary cards that expire after a certain time.			
321	The solution will provide the ability to see checkout history (annual and cumulative) of each item in individual library database (if patron can choose whether or not to keep history).			
322	The solution will support the Patrons need to be able to use same barcode format (14- digits) as library currently uses, but also need to be able to have barcodes of any number of alphanumeric characters and without an algorithm.			
323	The solution will provide the ability to access item record directly from patron record transaction (checkouts, holds, etc.) lists.			
324	The solution will allow the library to determine which receipts (items discharged, list of all checkouts, pending holds, overdues, fines, and fees) are available and how those receipts will be produced (print, email, text message).			
325	The solution will support "family" or linked card features to allow the Library to indicate a relationship between patron records (whether family, caretaker, responsible party, or "approved user").			
326	The solution will provide the option for the Library to disallow holds for items that are "on shelf" or "available" status.			
327	The solution will allow designated staff to change the position of a patron in a holds queue.			
328	The solution will provide the ability to automatically send a notice to patrons prior to the expiration date of the patron card.			
329	The solution will provide the ability to automatically send a notice to patrons prior to the deletion of the patron record due to inactivity.			
330	The solution will provide the following notification methods (determined by patron preference with library override): phone, email, and text.			
331	The solution will provide the ability for a patron to select any , multiple or no methods of notification for Notices e.g. if patron wants to be notified both by SMS and Email			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
332	The solution will provide the ability to generate hold, overdue, billing and preoverdue notices via Email, SMS, or Phone			
333	The solution will provide a backup notice method should the primary method fail e.g.if email fails, send SMS			
334	The solution will automatically stop sending email notices to a patron once an email has been bounced back.			
335	The solution should provide Notice failure reports with failure reason.			
336	The solution will support keeping a history (for a locally controllable period of time) in the patron record of sent notifications, identifying item, notice type, date, notification method.			
337	The solution will integrate circulation statistics from library's e- book and e-audiobook providers, library's discovery layer, and other third-party vendors into report tool.			
338	The solution will track "in house" usage.			
339	The solution will maintain "in house" usage in each item record.			
340	The solution will support the following image files as attachments to patron records: jpg, tif, and png.			
341	The solution will allow designated staff to override set system limits and blocks, in order to: check out, renew, place holds, and other circulation functions.			
342	The solution will provide the option to display and print the following information when accessing the patron record: all patron registration information, a summary list of the patron's current transaction activity, a complete list of all items currently out to the patron, an indication of any item that is overdue, a complete list of items claimed and lost, a list sortable by any field of all holds, a complete list of all outstanding charges and any credits, a summary list of all prior charges, fines, payments and credits an indication of any blocks on patron account, and a history of all blocks against the patron account.			
343	The solution will provide the ability to search patron records with the following data fields either singly or in combination (i.e., limiting initial search by a second factor): patron barcode, last name, first name, address elements, phone number, email address, zip code, date of birth, patron guardian/guarantor, patron homeroom, significant digits of the patron barcode, patron record number, and barcode for item(s) currently checked out.			
344	The solution will support the following for patron records: manual entry, manual update, and manual deletion (by designated users).			
345	The solution will support the validation of the format of data entered into specific fields in the patron record, including: email address and phone number.			
346	The solution will support multiple instances of the following for patron records: addresses, emails, and phone numbers.			
347	The solution will allow for the creation of custom fields in patron records and use of the information in reporting, including: fields for language, "opt-in" choice for program/marketing materials, and "opt-in" for mailing lists.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
348	The solution will support merging duplicate patron records, while preserving: holds, fines, notifications, and borrowing activity.			
349	The solution will allow the library to specify their own rules for when blocks are placed on patron records, using different limits for different patron types, including: amount of money owed, number of claims returned, number of check outs for a specific type of item, number of overdues, number of lost items, days an item is overdue, and total number of checkouts.			
350	The solution will provide the ability to search for materials records (bibliographical/bib records) and: see detailed description of item (author, publication date, description), see all copies in the system and current status, and get detailed status of each copy (current and one past borrower, number of checkouts, cost, type, attached notes).			
351	The solution must maintain Student OneCard access functionality for academic accounts.			
352	The solution will update data points shared across modules (i.e. account holder last name updated on patron module will be updated in staff modules).			
353	The solution will have the ability to link multiple library card types to one account holder (i.e. account holder has a personal card, as well as a teacher card).			
354	The solution will provide a code to identify library card types on a patron record.			
355	The solution will have ID scanning/auto-fill functionality for proof of residency and account creation.			
356	The solution will have the ability to display cover art images in all views where staff access.			
357	The solution will have the ability to configure a Stock Rotation route for a collection			
358	The solution will have ability to load Previous borrower record without doing a full search again			
359	The solution will have ability to search for items and allow for bulk edit by reference librarians/admin aka Item Group Editor			
360	Solution to have ability to add locations, BTYPES, ITYPES into a corresponding group AND be able to add that group into another group e.g. Group A is a member of Group B			
361	The solution must provide ability to bulk import Patron records based on a CSV file with key fields (Student accounts)			
362	Hold notice generation is seamless and doesn't require manual intervention to generate and can run multiple times a day.			
363	The solution should keep a transaction log of changes regarding patron account changes, item changes with key information e.g. staff username, date/time			
364	The solution should allow ability for certain fields to be only editable by Tech Services/ System Admin e.g. Call Number field should not be allowed to be modified by public services.			
365	The solution would have the ability to revert an accidental / wrong transaction by public services staff e.g. applying a payment to a borrower account which should have been a waiver, or to edit an amount that was entered wrong.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
366	The solution should have a ability to create custom fields e.g. "HOLD ID" in the Patron account which stores the First 4 characters of the LASTNAME followed by a hyphen and the Last 4 characters of BARCODE e.g. MOUR - 1234. Should not be editable and to be used in Hold Slips. If Last name changes, so should HOLD ID			
367	The solution should have ability to preserve check-in notes when adding more check in notes			
368	The solution will have the ability to do inventory within the system			
Online Public Catalog - Landing Page				
369	The solution will support the ability to add links (in catalog) to sites for common items like locations, resources, library card signup.			
370	The solution will allow for lists of bestsellers and award winners.			
371	The solution will allow for events integration with catalog: events are searchable and can be refined by location, audience, event type, language, tags; customers can register for events; and events system can integrate with a room reservation system.			
372	The solution will provide a banner area to have messages for customers like weather/holiday closures, special events.			
Online Public Catalog - Search Box				
373	The solution will support search catalog/filter results by: keyword, title, author, subject, series, genre, call number, location, language, collection, audience, reading level, publish date, format, ISBN/UPC, and topic.			
Online Public Catalog - Search Results Page				
374	The solution will provide the ability to view location availability for titles.			
375	The solution will allow patrons to search branch location only first with the possibility to broaden search after			
376	The solution will provide a system for accepting and managing "suggest for purchase" requests.			
377	The solution will enable links to digital titles that take customers to vendor website to checkout.			
378	The solution will integrate checkout from within the catalog for OverDrive, Hoopla, others.			
379	The solution will display options after a failed search including: did you mean options if viable (for typos, close titles), and text explaining other options for missing titles then: link to Suggest a Purchase or link to InterLibrary Loan.			
Online Public Catalog - Item Detail Page				
380	The solution will display cover image for title, Description, availability information, Button to allow placing hold for physical items and electronic items that are holdable, Button will allow borrowing for digital items that can be borrowed immediately.			
381	The solution will provide series information, sort items in series by first in series to last in series. Also, recommend series like this one.			
382	The solution will provide professional reviews.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
Online Public Catalog - My Items				
383	The solution will provide the following hold functionality: customers can place a hold and select pickup location, customers can cancel a hold, customers can change pickup location, and customers can suspend/unsuspend holds.			
384	The solution will allow customers to see checked out items.			
385	Solution will allow customers to see checked out digital items.			
386	The solution will allow customers to renew items.			
387	The solution will allow customers to pay fines within the catalog.			
388	The solution will provide a link (in catalog) for paying fees on an external site.			
389	The solution will enable customers to enable/disable and view borrowing history.			
Online Public Catalog - My Account				
390	The solution will allow customers to view/and or change personal information: PIN (view/change), email (view/change), default pickup location (view/change), phone number (view/change), address (view only), and card number (view only).			
Online Public Catalog - Patron Tools - Lists				
391	The solution will integrate with the BiblioCore catalog by BiblioCommons.			
392	The solution will allow customers to create and interact with content by: rating titles, creating lists and writing reviews, accessing staff made lists (online passive reader's advisory), adding to and organizing shelves (For later, Completed, Currently reading), and choosing privacy levels for above interactions.			
393	The solution will provide ability to create an eCard (digital library card) for patron and prevent duplicates via email check			
Online Public Catalog - Mobile App				
394	The solution will have a mobile app with the following functionality: enables catalog searching and refining of results, enable viewing all checked out items, enables renewing items, enables all hold management functions, enables searching/registering for events, can include information about locations, can save customer barcode, and can save barcodes for multiple customers.			
Resource Sharing / Link+				
395	The solution will support the following: ISO ILL Protocol standards, ISO 10160, and 10161-1.			
396	The solution will be ISO-compliant ILL Protocol Machine application interacts with the other components of the library system, particularly circulation and finance applications.			
397	The solution will support server and client interfaces under Z39.50.			
398	The solution will communicate directly with lending and borrowing functions of California's INN-Reach system called LINK+ and other ILL options.			
399	The solution will provide native/full integration for resource sharing lending and borrowing via LINK+			
400	The solution will provide native API integration for LINK+			
401	The solution will have the option to connect to an RSB via NCIP to allow LINK+ lending and borrowing			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
402	The solution will display LINK+ circulation activity in real time			
403	The solution will integrate with the OPAC, currently BiblioCommons, to facilitate patrons seeing their LINK+ checkouts, manage renewals, cancel holds, change pickup location and so on			
404	The solution will provide the ability to make a LINK+ item not renewable.			
405	The solution will provide the ability to send customized e-mails to LINK+ patrons.			
406	The solution will provide the ability to add fees to patron accounts for LINK+ activity.			
407	The solution will provide reports on LINK+ activity including in transit too long, requested too long, paged too long, institutional overdues, returned too long, received too long, and borrowed			
	Analytics			
408	The solution will allow designated staff to create reports.			
409	The solution will allow designated staff to manipulate the output of reports.			
410	The solution will provide the ability to save reports in order to: run at will, and schedule to run automatically.			
411	The solution will provide the ability to sort by columns/fields reported on			
412	The solution will provide the ability to sort reports by all patron fields.			
413	The solution will support creation of custom searches based on MARC.			
414	The solution will provide a flexible report generator which allows designated users to query the database by combinations of user-selected fields and criteria.			
415	The solution will provide a flexible report generator which does not require any specialized SQL (etc.) or programming experience.			
416	The solution will have complex reporting capabilities, with SQL, ODBC, or equivalent access into the database via external report writers to produce more complicated reports.			
417	The solution will provide a customizable layout for all reports.			
418	The solution will provide a customizable appearance for all reports. i.e. can be sorted by modified date, or report creator			
419	The solution will provide multiple methods for exporting reports, including: saving as a delimited file, and exporting to common formats (e.g. csv, pdf, xml, html, docx, and xlsx).			
420	The solution will provide a method for automating the creation of: regular daily reports, regular weekly reports, and regular monthly reports.			
421	The solution will provide a method for automating the delivery of: regular daily reports, regular weekly reports, and regular monthly reports.			
422	The solution will provide a number of canned reports which are available when using relevant functions of the system, (e.g., circulation or acquisitions).			
423	The solution will use stable patron key or patron record numbers, not changeable barcode numbers, in reports.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
424	The solution will integrate data from third party sources (see interoperability table) into report tool, including: products built on PowerBI (such as Savannah from OrangeBoy) and Tableau, e- book providers, e-audiobook providers, and other third-party vendors.			
425	The solution will contain an integrated collection analysis tools/components.			
426	The solution will instantly run reports and queries of the entire database with no perceived lag.			
427	The solution will provide a method for reporting on bibliographic records based on the circulating potential and location codes of attached item records (i.e., list bib records that have only one circulating copy left and sort by library location).			
428	The solution to provide a pretty director's dashboard			
429	The solution will allow staff to "subscribe" scheduled reports delivered by email.			
	Financial Reporting			
429	The solution will allow designated staff to manipulate the output of reports.			
430	The solution will provide a Budgetary Hierarchy report per Fiscal Year			
431	The solution will integrate data from third party sources (see interoperability table) into report tool, including: products built on PowerBI (such as Savannah from OrangeBoy) and Tableau, e- book providers, e-audiobook providers, and other third-party vendors.			
432	The solution will contain an integrated collection analysis tools/components.			
433	The solution will instantly run reports and queries of the entire database with no perceived lag.			
434	The solution will provide an integration with PeopleSoft and Simpler Systems.			
	Common Reports - Statistics			
435	The solution will provide a report for the number of library cards created by location.			
436	The solution will provide a report for the number of library cards created by patron type.			
437	The solution will provide a report for the number of library cards created by patron age (youth, teen, adult).			
438	The solution will provide a report for items circulated by month for particular location(s) and/or system-wide (like collection code).			
439	The solution will provide statistical reporting on checkin totals, checkout totals, circulation by btype/collection/itype/stock rotation group			
440	The solution will provide statistical reporting on number of borrowers by bstat/btype, number of items by collection/call#/itype/stock rotation group			
441	The solution will provide a report for the number of electronic items circulated per month (integrate with e-book and other electronic resource providers).			
442	The solution will provide a report for the holds from date/time placed to date/time "on holdshelf" or "ready for pickup".			
443	The solution will provide a report for the patron account activity - i.e. changes to account by staff and by patron (address, phone, etc.).			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
444	The solution will provide a report for the number of holds placed by staff per branch and sorted by date and pickup location.			
445	The solution will provide a report for the number of holds placed by patrons (both at library and on their own devices) sorted by date and pickup location.			
446	The solution will provide a report for the terminal activity by staff computer and self-checks.			
447	The solution will provide various reports for items with specific statuses, e.g. "trace" or "lost" - often include another factor such as owning location.			
448	The solution will provide a report for real-time accounting and budget views and staff generated notes.			
449	The solution will provide a report for broken links via link resolver from all bibliographic and item records containing a URL.			
450	The solution will provide a report for interoperability with third-party accounting systems such as Munis Power BI and Simpler Systems.			
451	The solution will provide a report for on-the-fly or incomplete bibliographic records.			
	Common Reports - Acquisitions			
455	The solution will provide a report for viewing the budgets in a hierarchy format by fund with total budget amounts, including on-order, spent, available, and unspent amounts.			
456	The solution will provide a report for viewing the budget summary with total budget amounts, including on-order, spent, available, and unspent amounts.			
457	The solution will provide a report for locating titles by budget to review a list of titles that are charged to a certain budget with the on-order and spent amounts for each title, as well as the on-order and spent amounts for the budget as a whole.			
458	The solution will provide a report for a compound purchase order search including PO number, PO description, vendor code, vendor name, location, PO creation date (including date range limiters), PO last updated date, PO completion date, with ability to sort results by all fields.			
459	The solution will provide a report for a compound purchase order line search including PO line title keyword, PO line title ISBN, PO line title ISSN, PO line number, vendor code, vendor name, with ability to sort results by all fields.			
460	The solution will provide a report for items by location code and item type.			
461	The solution will provide a report for purchase orders with items not yet received.			
462	The solution will provide a report for orders filtered by status, vendor, order date, fund, invoice number, subject, requester, etc.			
463	The solution will provide a report for outstanding orders, expenditures, and encumbrances by vendor.			
464	The solution will provide a report of orders by vendor, date, fund, and status.			
465	The solution will provide a report for fund overview including fund allocation, spending, available balance, and fiscal year data.			
466	The solution will provide a report for purchase order status grouped by status or timeframe.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
467	The solution will provide a report for vendor comparisons, a breakdown of vendor activity by account number for performance comparison.			
468	The solution will provide a report for vendor performance, detailed vendor data including titles ordered/received/cancelled, discounts, fill rates, and delivery times.			
469	The solution will provide a report for order fulfillment, items received status for specific purchase orders.			
470	The solution will provide a report for monthly items added/items deleted reports.			
471				
472	The solution will provide a report for items that have not circulated since a particular date at a specific location.			
473	The solution will provide a report for items that have circulated for a specific number of times at a specific location.			
474	The solution will provide a report for items that were added before or after a particular date at a specific location.			
475	The solution will provide a report for shelf-list items at a particular location.			
476	The solution will provide a report for bibliographic records that do not have current orders or for which all items are in statuses unavailable for hold requests (lost, trace, etc.) but have holds attached to them.			
477	The solution will provide a report for bibliographic records with holds that exceed a certain number, report should include item to holds ratios.			
478	The solution will provide a report for circulation data by location and location code and collection code.			
479	The solution will provide a report for material (per item type) purchased for a specific location for a specific date or set of dates, from a specific fund or across multiple funds.			
480	The solution will provide a report for missing series items for collection development.			
481	The solution will provide a report for notification if a hold with available copies is not filled in a specified time.			
482	The solution will provide a report for purchase alert for bibliographic records with holds that exceed a library-determined item to holds ratio.			
483	The solution will provide a report for items attached to bibliographic records with specific publication/copyright dates (i.e. MARC 260c).			
484	The solution will provide a report for most circulated title by location or system-wide.			
	Common Reports - Circulation			
485	The solution will provide a report for auditable daily cash summary by location at end of business to close out register.			
486	The solution will provide a report for patron information within a specific geographic area, i.e. by address or zip code.			
487	The solution will provide a report for items "in transit" to owning location for longer than specified date range.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
488	The solution will provide a sortable and customizable report for holds pull list and also by branch location			
489	The solution will provide a sortable and customizable report for Expired and/or Cancelled Lists			
490	The solution will provide a report for clear holdshelf report by date and location sorted by patron name.			
491	The solution will provide a report for number of holds by date and location, requested and filled for specified item types.			
492	The solution will provide a report for holds attached to available items that have had no movement in library-determined number of days, sorted by location of item.			
493	The solution will provide a report for items borrowed.			
494	The solution will provide a report for items sent to fill requests at other libraries.			
495	The solution will provide a report for items overdue by patrons.			
496	The solution will provide a report on library, et al. items overdue from borrowing libraries.			
497	The solution will provide the option for automatic reports(subscriptions).			
	Commons Reports - Cataloging			
498	The solution will provide a report for duplicate bibliographic records by standard numbers, including but not limited to: OCLC accession number, ISBN, ISSN, LCCN.			
499	The solution will provide a report for duplicate authority records for series, objects and authors.			
500	The solution will provide a report for bibliographic and authority records added, edited, suppressed and deleted.			
501	The solution will provide a report for item records added, edited, suppressed, and deleted.			
502	The solution will provide a report for global item and MARC updates.			
503	The solution will provide a report for unique full MARC records.			
504	The solution will provide a report for newly cataloged materials.			
505	The solution will provide a report for incorrect tags in the MARC record from bibliographic and authority control tables.			
506	The solution will provide a report for bibliographic records that have been automatically suppressed because they no longer have circulating items or valid orders associated with them, sorted by OCLC number.			
507	The solution will provide a report for activity by staff member ID.			
	Support Services			
508	Support services must be available 24/7/365			
509	The library shall be able to request service using a toll-free 800 number and online support portal.			
510	The service agreement must include remote maintenance for expert technical consultation and software support.			
511	Software warranty: Software patches and service pack releases must be supplied.			
	Migration - Data Conversion			
511	The Horizon ILS data will need to be migrated from the current solution to the new solution.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
512	Customer/Account Data			
513	library Staff Accounts			
514	Collection/Material Data			
515	Circulation Business Logic			
516	Location (Branch) Data			
517	Acquisitions Purchasing and Budget Data			
518	The vendor will identify and execute any ILS data translation required for new solution.			
	Migration - Training/Documentation			
519	The vendor will provide Administrator training.			
520	The vendor will provide Acquisition and Cataloging training to internal librarians.			
521	The vendor will provide training on analytics and report creation.			
522	The vendor will provide training to library staff for general circulation responsibilities.			
	Scalability			
523	The Solution must be able to support 500+ users, with the ability to add more users in the future.			
524	The Solution must be able to add more functionality as needed.			
	Interfaces			
525	The Solution must interface with BiblioCommons.			
526	The Solution must interface with Bibliotheca Self-Checkout System.			
527	The Solution must interface with TechLogic Automated Materials Handling (Lyngsoe).			
528	The Solution must interface with Laptops Anytime Laptop Dispensers.			
529	The Solution must interface with Comprise SmartPay Online Fee Payment.			
530	The Solution must interface with Comprise SmartMoneyManager Point of Sale.			
531	The Solution must interface with OCLC Connexion.			
532	The Solution must interface with Todays Business Solutions public print management.			
533	The Solution must interface with Today's Business Solutions MyPC reservations.			
534	The Solution must interface with CollectionHQ.			
535	The Solution must interface with Unique Management's Message Bee.			
536	The Solution must interface with third-party downloadable digital content providers (i.e. OverDrive, Hoopla, etc.).			
537	The Solution must interface with Unique's MessageBEE product			
538	The Solution will provide integration with PeopleSoft and Simpler System for Financial Reporting			
	Data Retention, Archival and Purge			
539	The Solution must provide Storage Management Capabilities			
540	Documented high-availability and disaster-recovery capabilities and procedures.			
541	Data eradication.			
542	Adherence to DoD 5220.22-M or NIST SP 800-88 for data sanitization on retirement of storage devices.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
543	Storage limits defined and reasonable per service, group, and user.			
544	Capability to surpass service storage limits.			
545	Publish/provide locations of data centers storing data.			
546	Enterprise can dictate data locale residency.			
547	Documentation of the infrastructure providing service(s).			
548	Architecture diagrams for service.			
549	Support for bulk data import and export/extraction to/from service(s).			
550	Archive/e-discovery-as-a-service offering.			
551	Non-proprietary, enterprise level SQL compliant open data database.			
	Additional Hardware and Software			
552	The Solution must be supported through all internet browsers.			
553	The Solution must be hardware agnostic.			
554	Hardware and additional Software:			
555	Epson TM T88V Monochrome Thermal Receipt Printers.			
556	Star Micronics TSP100III Thermal Receipt Printers			
557	Honeywell 1250g and 1300g Barcode Scanners			
558	EnvisionWare RFID Antenna Reader			
559	Bibliotheca RFID Antenna Reader			
	Availability			
560	The Solution must be available 24 hours a day, 7 days per week; 365 days per year, unless there is a need for maintenance.			
	Network Security and Intrusion Prevention			
561	VENDOR always agrees to maintain network security that, at a minimum, includes network firewall provisioning, intrusion detection, and regular third-party vulnerability assessments. Likewise, VENDOR agrees to maintain network security that conforms to generally recognized industry standards and best practices that VENDOR then applies to its own network.			
562	Network communication shall be TCIP/IP.			
	Performance			
563	The expected system volume: Total circulation of 4,411,884 for FY24			
564	Simultaneous system users: Approximately 300			
565	Anticipated future rate of growth: Minimum 20% growth over next three years			
566	Peak times during the month or year: June to August			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
Data Backup and Recovery				
567	Any data entered, loaded, and stored in the software are property of the library. The VENDOR shall provide the County a copy of its data for any reason, and at the termination of the services, at no cost to the County.			
568	System able to be cloned, allowing library to create a complete functional copy of the system {database} on additional servers in order to test updates and train staff.			
569	In the event of an emergency or time-sensitive situation, the VENDOR shall provide the library the ability to completely retrieve the data from the cloud within 24 hours.			
570	Database and server instances			
571	Full Backups			
572	Incremental Backups			
573	RETURN OF CONFIDENTIAL INFORMATION: The VENDOR will return or destroy the library's confidential information in all forms and types of media and provide written confirmation or certification of such destruction within 30 days. If the data is returned to the County, the VENDOR shall provide the data in the file format agreeable by the County.			
574	RECORDS RETENTION: To ensure compliance with data retention schedules, the VENDOR will retain data according to retention schedules specified and shall return or destroy the library's records as requested			
Security, Regulatory, and Legal Requirements				
575	VENDOR agrees to ensure its software and services comply with all applicable laws and regulations. VENDOR shall, at no additional charge, promptly furnish any updates to the software and services necessary for compliance with any changes in laws or regulations during the terms of this Agreement.			
576	the library may, at its expense and for reasonable grounds, require VENDOR to participate in audits and tests relative to County systems and/or services provided by VENDOR on behalf of the County.			
577	VENDOR will take every reasonable precaution to ensure the services and software do not contain any virus or similar code that may destroy, modify, alter, or cause destruction, modification, or alteration in whole or in part, of any the library data, equipment, networks, or software.			
578	VENDOR agrees to allow the library access to system security logs that affect this contract, its data, and/or its processes. The VENDOR must provide self-service log reporting or review option, or the VENDOR must produce logs based on regulatory retention requirements of data held (e.g., PCI, HIPAA, etc.)			
579	The parties agree that the vendor will provide certain services to, for, or on behalf of the library involving the use or disclosure of Protected Health Information (PHI), as that term is defined by the Health Insurance Portability and Accountability Act (HIPAA). As such, the parties agree to the attached Business Associate Agreement.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
580	Notification of security incident or data breach: the library requires a minimum of twenty-four (24) hours notification when any data protection is compromised, or security incident occurs. Unauthorized access or disclosure of non-public data is considered a breach. The VENDOR will provide notification to the County as soon as it is aware of the breach. If the VENDOR is liable for the loss, the VENDOR shall bear all costs associated with the investigation, response, and recovery from the breach. The breach must be communicated to the library's Security Officer.			
581	Prior to the effective date of this agreement, VENDOR will, at its expense conduct or certify that the following certifications have been performed:			
582	Attestation under HIPAA, PCI, DSS and/or FedRAMP (NIST, FIPS 200 and SP800-53, ISO 27001, SOC)			
583	A SOC 2 audit of providers security policies, procedures, and controls. SOC 2 provided must report on security controls of the solution/application.			
584	A vulnerability scan performed by a third-party service of VENDOR systems under this agreement.			
585	A formal penetration test performed by a process and qualified personnel of VENDOR systems under this agreement.			
586	VENDOR will provide the library the reports or other documentation resulting from the above audits, certifications, scans, and tests within 30 calendar days of VENDOR's receipt of such results. Based on the results of the above audits, certifications, scans and tests, VENDOR will, if the results require, within thirty (30) calendar days of receipt of such results, promptly modify its security measures to meet its obligation under this Agreement and provide the library with written evidence of remediation.			
587	the library may, at its expense and reasonable grounds, require VENDOR to perform additional audits and tests, the results of which will be provided to the library within seven business days of VENDOR's receipt of results.			
588	VENDOR shall protect the library's data against deterioration or degradation of data quality and authenticity, including, but not limited to, annual third-party data integrity audits performed by an independent, external organization to determine the VENDOR's compliance with standards.			
589	VENDOR agrees to allow the library (or a designated third-party selected by the library) the opportunity to perform an onsite inspection of the VENDOR's infrastructure and security practices on an annual basis.			
590	the library reserves the right to review the infrastructure and security specifications of the VENDOR in written format on an annual basis.			
	User Authentication and Access Rights			
591	All facilities used to store, and process the library's data will implement and maintain administrative, physical, technical, and procedural safeguards and industry best practices at a level sufficient to secure such data from unauthorized access, destruction, use, modification, or disclosure. Such measures will be no less protective than those used to secure the VENDOR's own data of a similar type, and in no event less than, for data of the same type and nature, during the term of this Agreement.			

Attachment D - System Requirements

Number	Requirement	Met	Not Met	Partially Met
592	The VENDOR must take the same care to prevent the disclosure of the library's confidential information as it takes to prevent disclosure of its own information of a similar nature. In no event, may the VENDOR take less than a reasonable degree of care.			
593	VENDOR warrants that all sensitive the library data will be encrypted in transit and at rest (including via web interface). Sensitive data includes the following:			
594	· Health Insurance Portability and Accountability Act (HIPAA)			
595	· Payment Card Information (PCI)			
596	· Personal Identifying Information (PII)			
597	· Personal Health Information (PHI)			
598	· Other sensitive data			
599	ADA Accessibility: VENDOR warrants all digital and interactive content will meet or exceed Web Content Accessibility Guidelines (WCAG) 2.0 A and WCAG 2.0 AA conformance standards, published by the World Wide Web Consortium (W3C), Web Accessibility Initiative (WAI), the organization responsible for developing internet standards. Web accessibility means that people with disabilities can fully and equally perceive, understand, navigate, and interact with the Web as their non-disabled counterparts.			
600	Role-based GUI			
601	The VENDOR must be able to support Service Provider Initiated SSO (SP) a Single Sign-On (SSO) scenario. The following are considered SSO scenarios: Identity Provider Initiated SSO (IdP) SSO for Application Programming Interfaces (APIs), web interfaces and mobile devices			
602	The VENDOR must support Azure Active Directory (AD) as IdP.			
	User Experience			
603	The vendor must provide a QA environment for internal testing of data and functionality.			
604	The vendor must provide a UAT environment for business partner testing of data and functionality.			
	Data Retention			
605	the library data, all backups shall NOT be located, accessed, processed, or stored outside of the United States. Data storage MUST be physically in the United States.			

Definition	Acronym
Abbreviation for Check-In	CKI
Abbreviation for Check-Out	CKO
Borrower Statistical Class – In the borrower record, county identification or other designation like Friends of the Library, Permanent Non-Resident are defined.	BSTAT
Borrower Type	BTYPE
Item Type	ITYPE
An electronic ordering application (https://librarytechnology.org/pr/8203)	EDI

Attachment F – Supplemental Questions and Additional Information

1. Implementation Approach
 - a. Describe the vendor(s) approach to providing the services specified in this RFP, including a description of implementation milestones (including data migration, testing and end user training).
2. Project Management
 - a. Provide a description of your project management methodology and project management approach to be utilized for this engagement. This should include a description of the vendor's standard approach to, at a minimum, schedule management, status reporting, risk and issue management.
3. Data Migration & Conversion
 - a. Describe experience migrating data from Horizon version 7.6.
 - b. Describe your approach to developing the data migration and conversion plan and the processes and tools that must be used to migrate and convert legacy data into the new system.
4. System Administration
 - a. Describe the administrative tools and functions used to manage end user access.
 - b. Regarding role-based access methodology, describe the level of granularity a system administrator has in assigning user access, privileges and preferences based on characteristics such as job role within the Library.
 - c. Describe how much customization control an end user with administrative rights would have.
5. Testing
 - a. Describe your proposed training approach for the Library, including but not limited to, the responsibilities of both the vendor and the Library staff as it relates to training and roles.
 - b. Describe your proposed approach for providing a separate training environment that mirrors the production environment but does not disrupt ongoing operations once the system is live and new employees require training.
6. Training
 - a. Provide a plan for staff training and change management for staff at the following levels:
 - i. Systems administration
 - ii. Technical services (including Acquisitions, Cataloging, and Serials)
 - iii. Front line public services
7. Operational Support Plan
 - a. Describe how support will be provided post system go-live.
 - b. Describe product's Service Level Agreement model.
 - c. Describe how bugs not found during implementation will be addressed past go live.

Attachment F. Pricing Worksheet

Regardless of exceptions taken, Companies shall provide pricing based on the requirements and terms set forth in this RFP. Pricing must be all-inclusive and cover every aspect of the Project. Cost must be in United States dollars. **If there are additional costs associated with the Services, please add to this chart. Your Price Proposal must reflect all costs for which the County will be responsible.**

For purposes of this Solicitation, assume an initial term of five (5) years, with the County having an option to renew for two (2) additional consecutive one (1) year terms thereafter.

1. Provide an all-inclusive annual rate for the proposed services.

Service	Proposed Cost				
	Year 1	Year 2	Year 3	Year 4	Year 5

2. Provide hourly billing rates for key personnel that may be needed to complete additional services not included in the Scope of Services.

Job Title/Labor Category	Hourly Rate

Good/Service	Amount	Estimated Costs per unit, hour, etc.	Total Cost
		\$ -	
		\$ -	
		\$ -	
		\$ -	
		\$ -	
		\$ -	
		\$ -	
Sum:			

Additional Comments: