



Request for Quote for an Integrated Library System

For The Penticton Public Library

Daniel Lerch

Issue Date of this RFQ	January 5th, 2021
Last Updated	January 6th, 2021
Closing Date and Time:	February 9th, 2021 9:00 pm

Instructions

Ensure you have read the entire Request for Quote before applying. Complete the following and email as a single PDF to dlrch@summer.com

Section 1A - Minimum Requirements for an ILS
Section 3 - Experience
Section 4 - Cost
Section 5 - Declaration and Signature
Appendix A - References

Section 1. General Information

Purpose

The purpose of this document is to survey potential vendors who have the capacity to migrate and support an Integrated Library System (ILS). As a result of this process we may engage in further discussions with a single vendor, or multiple vendors. These discussions may include live virtual product demonstrations, contract negotiation, or may result in the signing of a single contract for service. The Penticton Public Library may also decide to take no further action, or cancel this Request for Quote outright.

Project Background

The Penticton Public Library seeks quotes for a single hosted Integrated Library System (ILS). We expect that the recommended ILS will provide the best solution for the requirements and may include products from a single vendor or multiple vendors, with only one vendor submitting the quote. This vendor will be responsible for the entire implementation of the recommended solution.

Library Information as of January 03, 2021

Bibliographic Records	89599
Item Records	97083
Authority Records	114,813
Population Served	35,000
Cardholders	29258
Annual Circulation	325,270
Locations	1

A. Minimum Requirements for ILS

Modules: The Penticton Public Library has based this RFQ on the assumption that only vendors with proven implementations in the mandatory core modules listed below will respond to this RFQ. The Penticton Public Library expects that sophisticated, mature functionality will be in place for these modules, and that while there will be differences between vendors, the core functionality for these modules is developed and currently implemented in libraries of equal and greater size to Penticton's. Furthermore, The Penticton Public Library will expect any

vendors who are short-listed to demonstrate the core features and benefits for each module during a virtual demonstration.

The following modules are mandatory. We will be unable to accept any quote that does not contain the following 4 core modules. Please confirm you are able to meet the following requirements with a Y or N under the column Yes/No.

Required Core Modules	Yes/No
Circulation	
Cataloging	
Public Catalogue	
Serials	

The following additional modules are optional. Please confirm if your ILS solution is able to fulfill the following modules with a Y or N under the column Yes/No. Please indicate with an X any optional core modules your ILS solution is unable to fulfill. You may also add an optional note for any module you wish to elaborate on. For example, notes could describe modules currently in development, or explanations of sufficient workarounds to a module.

Optional Core Modules	Yes/No	Notes
Acquisitions		
Homebound (Library Delivery)		

Critical Requirements: The following critical requirements are mandatory. We will be unable to accept any quote that does not fulfill the following 6 requirements. Please confirm you are able to meet the following requirements with a Y or N under the column Yes/No. You may also add an optional note for any critical requirement you wish to elaborate on.

	Critical Requirements	Yes/No	Notes
1	ILS is hosted in Canada. All patron data kept in Canada		
2	All features are administered via a web browser and are accessible anywhere		
3	Security measures are included to		

	minimize chance of fraudulent activity or access		
4	There are no additional charges for SIP licenses or regularly used authentication layers		
5	Database export provided by request. (csv, json, sql files are all acceptable)		
6	Ability to add or subtract library branches from within the service population at no additional cost		

B. Pricing

The Penticton Public Library will give preference to quotes that are less than \$25,000 CDN before Government Sales Tax (GST) and Provincial Sales Tax (PST) for the first year of service, and less than \$15,000 CDN before Government Sales Tax (GST) and Provincial Sales Tax (PST) for subsequent years of service. Vendors with quotes exceeding these costs are nonetheless invited to apply.

C. 3rd Party Vendors

The Penticton Public Library currently uses SIP2, EZPROXY, and IP to authenticate 3rd Party vendors. The Penticton Public Library expects 3rd party vendors to integrate seamlessly into the ILS.

Vendor	Notes
Overdrive	
Envisionware	
Syndetics Solutions	PC reservation software
Tumblebooks	
LinkedIn Learning	
Lynda.com	
Mango Languages	
EBSCO	
PressReader	

D. Project Timeline

After a signed contract is finalized, the library will provide 7 months for the cleanup of existing data, migration, and staff training. The vendor will liaise with the System's Librarian and other Penticton Public Library staff to ensure the migration is successful. The migration must be completed by October 31, 2021.

E. Official Contact and description of how questions can be answered

The sole point of contact at The Penticton Public Library related to this RFQ is:

Daniel Lerch
Systems Librarian
Penticton Public Library
785 Main Street
Penticton, BC V2A 5E3
dlersch@summer.com

The above-named RFQ contact person is the only person that any vendor representative to this RFQ may contact during this RFQ process. Information obtained from any source other than the RFQ contact person is unofficial and must not be relied upon as part of this RFQ. Vendor representatives must not contact any other employees, board members, elected officials or other representatives of The Penticton Public Library regarding matters related to this RFQ. Any vendor found to have contacted persons other than the RFQ contact person, may be disqualified from submitting a quote, or have their quote rejected.

F. Evaluation of Quotes

The Penticton Public Library will conduct an evaluation of quotes which may result in vendors being shortlisted. A group composed solely of Penticton Public Library employees will determine if the quotes submitted meet the technical and cost requirements to engage in further discussion.

G. In-Depth Functional Requirements

At this time the Penticton Public Library does not plan on scoring RFQs with detailed ILS requirements. However, before submitting a quote we ask that your organization review the

detailed list of requirements posted on our website for which we have carefully considered.
<https://www.pentictonlibrary.ca/ils-requirements>.

Section 3. Experience

Please answer the following questions in one or two paragraphs.

- A. Please describe your corporate history: how many years has your organization been in business? How many Canadian clients do you have? How many employees do you have?
- B. Please describe your process for handling support requests.
- C. **Optional:** Describe any other products related to public libraries you are currently supporting or developing.

Section 4. Cost

Please provide a detailed cost breakdown for service in Canadian dollars (CDN) excluding Government Sales Tax (GST) and Provincial Sales Tax (PST). Include first year pricing, as well as cost for subsequent years of service. You may also include subsequent years as a multiyear purchase option. At minimum the cost breakdown should describe the cost for hosting the ILS, the core ILS suite, staff training, migration, and ongoing customer support.

Section 5. Terms and Conditions

The following terms and conditions are in addition to those that will be contained in a signed contract with the winning vendor. To the extent there are any conflicts between this RFQ and the signed contract, the Terms and Conditions in the signed contract will prevail.

1. Rejection of Quote and Waiver of Informalities

The Penticton Public Library, in its sole discretion and authority, may determine that it is in the best interest to reject any or all quotes submitted in response to this RFQ. The Penticton Public Library, in its sole discretion and authority, may disregard or waive any informality in the quote or bidding process.

2. Reservations

Vendors must read and understand the solicitation and tailor the quote and all activities to ensure compliance. The Penticton Public Library reserves the right to: amend the solicitation; reject any or all of the quotes; and waive minor defects. The Penticton Public Library may request a clarification, interview staff, request a presentation, or otherwise verify the contents

of the quote, including information about subcontractors and suppliers. The Penticton Public Library may request best and final offers where appropriate. The Penticton Public Library will make all decisions on compliance, evaluation, terms and conditions, and shall make decisions in the best interests of The Penticton Public Library. Failure of a vendor to comply with requests for information or cooperate may result in the quote being deemed non-responsive to the solicitation. Submitting a quote does not entitle a vendor to an award or contract. The Penticton Public Library is not responsible for and will not pay any costs associated with the preparation and submission of any quote. Awarded vendors shall not commence, and will not be paid for, any billable work prior to the date all parties execute the contract.

3. Retention of quotes and FOIPPA:

All documents submitted to The Penticton Public Library will not be returned and will be retained in accordance with the Freedom of Information and Protection of Privacy Act ("FOIPPA"). Vendors should note that in accordance with the provisions of FOIPPA, certain details of this RFQ and any executed contract may be made public, including the vendor's name and total contract price. Vendors should identify any information which is supplied in confidence, however, vendors should be aware of and review The Penticton Public Library's obligations under FOIPPA and The Penticton Public Library's limited ability to refuse to disclose third party information pursuant to section 21 of FOIPPA.

4. Responsibility

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

5. Errors and Omissions

It shall be understood and acknowledged that while this RFQ includes specific requirements and specifications, minor items or details not herein specified, but obviously required shall be provided as if specified in conformance with current practices and workmanship. Any omissions, errors or misinterpretation of these requirements and specifications or within the

request for quote shall not relieve the vendor of the responsibility of providing the goods and services as aforesaid.

6. Disclosure of Bid Information

The vendor acknowledges that submission of a bid for this request for quote will be deemed by The Penticton Public Library to be the vendor's consent to The Penticton Public Library publishing or releasing the awarded vendor's name and total bid price (if applicable), publicly in any format including without limitation the right to post this information on its website and include it in written reports to The Penticton Public Library Board. Any limitation or qualification on the Penticton Public Library's right to release the awarded contractor's name and total bid price (if applicable), will result in the bid being found non-compliant. The Penticton Public Library appreciates the sensitive nature of unit pricing and will endeavor to hold unit pricing in confidence but may be required to release such information pursuant to court order or legislation including the Freedom of Information and Protection of Privacy Act ("FOIPPA").

All responses, inquiries, and correspondence relating to this RFQ and all reports, charts, displays, schedules, exhibits, and other documentation produced by the Request for Quote process that are submitted as part of the quote or otherwise shall become the property of the Penticton Public Library and may be considered public information under applicable law.

7. Awards and Negotiations

The Penticton Public Library reserves the right to enter into discussions with the vendor whose quotes are deemed most advantageous for the purpose of negotiation. If more than one quote is found to be satisfactory, The Penticton Public Library reserves the right to negotiate simultaneously with more than one vendor. The Penticton Public Library also reserves the right to stay with its current ILS provider if it determines that this is the best interest of The Penticton Public Library.

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

Contract award and negotiations will be in accordance with the purchasing policies of The Penticton Public Library.

8. Amendment of a Quote by The Vendor:

A vendor may amend a quote at any time up until the RFQ closing date and time. Amendments must be submitted in the same way as the original quote, as detailed. Amendments to a quote must be clearly labelled as such, and must contain the RFQ title, and the full legal name and legal address of the vendor. Amendments must clearly detail which part(s) of the quote is being amended or replaced.

9. Withdrawal of a Quote by Vendor :

A vendor may withdraw a quote that is already submitted at any time throughout the RFQ process, including after the closing date and time.

10. Addenda Issued by The Penticton Public Library:

This RFQ may only be amended by way of an addendum issued in accordance with this section. At any time up until the closing date and time, The Penticton Public Library may issue an addendum in order to amend, clarify, or answer questions to this RFQ. Each addendum will be issued at the same location and in the same manner as this RFQ document. Each addendum will form an integral part of this RFQ. Vendors Are solely responsible for checking for addenda up until the closing date and time. If The Penticton Public Library deems it necessary to issue an addendum after the last day for issue of addenda, The Penticton Public Library may extend the closing date and time in order to provide vendors with more time to complete their quote.

11. Only One Entity as Vendor :

The Penticton Public Library will accept quotes where more than one organization or individual is proposed to deliver the services, so long as the quote identifies only one entity that will be the lead entity and will be the vendor with the sole responsibility to perform the contract if executed. The Penticton Public Library will only enter into a contract with that one vendor. Any other entity involved in delivering the service should be listed as a subcontractor. The vendor may include the subcontractor and its resources as part of the quote and The Penticton Public Library will accept this, as presented in the quote, in order to perform the evaluation. All subcontractors to be used in the Service must be clearly identified in the quote.

12. References and Experience:

In evaluating a vendor's experience, as per the scored criteria, The Penticton Public Library may consider information provided by the vendor's clients on the projects submitted in the quote, and may also consider The Penticton Public Library's own experience with the vendor .

13. RFQ Scope of Work is an Estimate Only:

While The Penticton Public Library has made every effort to ensure the accuracy of the services described in this RFQ, The Penticton Public Library makes no guarantees as to the accuracy of the information provided. Any quantities or measurements provided are estimates only and are provided to describe the general nature and scale of the services. Vendors must obtain all information they deem necessary, including verification of quantities or measurements in order to complete a quote.

14. Vendor 's Expenses:

Vendors are solely responsible for their own expenses in participating in this RFQ process, including costs in preparing a quote and for subsequent finalizations of an agreement with The Penticton Public Library, if required. The Penticton Public Library will not be liable to any vendor for any claims, whether for costs, expenses, damages or losses incurred by the vendor in preparing its quote, loss of anticipated profit in connection with any final contract, or any matter whatsoever.

15. Incorporating Costs

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

16. Confidentiality:

All information provided to the vendor by The Penticton Public Library as part of this RFQ process is the sole property of The Penticton Public Library and must not be disclosed further without the written permission of The Penticton Public Library.

17. No Contract A and No Claims:

This RFQ process is not intended to create and no contractual obligations whatsoever (including what is commonly referred to as 'Contract A') shall arise between The Penticton Public Library and any vendor upon the submission of a quote in response to this RFQ. For extra clarity, both the vendor and The Penticton Public Library are free to cancel their participation in this RFQ process at any time up until the execution of a written contract for the services.

Without limiting the above paragraph, no vendor shall have any claim whatsoever against The Penticton Public Library for any damage or other loss resulting from a vendor's participation in this RFQ, including where The Penticton Public Library does not comply with any aspect of this

RFQ and including any claim for loss of profits or quote preparation costs should The Penticton Public Library not execute a contract with the vendor for any reason whatsoever.

18. Vendor Insolvency and Default

The purchase may be terminated effective upon written notice to the vendor in the event that the vendor files for bankruptcy, becomes insolvent, makes an assignment for the benefit of creditors, or has a receiver appointed, or any proceeding is demanded for, by or against the vendor under any provision of the Federal Bankruptcy Act or any applicable provincial law.

Upon default of the vendor, the Penticton Public Library may reduce or cancel the contract in the event that any delivery or deliveries affected are not made at the time specified in the quote.

19. Governing Law and Trade Agreements:

This RFQ is governed by the laws of the Province of British Columbia and any other agreements which exist between the Province of British Columbia and other jurisdictions.

Section 5. Declaration and Signature

DECLARATION:

The undersigned hereby declares this Request for Quote has been carefully examined and the quote is submitted in compliance therewith, including the Terms and Conditions in Section 4. Failure to sign this page will result in non-acceptance of this quote.

AUTHORIZED REPRESENTATIVE:

Company Name	
Address	
Postal Code/Zip Code	
Telephone Number	
Email	
Name	
Title	
Authorized Signature	
Date	

Appendix A. References

Please provide three (3) professional references from clients currently using your services.

Reference 1
Client:
Contact Name:
Contact Phone Number:
Contact Email:

Reference 2
Client:
Contact Name:
Contact Phone Number:
Contact Email:

Reference 3
Client:
Contact Name:
Contact Phone Number:
Contact Email: