

# REQUEST FOR PROPOSALS

Integrated Library System, Discovery and  
Mobile Experience

For



Proposal Accepted until 5 pm CST, January 8, 2027

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## **1.0 RFP Introduction**

### **1.1 Viking Library System**

Viking Library System (VLS) is one of Minnesota's twelve regional public library systems serving a six-county region in west central Minnesota. VLS is a federated regional library system that provides a shared Integrated Library System (ILS), discovery experience and related technology services to eleven member libraries and a bookmobile. The VLS bookmobile serves multiple scheduled stops. Respondents should describe how the proposed solution supports online and offline bookmobile circulation, stop-level reporting, and any alternatives to maintaining separate location codes for each stop.

VLS member libraries are independently governed and locally administered organizations, not branches of VLS. As such, member libraries require a greater degree of local autonomy, configuration flexibility, and administrative control than would typically be found in a consolidated library system.

VLS serves as the administrator of the shared ILS, discovery experience, and mobile experience and is responsible for system-wide configuration, vendor management, integrations, security, and consortium-wide policies. A shared ILS, in VLS's environment, consists of a shared patron database with library-specific home locations and shared access to system-wide collections and patron records. Each member library purchases, catalogs, and maintains its own collection; however, staff at any VLS member library may view bibliographic records and add holdings to those records regardless of the owning library.

Member libraries must retain the ability to manage approved local functions, workflows, policies, patron-facing content, locations, hours, and other library-specific settings without affecting other member libraries or consortium-wide operations. The discovery experience should enable both VLS and member libraries to maintain public-facing websites and informational content without requiring a separate website content management system.

The proposed solution should support both centralized consortium administration and local library autonomy through granular permissions, configurable workflows, delegated administration, and library-specific settings, where appropriate. Respondents should

clearly identify which functions may be administered centrally by VLS and which functions may be delegated to individual member libraries.

VLS's current ILS and Discovery service is SirsiDynix Horizon version 7.6.1 with plans to migrate to version 7.6.2 prior to year-end, Enterprise version 5.2.1.6, and SQL database. VLS has approximately 70 VLS and member library staff Citrix seats. Together, VLS member libraries and the bookmobile circulate approximately 759,000 physical items annually and have approximately 44,932 registered borrowers. The libraries and bookmobile share 485,010 item records on 282,298 bibliographic records. VLS currently utilizes patron and item Codabar barcodes with 14 digits.

## **1.2 Project Overview**

VLS is seeking proposals from a vendor or vendors to provide and implement a complete, production-ready ILS, patron discovery experience, and mobile solution. The proposed solution must provide modern staff functionality and an intuitive patron-facing discovery environment. Vendor(s) will be selected to provide implementation, including required integrations, day-to-day operations, and ongoing support of the ILS, and discovery and mobile solutions.

VLS seeks a solution designed to support a federated consortium model. The proposed platform must balance centralized administration of shared services with the operational flexibility required by independently governed member libraries. Respondents should describe how their solution supports library-level customization while preserving centralized control of consortium-wide functions.

Examples of functions that may remain under VLS administration include system-wide configuration, creation and management of shared item types and patron categories, user role administration, authentication services, integrations, and other settings affecting all participating libraries. Conversely, member libraries should be able to manage local functions such as holdings management, workflows, patron-facing content, notifications, locations, hours, events, and other library-specific settings without affecting consortium-wide operations.

It is expected that the vendor(s) will provide:

- Project management
- Technical installation expertise

- Direct training to VLS and member library staff
- Post-implementation support

The new solution must be fully implemented by **January 11, 2028\***.

\*VLS anticipates implementation of the ILS, discovery, and mobile experience as a coordinated project. Respondents should indicate whether all proposed components can be deployed concurrently. VLS recognizes that certain mobile application solutions may require a separate implementation schedule and may permit a phased deployment following the ILS and discovery experience go-live. Any phased deployment proposal must include a detailed project plan, expected completion date, interim functionality available to patrons, and any additional costs associated with the phased approach. Proposals will not be disqualified solely because the mobile application is proposed for implementation after the initial ILS and discovery launch.

VLS reserves the right to proceed with implementation of the ILS and discovery solutions while deferring or declining implementation of a proposed mobile solution based on evaluation results, project priorities, budget considerations, or other factors determined by VLS.

The proposed ILS must offer a hosted solution capable of supporting:

- Circulation
- Interlibrary loan
- Reporting
- Cataloging
- SIP and NCIP functionality
- OAI-PMH functionality
- Administrative modules
- Role-based security and system administration supporting a federated library consortium

Robust web-based functionality is highly preferable over any form of desktop client functionality.

For the proposed discovery and mobile experience solutions, vendors may propose a:

- Native discovery experience and mobile application
- Third-party discovery experience and/or mobile application

- Combination of native and third-party solutions

VLS encourages proposals that include supported integrations with commercially available discovery products such as BiblioCommons and other solutions capable of enhancing patron engagement.

When proposing third-party discovery or mobile solutions, the respondent shall act as the primary proposer and shall be responsible for coordinating all implementation activities, integrations, pricing, support relationships, and project management associated with the proposed third-party products unless otherwise specifically identified in the proposal.

Respondents must clearly identify all the following:

- All third-party partners and subcontractors
- Support and escalation responsibilities
- Integration architecture
- Implementation requirements
- Additional costs and licensing fees
- Existing production libraries using the proposed ILS/discovery combination

The discovery and mobile experience will be evaluated as a distinct component of this procurement and may be weighted separately from core ILS functionality.

Applications to be quoted are:

- Systems hosted by vendor (SAAS)
- ISO-compliant NCIP functionality to work with statewide ILL MNLINK
- Robust API connections (clearly state if this is part of another module or individual per use fee or other)
- SIP connections to third party vendors or other integration method
- Circulation module
- Cataloging module
- Serials module (if available)
- Acquisitions module (if available)
- Reporting and statistical module
- Native PC-Based Self-Check module
- Discovery Experience
- Mobile Application
- Test Server environment

Vendors must clearly identify all capabilities, associated costs, implementation requirements, and support responsibilities.

VLS anticipates selecting an ILS, discovery, and mobile solution through a single procurement process. The selected discovery and/or mobile solutions may be provided under either the primary contract or a coordinated third-party agreement, depending on the implementation model proposed by the respondent.

### **1.3 RFP Schedule**

Below is the timetable that has been set for this project:

- RFP Release Date: October 21, 2026
- Deadline for Vendor Questions: November 20, 2026
- Responses to Vendor Questions Posted: December 9, 2026
- Proposal Due Date: January 8, 2027, at 5:00 p.m. CST
- Vendor Demonstrations (if required): February 2027
- Contract Award: March 2027
- Contract Negotiation and Execution: March-April 2027
- Project Kick-off: April 2027
- Implementation Period: April 2027 through December 2027
- Target Go-Live Date: January 11, 2028

### **1.4 Inquiries**

Inquiries concerning this procurement, including questions relating to technical issues are to be directed to:

Erin Smith, Director  
Viking Library System (VLS)  
1915 W. Fir Ave.  
Fergus Falls, MN 56537  
Email: [esmith@vikinglibrarysystem.org](mailto:esmith@vikinglibrarysystem.org)  
Phone : 218-739-5286

All questions concerning the RFP must reference the RFP page number, section heading, and paragraph. Please state the question as concisely as possible. All questions regarding this RFP must be received no later than November 20, 2026, with answers/addenda published on the VLS website ([www.viking.lib.mn.us](http://www.viking.lib.mn.us)) by December 9, 2026.

Proposers are directed specifically to not contact any staff other than specified personnel identified above for any purpose. Unauthorized contact of any personnel may be cause for rejection of the proposer's RFP response.

## **1.5 Required System Functions**

VLS has defined its general, consortium administration, ils, discovery, and mobile capabilities in Part 4 of this RFP. Please note that some capabilities are mandatory.

## **1.6 Selection Process**

At its discretion, VLS may require bidders, at their own costs, to provide demonstrations of their product(s) including the staff-side ILS and the patron-facing discovery experience and mobile application(s). VLS will schedule any such demonstrations. Representatives of VLS may choose to visit client references to observe the applications in a working environment.

The award/negotiation sequence will be based on a selection methodology established by VLS. The proposed ILS, discovery, and mobile solution will be scored independently. A committee selected by VLS will evaluate each proposal, taking into consideration the criteria and methodology stipulated in this RFP. Proposals will be evaluated using the criteria and methodology identified in this RFP. Following evaluation, demonstrations, interviews, reference checks, and any permitted clarifications, VLS may award a contract to the respondent whose proposal is determined to provide the best overall value to VLS.

## **2.0 Response Requirements and Conditions**

### **2.1 Proposal Response Instructions**

The proposal must be received no later than 5:00 p.m. (CST) on January 8, 2027, to the following individual:

Jody Lehn  
Office Coordinator  
Viking Library System  
1915 W. Fir Ave.  
Fergus Falls, MN 56537  
Phone: 218-739-5286

Proposals must be submitted in sealed packages (if submitting a hard copy) or via email to [jlehn@vikinglibrarysystem.org](mailto:jlehn@vikinglibrarysystem.org) with the following information clearly indicated:

- Name of responder
- Project title: Integrated Library System, Discovery and Mobile Experience RFP

Failure to comply with the requirements of this RFP may result in disqualification. Bidders shall have sole responsibility for delivery of bids on time and to the proper location. Proposals received after the time and date specified above may not be considered.

Facsimile bids will not be considered.

### **2.2 Proposal Costs**

Those submitting proposals do so entirely at their own expense. There is no expressed or implied obligation by VLS to reimburse any individual or firm for any costs incurred in preparing or submitting proposals, providing additional information when requested by VLS, or for participating in any selection interviews or product demonstrations.

### **2.3 Tax Exemption**

VLS is a local governmental organization that is exempt from sales and use taxes. Following the contract award, an exemption certificate will be furnished upon request.

## **2.4 Bid Confidentiality**

All materials submitted in response to this RFP become the property of VLS upon delivery and are to be appended to any formal documentation that would further define or expand any resulting contract. Proposals are subject to the Minnesota Government Data Practices Act, Minn. Stat. Chapter 13. If proprietary information is needed to support your proposal, it must be packaged separately and labeled “CONFIDENTIAL”. Such labeled items will be returned at the end of the selection period.

## **2.5 RFP Process Conditions**

The vendor agrees to adhere to and accept the following conditions:

- A. VLS reserves the right to determine whether a respondent is qualified based upon the information submitted in the proposal, reference checks, demonstrated experience, financial capacity, and ability to successfully perform the services contemplated by this RFP.
- B. VLS reserves the right to accept or reject any or all proposals and to waive any irregularities or technicalities in the RFP technicalities that do not affect the fairness of the procurement process or materially alter a proposal.
- C. VLS reserves the right to make an award in whole or in part, to make multiple awards, to negotiate with the highest-ranked respondent and if an acceptable agreement cannot be reached, to terminate negotiations and proceed to negotiations with the next highest-ranked respondent, or to make no award at all if it determines that no proposal adequately meets VLS requirements or that doing so is in the best interests of VLS. VLS may elect to award contracts for the ILS, discovery experience, and mobile experience as a combined solution or may select one or more components independently. Submission of a proposal does not obligate VLS to award a contract for all requested components or to award a contract at all.
- D. VLS reserves the right to negotiate any alterations to bid specifications due to oversight or error.
- E. VLS reserves the right to accept or reject any exception taken by the vendor to the terms and conditions of this RFP.
- F. VLS reserves the right to seek clarification, in writing, from vendors about areas of their RFP response during the evaluation process.

- G. VLS will not pay for any information requested herein, nor will it be liable for any costs incurred by the vendor in preparing a proposal.
- H. Cost is one factor in the evaluation process. VLS reserves the right to award a contract to the respondent whose proposal provides the greatest overall value based upon the evaluation criteria identified in this RFP.
- I. VLS may select a vendor that proposes a native discovery and mobile solution or a vendor that proposes supported third-party products. Preference will not be given to either approach; proposals will be evaluated based on demonstrated functionality, usability, implementation approach, support model, and overall value.
- J. The proposal validity period shall be 90 days from the due date listed herein. Submission of a proposal constitutes a vendor's recognition of this condition.
- K. All proposals received become the property of VLS and will not be returned to the vendor.

## 3.0 Selection Process

### 3.1 Proposal Evaluation

VLS may consider phased implementation approaches when evaluating proposals. Preference may be given to solutions that deliver all components at initial go-live; however, phased deployment of the mobile experience may be acceptable when supported by a clear implementation plan, defined milestones, and demonstrated benefits to the overall project.

Proposals will be evaluated by a committee composed of staff from VLS and member libraries. The committee will decide which proposers will be invited to interview and show their software. The committee will prepare questions to ensure key software features are shown. The questions will be provided to the vendor in advance. The committee will evaluate proposals using the criteria identified in this RFP and make a recommendation regarding the proposal that provides the greatest overall value to VLS and its member libraries. VLS will make the final award determination based upon the committee's evaluation, demonstrations, reference checks, interviews, and the published evaluation criteria.

In evaluating the qualified bids, the following criteria will be considered:

| Category                        | Weight |
|---------------------------------|--------|
| Core ILS Functionality          | 25%    |
| Discovery Experience            | 15%    |
| Mobile Experience               | 10%    |
| Implementation & Migration      | 15%    |
| Support & Vendor Qualifications | 10%    |
| References                      | 5%     |
| Cost                            | 20%    |

Submission of a proposal constitutes acknowledgment of the evaluation process described in this RFP and recognition that evaluation of professional and technical services necessarily involves the exercise of judgment by VLS and its member libraries.

## **3.2 Contract Negotiations**

Following completion of the evaluation process, VLS may enter into negotiations with the highest-ranked respondent. This discussion will finalize any contract terms, including data migration, implementation services, acceptance criteria, support obligations, and pricing.

Negotiations are intended to finalize contract terms, pricing, implementation schedules, service levels, and other commercial terms. Negotiations shall not materially alter the scope of services described in the respondent's proposal or permit revisions that would compromise the integrity of the procurement process.

### **Service Levels**

VLS reserves the right to negotiate service level requirements as part of contract execution. Respondents shall identify their standard service level commitments, including system availability guarantees, maintenance windows, system upgrades, support hours, incident severity definitions, response time objectives, escalation procedures, and service credits or other remedies for failure to meet agreed performance standards. VLS may require modifications to proposed service levels during contract negotiations.

### **Third-Party Products**

Where a proposal includes third-party discovery, mobile, or other integrated products, respondents must clearly identify all participating organizations, contractual relationships, licensing requirements, implementation responsibilities, and support obligations. VLS reserves the right to negotiate terms with the primary respondent and/or any identified third-party provider. Additionally, VLS may require participation of third-party providers during contract negotiations to address licensing, support, implementation, or service responsibilities.

VLS may elect to execute a single agreement for all proposed products and services or separate agreements for individual solution components. Respondents shall identify any products or services that require separate agreements, subscriptions, or licenses.

Regardless of contractual structure, respondents must identify the party responsible for implementation coordination, issue escalation, and support of integrated functionality. VLS may require documentation defining service responsibilities between participating vendors.

### **Data Ownership**

During contract negotiations, VLS will require provisions addressing ownership of all library data, unrestricted access to library data during the contract term, data portability, final data delivery upon contract expiration or termination, transition assistance to a successor provider, and secure destruction of data following completion of the transition. Vendors shall disclose any fees associated with these activities.

### **Contract Form**

The successful vendor's contract shall be reviewed and approved by the VLS's attorney's office prior to execution by the VLS Board of Trustees.

If an acceptable contract cannot be negotiated, VLS reserves the right to enter contract negotiations with any other vendor who submitted a proposal.

It is mutually agreed between VLS and the vendor that VLS's acceptance of the vendor's offer by the issuance of written notification incorporates into the resulting agreement all terms and conditions of the RFP and the vendor's proposal, except as amended by mutual agreement.

Using the conventions outlined in 4.0, the vendor must clearly state in the submitted proposal any exceptions to, or deviations from, the requirements or terms and conditions of this RFP. Such exceptions or deviations will be considered in evaluating the proposals.

## **3.3 Rejection of Proposals**

VLS reserves the right to reject any or all proposals, to make an award in whole or in part, to make multiple awards, or negotiate where determined to be in VLS's best interests, or to make no award if doing so is determined to be in the best interests of VLS. VLS may negotiate with the highest-ranked respondent and, if negotiations are unsuccessful, may proceed to negotiations with the next highest-ranked respondent. Submission of a proposal does not obligate VLS to award a contract. All respondents will be notified by email of the outcome of the procurement process within three (3) business days following a contract award or decision to make no award.

## **3.4 Nondiscrimination**

VLS shall not discriminate based on race, color, sex, creed, religion, ancestry, disability, familial status, or national origin in selecting the vendor for the Integrated Library System.

The successful vendor agrees that it shall not discriminate in its performance of the contract based on race, color, sex, creed, religion, ancestry, disability, familial status, or national origin.

### **3.5 Demonstrations**

Vendors selected as finalists may be required to provide scripted demonstrations addressing both staff and patron workflows.

Finalists may be required to demonstrate:

ILS:

- Create a patron
- Check out materials
- Place and manage holds
- Process a lost item
- Import and edit a MARC record
- Perform a batch update
- Reporting and Analytics demos:
  - Create an ad hoc report
  - Create a collection development/weeding report using multiple criteria
  - Demonstrate dashboards, statistical summaries and report scheduling capabilities, if available
- Create a staff account and permissions
- Demonstrate e-content integration
- Explain migration from SirsiDynix Horizon
- Demonstrate how offline circulation functions
- Demonstrate the recommended implementation approach for VLS bookmobile operations. Identify any required or recommended configuration changes, customizations, workflows, etc. necessary to support stop-level circulation tracking and reporting.
- Demonstrate RFID integration workflows:
  - RFID circulation
  - RFID self-check, if supported
  - RFID inventory management
  - Integration with third-party RFID equipment

Discovery:

- Search for a bestselling title available in various formats, including digital
- Place a hold from a mobile device
- Locate a title immediately available through Libby
- Access account information using accessibility tools
- Demonstrate narrowing a search using facets
- Demonstrate predictive search functionality
- Demonstrate searching for a book series and identifying the next title in reading order
- Demonstrate how the discovery experience can function as the primary public website for a member library; provide examples of current implementations; demonstrate how member library staff can access and update their library's profile without affecting other member library's web profiles. Demonstrate how VLS headquarters administrative staff can be set as the only staff permitted to manage features and functions affecting all profiles.
- Demonstrate patron payment of fines or fees through the discovery experience and/or mobile application, including account balance display, payment processing workflow, and receipt generation. Demonstrate staff acceptance of credit or debit card payments at a service desk and related reporting capabilities, if available.

#### Mobile:

- Install or access the mobile experience
- Sign in to a patron account
- Display a digital library card
- Place and manage holds
- Renew checked-out materials
- Access digital content
- Receive notifications
- Save searches and create reading lists
- Locate library locations and hours
- Demonstrate accessibility features

#### Consortium Administration:

- Demonstrate how the proposed solution supports a federated library consortium
- Demonstrate system-wide administrative functions available to VLS
- Demonstrate library-level administrative functions available to member libraries
- Demonstrate how permissions are assigned and managed
- Demonstrate how local configuration changes are isolated from other libraries

- Demonstrate administrative controls for the ILS, discovery, and mobile experience
- Identify any functions that cannot be delegated to member libraries
- Demonstrate how local library staff may access library-specific reports without access to consortium-wide administrative functions

### **3.5.1 Evaluation Environment**

VLS may invite one or more finalist vendors to participate in additional evaluation activities beyond formal demonstrations.

Finalist vendors may be requested to provide temporary access to a hosted trial, sandbox, test, or demonstration environment for evaluation by VLS headquarters staff and participating member libraries.

The evaluation environment should allow authorized users to perform representative workflows and assess system usability, functionality, and administrative capabilities. Evaluation activities may include, but are not limited to:

- Circulation transactions
- Patron registration and account management
- Cataloging and holdings maintenance
- Reporting and analytics
- Discovery experience and website management functions
- Mobile application functionality
- Online payment workflows
- Consortium and local administrative functions

Vendors should describe the availability of evaluation environments, anticipated duration of access, available permission levels, and any limitations associated with trial use.

Feedback collected from VLS staff and participating member libraries during demonstrations and evaluation activities may be considered as part of the final vendor selection process.

## **4.0 Proposal Format and Instructions**

### **4.1 Proposal Format**

To facilitate the analysis of responses to this RFP, bidders are required to prepare their proposals in accordance with the instructions outlined in this section.

VLS may make such investigations it deems necessary to determine the ability of the bidder to perform the work proposed. Conditional proposals will not be accepted.

Proposals should be prepared as simply as possible and provide a straightforward concise description of the bidder's capabilities to satisfy the requirements of the RFP.

Emphasis should be on accuracy, completeness, and clarity of content. All parts, pages, figures, and supplements should be numbered and clearly labeled. The proposal should be organized into the following major sections:

Title Page

Letter of Transmittal

Table of Contents

- 1.0 Executive Summary
- 2.0 Company Background and Experience
- 3.0 Proposed Software and Computing Environment
  - A. General Solution Information (Applies to all Proposed Products)
  - B. Consortium Administration Information
  - C. ILS Solution Information
  - D. Discovery and Mobile Solution Specific Information
- 4.0 Optional Software
- 5.0 Responses to General, Consortium Administration, Discovery and Mobile Capabilities
- 6.0 Implementation Services
- 7.0 Project Management
- 8.0 Data Conversion and Migration
- 9.0 System Administration and Security Management
- 10.0 Training
- 11.0 Support Program

- 12.0 Client References
- 13.0 Pricing Summary
- 14.0 Data Ownership, Portability and Exit Strategy
- 15.0 Additional Information

Instructions relative to each part of the response to this RFP are defined in the remainder of this section.

**LETTER OF TRANSMITTAL:** 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 letter shall provide the name, title, address, and telephone number of the vendor as well as the name, title, address, and telephone number of the executive that has the authority to contract with VLS.

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 VLS, 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 VLS as to any material facts”.

The letter of transmittal must identify the person to whom all further correspondence and/or questions should be addressed. Include the person’s email address and telephone number.

**EXECUTIVE SUMMARY:** Provide a brief narrative highlighting the proposal. The summary should contain as little technical jargon as possible, should be oriented toward non-technical personnel, and be no more than three (3) pages in length. The summary should include a proposed total cost for the project and a brief summary of that cost, highlights of unique or superior aspects of the proposal. If available, include the project team and their responsibilities.

**COMPANY BACKGROUND AND EXPERIENCE:**

- A. Provide a brief description of your company including the name(s) of its owners and/or principal officers, date of origin and/or incorporation, length of time in the library automation industry, and length of time supporting the product being bid in response to this RFP.

Provide answers to the following for all proposed vendors, including third party vendors:

- B. How many full-time employees work for your company?

- C. What is the percentage breakdown of staff among sales, research and development, support and other vendor functions?
- D. Identify the number and location of support personnel accessible to VLS.
- E. If your company is currently for sale or involved in any transactions to expand or be acquired by another organization, explain.
- F. If your company has been involved in a reorganization, acquisition, or merger in the last three years, explain.
- G. If your company has been involved in the last three years in public litigation with a client or a third-party vendor related to the product that is being bid in response to this RFP, explain.
- H. What percentage of the bidder's business make up differing types of libraries?
- I. Also include any sub-bidders in this section along with contact information for each.
- J. Describe your company's experience in providing automation services to public libraries. Be specific.
- K. Describe your position in the ILS marketplace.
- L. Describe your company's commitment to product development in the last three years.
- M. How does your company actively participate in the development and use of industry standards.

VLS at its option may require a bidder to provide additional support and/or clarify requested information.

#### **PROPOSED SOFTWARE AND COMPUTING ENVIRONMENT:**

Provide answers to the following:

##### **A. General Solution Information (Applies to All Proposed Products):**

###### **A.1 Solution Overview**

List the products included in the solution that you will bid in response to this RFP. Identify whether the product is ILS, discovery, mobile, or supporting software. Identify whether each is native, third-party, or subcontracted.

###### **A.2 Hosting and Infrastructure**

Describe the hosting architecture, maintenance approach, system availability commitments, upgrade methodology, and release schedule for each proposed product.

- State the dates of the last three major releases
- Identify products not yet in general release

#### **A.4 Security and Cybersecurity**

Describe cybersecurity compliance and provide supporting documentation, including:

- SOC 2 Type II, ISO 27001, or equivalent assessments, if available
- Security monitoring and incident response procedures
- Data encryption practices
- Multi-factor authentication capabilities
- Breach notification procedures
- Disaster recovery and business continuity practices
- Any material cybersecurity incidents affecting the proposed solution within the past three years

#### **A.5 Data Ownership and Privacy**

Describe data ownership, portability, export capabilities, and data retention policies applicable to each proposed product.

#### **A.6 Integration Architecture**

Describe the integration architecture for the proposed solution, including available APIs, SIP, NCIP, authentication methods, and major third-party integrations.

#### **A.7 Customer Community and Product Governance**

Describe how customers participate in product enhancement and development decisions, including:

- User groups
- Advisory boards
- Product councils
- Enhancement request processes
- Voting or prioritization mechanisms for future development
- Frequency of customer conferences or user meetings

#### **A.8 Support Model**

Identify support responsibilities for each proposed product and any third-party support relationships.

#### **A.9 Artificial Intelligence and Automated Functionality**

Respondents shall identify any artificial intelligence (AI), machine learning, predictive analytics, recommendation engines, automated content generation, automated cataloging, conversational interfaces, or other AI-assisted functionality included in, integrated with, or planned for the proposed ILS, discovery, and/or mobile solution.

For each identified capability, respondents shall:

- Describe the functionality and intended use cases
- Identify whether the capability is currently available, optional, or planned for future release
- Identify any third-party AI services, models, or providers utilized
- Describe how patron, bibliographic, circulation, or other library data may be used by AI-related features
- Describe privacy, data retention, and security controls applicable to the feature
- Identify any configuration options allowing VLS to enable, disable, or restrict the functionality
- Describe any additional costs associated with AI-enabled features
- Identify whether any customer data submitted to AI-related services is used to train vendor-owned or third-party AI models

#### **A.10 Future Product Development**

For each proposed product in the solution, provide the product roadmap and information regarding planned enhancements over the next twenty-four (24) months. Identify any major functionality currently under development that is expected to materially impact functionality, administration, integrations, discovery, accessibility, mobile experience, security, reporting, or artificial intelligence capabilities.

### **B. Consortium Administration**

Describe how the proposed solution satisfies the consortium administration requirements identified throughout this RFP, including centralized administration, delegated permissions, and local library autonomy.

### **C. ILS Solution Information**

#### **C.1 ILS Product Description**

Provide an overview of the proposed ILS and identify any significant differentiators, unique functionality, separately licensed modules, or third-party products required to deliver the proposed solution.

## **C.2 Bookmobile Operations and Offline Circulation**

VLS operates a bookmobile serving multiple scheduled stops. Respondents shall describe how the proposed solution supports these workflows, including:

- Offline circulation functionality during internet outages or service disruptions
- Procedures for synchronizing transactions once connectivity is restored.
- Circulation tracking and statistical reporting by individual bookmobile stop
- Alternatives to maintaining separate location codes for each stop
- Existing public library customers using similar bookmobile workflows
- Any limitations or constraints associated with the proposed approach

## **C.3 Migration from Horizon**

VLS currently utilizes SirsiDynix Horizon. Respondents shall:

- Describe experience migrating libraries from SirsiDynix Horizon.
- Identify the number of Horizon migrations completed.
- Provide examples of public libraries or consortia that have migrated from Horizon to the proposed solution.
- Describe migration tools and utilities utilized during the conversion process.
- Identify any Horizon data elements, functionality, workflows, or historical data that cannot be fully converted to the proposed solution.

## **C.4. RFID Support**

Describe RFID capabilities and integrations supported by the proposed solution, including:

- Self-check equipment
- Staff circulation workflows
- Inventory devices
- Automated materials handling (AMH)
- Security gates
- Supported RFID vendors
- Required protocols (SIP2, NCIP, APIs, etc.)
- Any additional licensing, hardware, or implementation requirements

**D. Discovery and Mobile Experience Specific Information:**

**D.1 Discovery Experience Overview**

Provide an overview of the proposed discovery experience, including key differentiators and any separately licensed or third-party components.

**D.2 Mobile Solution Overview**

Provide an overview of the proposed mobile experience, including key differentiators and any separately licensed or third-party components

**OPTIONAL SOFTWARE:** Include a description of any products, features or other value-added components available for use with the proposed software application(s) that have not been specifically requested in this RFP. Consideration of these products will be given where these may be of value to VLS.

**RESPONSES TO CAPABILITIES:**

The following capability matrices are organized into four categories: ILS Solution Capabilities, Discovery Experience Capabilities, Mobile Experience Capabilities, and Consortium Administration Capabilities. Requirements identified as Mandatory must be available at implementation through standard product functionality or configuration. Responses should address the proposed solution as configured for VLS. The bidder must provide responses to each of the desired capabilities listed below.

The following codes should be used for the compliance column. The comment box is provided for additional information.

F=Fully meets capability

N=This feature cannot be provided

M=Modification (please note cost)

T=Third party software

W=Work around (describe in notes)

A=Available in next version (include estimate date of release)

Importance Level Key:

**Mandatory:** Must be available at implementation or through standard configuration

**Highly Desired:** Strongly preferred functionality that will be weighted favorably during evaluation.

**Desired:** Functionality that provides additional value but is not required.

## GENERAL SOLUTION CAPABILITIES (Applies to All Proposed Products)

| Capability                                                                                                                               | Importance     | Compliance | Notes/Comments |
|------------------------------------------------------------------------------------------------------------------------------------------|----------------|------------|----------------|
| Vendor hosted solution (SAAS) Software as a Service                                                                                      | Mandatory      |            |                |
| SAAS uptime commitment of 99.5% or greater                                                                                               | Mandatory      |            |                |
| Published outage notification procedures                                                                                                 | Mandatory      |            |                |
| Defined incident severity classifications                                                                                                | Mandatory      |            |                |
| Emergency support available outside normal business hours                                                                                | Mandatory      |            |                |
| Data encryption at rest                                                                                                                  | Mandatory      |            |                |
| Data encryption in transit                                                                                                               | Mandatory      |            |                |
| Disaster Recovery Program                                                                                                                | Mandatory      |            |                |
| Data ownership and export rights                                                                                                         | Mandatory      |            |                |
| Incident notification procedures                                                                                                         | Mandatory      |            |                |
| Multi-factor authentication                                                                                                              | Highly Desired |            |                |
| Annual security testing                                                                                                                  | Highly Desired |            |                |
| Vendor provides current SOC 2 Type II, ISO 27001 certification, or equivalent independent security assessment documentation upon request | Highly Desired |            |                |
| Vendor maintains a documented incident response and breach notification process                                                          | Mandatory      |            |                |
| The system shall support existing barcode schemes for patrons and library materials and shall permit configurable                        | Mandatory      |            |                |

|                                                                                                                                               |           |  |  |
|-----------------------------------------------------------------------------------------------------------------------------------------------|-----------|--|--|
| barcode formats, prefixes, lengths, and validation rules without requiring replacement of existing barcodes.                                  |           |  |  |
| APIs for the OverDrive, Ebooks Minnesota, etc. (as applicable)                                                                                | Mandatory |  |  |
| Vendor shall identify all fees associated with data extraction, migration assistance, or termination services (as applicable)                 | Mandatory |  |  |
| Vendor shall certify destruction of VLS data following successful transition to a successor system and completion of agreed retention periods | Mandatory |  |  |

## CONSORTIUM ADMINISTRATION CAPABILITIES

| Capabilities                                                                                     | Importance | Compliance | Notes/Comments |
|--------------------------------------------------------------------------------------------------|------------|------------|----------------|
| Supports a federated consortium model with centralized administration and library-level autonomy | Mandatory  |            |                |
| Granular role-based security allowing VLS to restrict system-wide functions to designated staff  | Mandatory  |            |                |
| Library-specific configuration that can be managed without affecting other member libraries      | Mandatory  |            |                |
| VLS headquarters staff can access, analyze, export, and report on                                | Mandatory  |            |                |

|                                                                                                                                                                                                                                                                                                                                                                                     |           |  |  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|--|--|
| consortium-wide data through reporting tools, APIs, data exports, or other supported methods.                                                                                                                                                                                                                                                                                       |           |  |  |
| Separate administrative permissions for ILS, discovery experience, and mobile experience                                                                                                                                                                                                                                                                                            | Mandatory |  |  |
| Ability to delegate administrative responsibilities to designated member library staff without granting consortium-wide administrative privileges                                                                                                                                                                                                                                   | Mandatory |  |  |
| Member libraries shall be able to independently manage local circulation policies, including loan periods, renewal limits, hold settings, fine and fee structures, overdue notice schedules, collection codes, and patron registration rules without affecting the policies of other member libraries, except where restrictions are intentionally established by VLS headquarters. | Mandatory |  |  |
| Supports delegated payment administration, allowing member libraries to manage local payment functions and settings while restricting access to consortium-wide payment configurations                                                                                                                                                                                              | Mandatory |  |  |

|                                                                                                                                                                                                                                                                                                                                                                                                                             |           |  |  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|--|--|
| The system shall support hierarchical administration that enables VLS headquarters staff to establish consortium-wide policies, standards, and permissions while permitting member libraries to maintain local control over authorized settings and workflows.                                                                                                                                                              | Mandatory |  |  |
| VLS headquarters staff shall have full access to all bibliographic, authority, item, and holdings records. Member library cataloging staff shall be permitted to create bibliographic and authority records, maintain and withdraw local holdings, and perform collection maintenance activities for their own collections, but shall not be able to edit or delete holdings or records belonging to other member libraries | Mandatory |  |  |
| Provides VLS headquarters administrative staff the ability to create, schedule, save, and run consortium-wide reports across all member libraries, while allowing member libraries to create, schedule, save, and run reports limited                                                                                                                                                                                       | Mandatory |  |  |

|                                                                                                                                                               |                |  |  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|--|--|
| to data for their own library or authorized branches                                                                                                          |                |  |  |
| Supports shared report templates that may be created by VLS headquarters and distributed to member libraries for local use and modification                   | Highly Desired |  |  |
| Supports ad hoc, scheduled, and exportable reporting at consortium, library, collection, patron, circulation, acquisitions, and financial transaction levels. | Highly Desired |  |  |
| Audit logs of administrative changes                                                                                                                          | Highly Desired |  |  |

## ILS SOLUTION SPECIFIC CAPABILITIES

| Capability                                                                                                                                                                                       | Importance     | Compliance | Notes/Comments |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|------------|----------------|
| ISO-compliant full NCIP functionality to work with Statewide ILL MNLINK                                                                                                                          | Mandatory      |            |                |
| Z39.50 for ILL                                                                                                                                                                                   | Mandatory      |            |                |
| SIP2 Connections, including OverDrive, PC/Print management, etc.                                                                                                                                 | Mandatory      |            |                |
| Supports RFID-based circulation, inventory, self-check, materials handling, and security workflows through industry-standard protocols and integrations with commercially available RFID systems | Highly Desired |            |                |

|                                                                                                                                                                                                                          |                |  |  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|--|--|
| Supports a native patron self-checkout interface deployable on a standard Windows workstation using a barcode scanner and optional receipt printer without requiring separately licensed third-party self-check software | Highly Desired |  |  |
| Circulation Module                                                                                                                                                                                                       | Mandatory      |  |  |
| Cataloging Module                                                                                                                                                                                                        | Mandatory      |  |  |
| Acquisitions Module                                                                                                                                                                                                      | Highly Desired |  |  |
| Serials Management                                                                                                                                                                                                       | Mandatory      |  |  |
| Web-based Circulation                                                                                                                                                                                                    | Highly Desired |  |  |
| Supports integrated credit/debit card payment processing at library service desks within staff workflows                                                                                                                 | Highly Desired |  |  |
| Web-based Cataloging                                                                                                                                                                                                     | Highly Desired |  |  |
| Inventory Management System                                                                                                                                                                                              | Mandatory      |  |  |
| Supports offline circulation when internet connectivity is unavailable                                                                                                                                                   | Mandatory      |  |  |
| Reporting and Analytics                                                                                                                                                                                                  | Mandatory      |  |  |
| Test Server Environment                                                                                                                                                                                                  | Mandatory      |  |  |
| Seamlessly send patron notices via phone, email, and/or SMS for hold ready, pre-overdue, overdue, etc.                                                                                                                   | Mandatory      |  |  |
| Automatic renewal of items that do not have holds                                                                                                                                                                        | Highly Desired |  |  |
| VLS retains ownership of all: <ul style="list-style-type: none"> <li>• Bibliographic</li> <li>• Item</li> </ul>                                                                                                          | Mandatory      |  |  |

|                                                                                                                                                                                                      |                |  |  |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|--|--|
| <ul style="list-style-type: none"> <li>• Patron</li> <li>• Circulation, and</li> <li>• Transactional data</li> </ul> <p>And must be able to export data in non-proprietary formats upon request.</p> |                |  |  |
| Vendor shall provide a complete data extract upon contract termination, including bibliographic, item, patron, circulation, acquisitions, authority, and configuration data                          | Mandatory      |  |  |
| Ability to run unattended nightly backups of the system                                                                                                                                              | Mandatory      |  |  |
| Ability to do large batch record changes of bibs without having to export, edit, and reimport                                                                                                        | Highly Desired |  |  |
| Tolerates momentary network interruptions                                                                                                                                                            | Mandatory      |  |  |
| Compatible with Windows 11                                                                                                                                                                           | Mandatory      |  |  |

## DISCOVERY EXPERIENCE CAPABILITIES

| Capabilities                                                                                                               | Importance | Compliance | Notes/Comments |
|----------------------------------------------------------------------------------------------------------------------------|------------|------------|----------------|
| Supports delegated discovery administration consistent with consortium administration permissions and governance policies. | Mandatory  |            |                |
| Discovery interface is fully responsive and optimized for mobile web browsers                                              | Mandatory  |            |                |
| Faceted searching                                                                                                          | Mandatory  |            |                |

|                                                                                                                                                                                                 |                |  |  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|--|--|
| Search relevance ranking                                                                                                                                                                        | Mandatory      |  |  |
| Supports series-aware discovery, including searching by series name, display of series order when available and identification of related titles within a series                                | Highly Desired |  |  |
| Patron account management                                                                                                                                                                       | Mandatory      |  |  |
| Hold placement and renewal                                                                                                                                                                      | Mandatory      |  |  |
| Integration with Ebooks Minnesota                                                                                                                                                               | Mandatory      |  |  |
| Integration with OverDrive/Libby                                                                                                                                                                | Mandatory      |  |  |
| Supports management and display of electronic resources, including OverDrive, Libby, Ebooks Minnesota, databases, streaming services, and future electronic resource providers.                 | Mandatory      |  |  |
| Accessibility compliance: <ul style="list-style-type: none"> <li>• WCAG 2.1 AA or higher compliance statement</li> <li>• VPAT documentation</li> <li>• Accessibility contact process</li> </ul> | Mandatory      |  |  |
| API availability                                                                                                                                                                                | Mandatory      |  |  |
| Supports secure online payment of fines, fees, and other patron charges through the discovery experience, including integration                                                                 | Highly Desired |  |  |

|                                                                                                                                                                                                                                                                             |                |  |  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|--|--|
| with payment processors, automatic posting to patron accounts, and receipt generation.                                                                                                                                                                                      |                |  |  |
| Reading recommendations                                                                                                                                                                                                                                                     | Highly Desired |  |  |
| User reviews and lists                                                                                                                                                                                                                                                      | Highly Desired |  |  |
| Community engagement features                                                                                                                                                                                                                                               | Highly Desired |  |  |
| Multilingual support                                                                                                                                                                                                                                                        | Mandatory      |  |  |
| Event integration                                                                                                                                                                                                                                                           | Highly Desired |  |  |
| Custom branding and design control                                                                                                                                                                                                                                          | Highly Desired |  |  |
| Usage analytics                                                                                                                                                                                                                                                             | Highly Desired |  |  |
| Ability for the discovery experience to serve as the primary public website for a member library. Member library staff shall be able to create and maintain heir library's website content and profile pages without access to content belonging to other member libraries. | Highly Desired |  |  |

## MOBILE EXPERIENCE CAPABILITIES

| Capabilities                                                                                                                        | Importance | Compliance | Notes/Comments |
|-------------------------------------------------------------------------------------------------------------------------------------|------------|------------|----------------|
| Supports delegated mobile application administration consistent with consortium administration permissions and governance policies. | Mandatory  |            |                |
| Mobile experience is optimized for smartphones and tablets                                                                          | Mandatory  |            |                |

|                                                                                                                                                                                                 |                |  |  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|--|--|
| Dedicated mobile app                                                                                                                                                                            | Highly Desired |  |  |
| IOS support                                                                                                                                                                                     | Mandatory      |  |  |
| Android support                                                                                                                                                                                 | Mandatory      |  |  |
| Patron mobile self-checkout                                                                                                                                                                     | Desired        |  |  |
| Staff mobile circulation                                                                                                                                                                        | Desired        |  |  |
| Digital library card display                                                                                                                                                                    | Highly Desired |  |  |
| Barcode display for checkout                                                                                                                                                                    | Highly Desired |  |  |
| Account management                                                                                                                                                                              | Mandatory      |  |  |
| Hold placement and cancellation                                                                                                                                                                 | Mandatory      |  |  |
| Renewals                                                                                                                                                                                        | Mandatory      |  |  |
| Mobile notifications                                                                                                                                                                            | Highly Desired |  |  |
| Push notifications                                                                                                                                                                              | Highly Desired |  |  |
| Supports patron account balances, online payment of fines and fees, automatic posting of payments, and receipt generation through the mobile application.                                       | Highly Desired |  |  |
| Self-check integration                                                                                                                                                                          | Desired        |  |  |
| Digital content access                                                                                                                                                                          | Mandatory      |  |  |
| Saved searches and reading lists                                                                                                                                                                | Highly Desired |  |  |
| Accessibility compliance: <ul style="list-style-type: none"> <li>• WCAG 2.1 AA or higher compliance statement</li> <li>• VPAT documentation</li> <li>• Accessibility contact process</li> </ul> | Mandatory      |  |  |
| Multilingual support                                                                                                                                                                            | Highly Desired |  |  |
| Custom branding                                                                                                                                                                                 | Desired        |  |  |
| Event and program integration                                                                                                                                                                   | Desired        |  |  |

|                                                                    |           |  |  |
|--------------------------------------------------------------------|-----------|--|--|
| Digital library card compatibility with Apple Wallet/Google Wallet | Desired   |  |  |
| Library location and hours integration                             | Mandatory |  |  |

**IMPLEMENTATION SERVICES:** Describe the overall approach to providing the services specified in this RFP, including a description of implementation milestones (including data migration, testing and end-user training). Respondents shall describe their approach to system testing, user acceptance testing, defect remediation, go-live readiness review, and final system acceptance. The proposer shall provide a detailed migration methodology that includes data assessment, record cleanup, normalization, deduplication, testing, validation, and final migration activities. The proposer shall clearly identify vendor and VLS responsibilities for each phase of the migration process.

**Implementation and Migration Services Functional Requirements Matrix:**

| Capability                                                                                                                                                                                                                                                                                                                                    | Required/Desired |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| Conduct pre-migration data assessment of bibliographic, item, patron, authority, acquisitions, serials, and circulation data                                                                                                                                                                                                                  | Required         |
| Identify data quality issues, duplicate records, obsolete codes, and records that may negatively affect migration                                                                                                                                                                                                                             | Required         |
| Provide recommendations for data cleanup and normalization prior to migration                                                                                                                                                                                                                                                                 | Required         |
| Perform standard data normalization and deduplication services included in the base proposal                                                                                                                                                                                                                                                  | Required         |
| Identify any optional data cleanup services and associated costs                                                                                                                                                                                                                                                                              | Required         |
| Conduct one or more test migrations and provide data validation reports documenting migration accuracy and completeness                                                                                                                                                                                                                       | Required         |
| Assist staff in mapping legacy codes, locations, patron types, and circulation policies to the proposed system.                                                                                                                                                                                                                               | Required         |
| Migrate and retain existing patron records, including patron barcode numbers, contact information, borrower categories, account status, library affiliations, fines and fees, current holds, current checkouts, and other patron account data necessary to maintain continuity of service. Reissuance of library cards shall not be required. | Required         |
| Provide a data migration inventory identifying all patron, bibliographic, authority, item, holdings, circulation, acquisitions, and configuration data elements to be migrated, including identification of any data elements that cannot be fully converted.                                                                                 | Required         |

**DATA CONVERSION AND MIGRATION:** Describe experience migrating data from Horizon version 7.6.1 with SQL. 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. Respondents shall describe how patron records, patron barcode numbers, account statuses, current checkouts, holds, fines and fees, bibliographic records, authority records, item records, holdings records, and historical circulation data will be retained and migrated to the proposed solution. Any data elements that cannot be migrated shall be clearly identified. Vendor shall provide a post-migration reconciliation report comparing source and destination record counts for bibliographic, item, patron, authority, acquisitions, and circulation records.

**PROJECT MANAGEMENT:** Provide a description of your project management methodology and the project management approach to be utilized for this project. This should include a description of the vendor's standard approach to, at a minimum, the following: schedule management, status reporting, risk and issue management, communication, and change management. Based on the information provided in this solicitation, provide a preliminary project schedule reflecting milestones.

**SYSTEM ADMINISTRATION AND SECURITY ACCESS REQUIREMENTS:** **Describe the administrative tools used to manage staff access.** VLS requires a role-based security and permissions framework that supports a federated library environment with centralized administration and local library autonomy. Describe the level of granularity a system administrator has in assigning user access, privileges and preferences based on characteristics such as job roles and functions in a library. Describe how much customization control a staff member with administrative rights would have.

**TRAINING:** Describe your proposed training approach for VLS, including but not limited to, responsibilities of both the vendor and VLS staff as it relates to training and roles. 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.

**SUPPORT PROGRAM AND SERVICE LEVELS:** Describe how support will be provided post-system go-live. Include support methods, support hours, escalation procedures, customer portal functionality, and communication methods.

Vendors shall provide their standard Service Level Agreement (SLA) and identify any service levels that would be incorporated into a final contract.

Reference cybersecurity materials previously provided in Section A.4 and identify any additional information relevant to support operations.

Respondents shall specifically provide:

- Guaranteed system uptime commitments
- Scheduled maintenance procedures
- Advance notification procedures for outages and maintenance
- Incident severity classifications
- Response time commitments by severity level
- Resolution or workaround targets by severity level
- Escalation procedures
- Service credits or remedies available for missed service levels
- Support hours and after-hours emergency support availability
- Product update and release management processes

**CLIENT REFERENCES:** List at least 2 public library systems of similar size and characteristics to VLS that are currently using the proposed solution: ILS, discovery and mobile solution with emphasis on library systems operating in Minnesota. Identify a central contact person for each reference, including name, address, telephone number, and email address.

**PRICING SUMMARY:** Respondents shall provide separate itemized pricing for the ILS, discovery, and mobile components. VLS reserves the right to evaluate and award any component independently.

Provide a detailed and itemized pricing proposal for all software, licenses, subscriptions, hosting, implementation services, training, data migration, support, maintenance, APIs, integrations, discovery experience products, mobile applications, and any other services being proposed. All costs associated with third-party products, integrations, subscriptions, hosting services, implementation services, APIs, support agreements, and future recurring charges must be separately identified and itemized.

VLS anticipates entering into an initial contract term of five (5) years with optional renewal periods.

Vendors shall provide pricing by contract year, including:

- Year 1 pricing

- Year 2 pricing
- Year 3 pricing
- Year 4 pricing
- Year 5 pricing
- Total five-year cost of ownership

Pricing shall clearly distinguish:

- One-time implementation costs
- Data migration and conversion costs
- Training costs
- Annual subscription, hosting, maintenance, and support costs
- Third-party licensing and service costs
- Optional products and services to meet solution goals, including but not limited to:
  - RFID related
  - PC-based self-checkout solution
  - Acquisitions
  - Serials control
- Transaction-based, usage-based, API, SMS, or other variable fees
- Costs associated with future modules or functionality required to achieve requirements identified in this RFP

Provide pricing in a single summary table\*. For example:

| <b>Cost Category</b>  | <b>Year 1</b> | <b>Year 2</b> | <b>Year 3</b> | <b>Year 4</b> | <b>Year 5</b> |
|-----------------------|---------------|---------------|---------------|---------------|---------------|
| ILS                   |               |               |               |               |               |
| Discovery Experience  |               |               |               |               |               |
| Mobile App            |               |               |               |               |               |
| Hosting               |               |               |               |               |               |
| Support & Maintenance |               |               |               |               |               |
| Training              |               |               |               |               |               |
| Data Migration        |               |               |               |               |               |
| Optional Services     |               |               |               |               |               |
| <b>Total</b>          |               |               |               |               |               |

\*This table is illustrative only and does not limit the level of pricing detail required.

Vendors shall clearly identify all assumptions used in developing pricing and disclose any costs not included in the proposed solution. Respondents shall identify any anticipated annual price increases, escalation provisions, or discounts associated with longer contract commitments.

Implementation fees should be rolled into pricing for the entire length of the contract. Pricing shall remain valid for at least ninety (90) days following the proposal due date.

VLS reserves the right to evaluate proposals based on total cost of ownership, including all implementation, licensing, hosting, support, maintenance, third-party products, and recurring costs over the anticipated contract term.

**DATA OWNERSHIP, PORTABILITY AND EXIT STRATEGY:** Respondents shall describe their policies and procedures related to ownership, access, portability, retention, and return of data. Vendors shall specifically address:

- Ownership of bibliographic, item, patron, circulation, acquisitions, authority transactional, and configuration data
- Available data export formats
- Frequency and methods of data extraction
- Access to data during the contract term
- Assistance provided during transition to a successor system
- Expected timelines for providing final data exports
- Costs associated with data extraction, migration assistance, or transition services
- Data retention periods following contract termination
- Procedures for secure deletion of VLS data
- Cybersecurity roadmap
- Accessibility roadmap

**ADDITIONAL INFORMATION:** Bidders may use this section to include additional information about their products and services not covered in other sections of the proposal.

Examples could include:

- Newsletters
- Conference information
- Documentation

**ACKNOWLEDGEMENT:** Development of this RFP was informed in part by the Southeastern Libraries Cooperating (SELCO) 2024 Integrated Library System Request for Proposals and other public-sector procurement resources. Portions of the RFP have been adapted, modified, reorganized, and expanded to reflect the operational, administrative, and strategic requirements of Viking Library System (VLS). Microsoft Copilot was used as a

drafting and editing tool to assist with content organization, synthesis of requirements, language refinement, readability improvements, and document review. All final content, requirements, evaluation criteria, and procurement decisions were reviewed and approved by Viking Library System.