

**REQUEST FOR PROPOSAL**  
**for an**  
**Open Source Software Statewide Resource Sharing System**

**1.0 Overview**

1.1 Purpose

This Request for Proposal (RFP) is issued by OHIONET on behalf of a multistate collaborative. The multistate collaborative (hereafter referred to as the Collaborative) has funds available to acquire the System selected based on this RFP process. OHIONET and the Collaborative are responsible for the evaluation and selection of the system. It is anticipated that one contract will be signed to provide the system for OHIONET and the Collaborative.

This RFP specifies the system requirements for a statewide resource sharing system. Although it is assumed that most, if not all, partners of the Collaborative will eventually implement and manage this SWRS software, OHIONET and the State Library of Ohio have agreed to be the initial implementer. Therefore for purposes of convenience, all references in this RFP to implementation of the SWRS system shall include either OHIONET and the State Library of Ohio or "central site."

The broad vision of the project, as stated at a Statewide Resource Sharing Summit meeting on December 2, 1998, is still valid, i.e. "Anyone, anywhere, at any time can borrow anything from any other Ohio Library." Because of centralized state funding, there are fewer economic barriers to effective resource sharing in Ohio.

The following are basic assumptions and desired features for the system:

1. The system shall employ a web interface and utilize web access
2. A virtual circulation system and online catalog may be created through the use of Z39.50 capabilities or a physical union catalog may be created for the purposes of resource sharing.
3. Each patron using the system for resource sharing must be authenticated. It is anticipated that each user will be directly associated with their "home" library.
4. While primarily concerned with physical document delivery (e.g., "ILL"), the system shall also support the delivery of electronic texts and the requesting of photocopies and other "non-returnables".
5. The system shall allow some degree of mediation either at the borrowing library and/or the lending library. However, the system is intended to be as non-mediated as possible.
6. The requesting portion of the system is viewed as an extension of the circulation model rather than an augmentation of the ILL model.

7. The system shall have the potential to include all types of libraries.
8. The system shall be capable of coordinating with or interfacing with the State's land-based delivery service.
9. The system shall be in compliance with major standards (esp. ISO 10160/10161, SIP/SIP2/NCIP, MARC).
10. The system shall provide a single interface which allows a user to gain access to a wide variety of catalogs, databases, applications, and systems.
11. The system shall be developed and released under an open source software license, such as the GNU General Public License (GPL), for the purposes of allowing free distribution of the software. If an alternate to the GPL is proposed, the Collaborative must agree in writing to the license model specified prior to development.
12. The system shall be easy to use without instruction by anyone familiar with the Internet.
13. The system shall interface with existing library automation systems in Ohio's libraries.
14. The system shall track all resource sharing activity and be capable of generating statistics for both the statewide system and local, individual libraries.
15. It is assumed that libraries will minimally have access to the Internet and web and that the libraries will have an Internet accessible online catalog and circulation system.
16. It is assumed that libraries will participate in the document delivery system in order to use the resource sharing system.
17. The system shall be capable of serving all registered library patrons.

### 1.2 RFP Objectives

The objectives of the RFP are:

- 1.2.1 To define the specifications for a System to meet the functional and content requirements outlined in this RFP
- 1.2.2 To solicit price quotations and bids from Vendors to provide the System

### 1.3 RFP Timetable

Collaborative comments due to State Library	December 4, 2008
Revised RFP distributed to Collaborative	December 9, 2008
Final comments from Collaborative	December 11, 2008
Release the RFP	December 15, 2008
Vendor Inquiry Begins	December 16, 2008
Vendor Inquiry Ends	January 29, 2009
Vendor Proposals Due	January 30, 2009
Evaluation of Proposals	February 2-13, 2009
Vendor Presentations	February 16-20, 2009
Selection of System/Vendor	March 2, 2009

Contract Negotiations	Immediately after selection
Contract Signing	March 9, 2009
Test System is Available	September 1, 2009
Migration from current system to new	February 2010

The State Library recognizes that this timetable may require modification. However, the intent is to make the selected System available no later than January 2010. Any vendor that cannot meet this schedule for System availability with a substantial number of requirements met (see section 1.18 Evaluation of the Vendor Responses) should not respond to this RFP.

#### 1.4 Background

OHIONET and the Collaborative recognize that a critical component of the Statewide Resource Sharing network is the delivery component. Once a library customer uses the technological interface to identify and request materials, a statewide delivery service will physically move the materials from the lending library to the requesting library.

Additional background information about the State Library's Statewide Resource Sharing Project is available at:

<http://www.library.ohio.gov/swrs/swrs-nextgen.html>

#### 1.5 RFP Organization

This RFP is organized in eleven sections, followed by five (5) attachments.

- Section 1.0 Overview
- Section 2.0 Format for Vendor Response
- Section 3.0 Functional Specifications: Authentication
- Section 4.0 Functional Specifications: Patron Interface
- Section 5.0 Functional Specifications: Library Functions
- Section 6.0 Functional Specifications: System Functions
- Section 7.0 Management & Support
- Section 8.0 Training and Documentation
- Section 9.0 Plans for Development
- Section 10.0 Evaluation of Process
- Section 11.0 Terms and Conditions

#### Attachments:

- A. Ohio Public Library Automation Vendors
- B. Ohio Consortia Defined
- C. Vendor Identification Sheet
- D. Sample Vendor Response Sheet
- E. Cost Sheet

## 1.6 Funding

The following organizations comprise the Collaborative and are providing funding for this initiative

State Library of Ohio  
OHIONET (fiscal agent)  
WiLS – Wisconsin Library Service  
State Library of Iowa  
State Library of Illinois  
State Library of Indiana  
State Library of South Carolina  
State Library of Missouri **[Added to RFP document – January 16, 2009]**

## 1.7 System Description

OHIONET is acting on behalf of the members of the Collaborative. OHIONET and the Collaborative are aware that no System may be able to meet all of the functional capabilities outlined in this RFP's specifications (see 3.0 --9.0). However, the ability to incorporate most of these features and functions into the System is considered an essential criterion for Vendor selection. Additionally, a specific primary essential criterion will be the ability of the system to seamlessly interoperate with the disparate ILSs specified.

## 1.8 Questions and Inquiries

If additional information is necessary to assist the Vendor in interpreting and responding to this RFP, questions will be accepted and responses coordinated by:

David Namiotka  
Director, Information Systems and Technology  
State Library of Ohio  
274 East First Avenue  
Columbus, OH 43201-3692

Phone: (614) 728-4988  
Fax: (614) 387-0600  
Email: [dnamiotka@sloma.state.oh.us](mailto:dnamiotka@sloma.state.oh.us)  
Web: <http://www.library.ohio.gov>

Inquiries regarding this RFP can be made any time during the inquiry period listed in the RFP Timetable. Inquires can be submitted by fax or email. Vendors may contact the State Library to verify that inquiries have been received by phone or email. Responses to all questions will be made available on the RFP web site:

<http://www.library.ohio.gov/swrs/rfp>

When making an inquiry about a specific section of this RFP, please note the specification number and then include any questions or clarification requests.

If sending an inquiry by fax, please include a cover sheet directing the fax to "David Namiotka (re: RESOURCE SHARING RFP)".

The State Library will try to provide responses on the RFP web site to all inquiries within two working days, excluding weekends and State holidays. The identity of vendors submitting inquiries will not be revealed when the response is posted on the web site.

An FAQ will be established recording questions submitted by vendors and responses.

Individual responses will not be provided to the vendor making the inquiry; all responses will be provided via the RFP web site.

#### 1.9 Communication Restriction

From the release of this RFP until a Proposal is selected and a Contract signed, Vendors, including but not limited to their employees, agents, assigns and legal representatives, shall not communicate with any Ohio or Collaborative library staff or representatives (including, but not limited to, OHIONET staff, State Library of Ohio staff, and staff or trustees of any Ohio library) concerning this RFP except through the inquiry method outlined in 1.8. If a Vendor attempts any unauthorized communication, OHIONET and the State Library shall reserve the right to reject that Vendor's proposal.

#### 1.10 Notice of Intent to Respond

To receive further information and updates about this process, a brief letter of intent should be submitted as soon as a Vendor determines that a response will be submitted. The letter may also be faxed or sent electronically. This notice of intent should be sent to:

David Namiotka  
Director, Information Systems and Technology  
State Library of Ohio  
274 East First Avenue  
Columbus, OH 43201-3692

Phone: (614) 728-4988  
Fax: (614) 387-0600  
Email: [dnamiotka@sloma.state.oh.us](mailto:dnamiotka@sloma.state.oh.us)  
Web: <http://www.library.ohio.gov>

### 1.11 Vendor Incurred Expenses

No member of OHIONET and the Collaborative is responsible for any expenses incurred by a Vendor in preparing and submitting a response to this RFP, regardless of whether it awards a contract through this process, decides not to go forward with this project, cancels this RFP for any reason, or contracts for the System through some other process or by issuing another RFP.

### 1.12 Postponement or cancellation of the RFP

OHIONET, acting on behalf of the Collaborative, reserves the right to cancel all or part of this RFP at any time. In addition, the release of this RFP does not imply any commitment to purchase any systems or services from any Vendor.

### 1.13 Confidentiality of Vendor Responses to the RFP

All proposals will be open to public inspection after the Contract has been awarded. All Proposals and other materials will become the property of the OHIONET and may be returned only at OHIONET's option.

However, any proposal that indicates that the majority or entire contents are proprietary may be considered non-responsive. In addition, proposals will be made available to a wide variety of authorized individuals and non-disclosure cannot be guaranteed.

### 1.14 Rules for Modification or Withdrawal of Response

No modifications may be made by Vendors to responses to the RFP after they are submitted. However, any Vendor may withdraw its response at any time.

### 1.15 Time in Effect

Responses and prices quoted are to remain in effect for three (3) months after the due date of the proposal. Therefore, the bids submitted in the Vendor's proposal by the due date of January 30, 2009 must be firm until April 30, 2009.

### 1.16 RFP Evaluation Team

An RFP Evaluation Team has been established to evaluate Vendor responses to this RFP and to make a recommendation to OHIONET and the Collaborative. All Vendor responses will be carefully evaluated and reviewed by the members of this Team.

Representatives from the members of the multi-state collaborative will be included.

Various experts and outside agencies may also be consulted by the RFP Evaluation Team in the evaluation and selection process.

### 1.17 Demonstrations of Systems

The State Library may require selected prospective Vendors to interview with the RFP Evaluation Team, make a presentation about their Proposal, and/or demonstrate their Systems. Such presentations, demonstrations, and interviews provide a prospective Vendor with an opportunity to clarify its Proposal(s) and to ensure a mutual understanding of the Proposal's content. Any presentations, demonstrations, and interviews will be scheduled at the convenience and discretion of the RFP Evaluation Team. However, Vendors should be prepared to make a presentation to the RFP Evaluation Team in Columbus February 16-20, 2009. Exact times and length of presentation will be communicated to selected vendors selected by February 13, 2009. This date is contingent upon timely completion of evaluation of proposals by the RFP Evaluation Team.

### 1.18 Evaluation of Vendor Responses

Each proposal must respond to all of the specifications and requirements included in sections 3.0 through 9.0 of this RFP (see 1.22 for an exception). Some of the specifications are expected to be met by most Vendors while others are desirable. Vendors are to address all specifications. Failure by a Vendor to respond to any specification or requirement may be considered non-responsive to the entire RFP. The State Library is aware that no Vendor may be able to meet all of the specifications presented in sections 3.0 through 9.0.

The State Library's criteria, methodology, and additional details regarding the evaluation of each Vendor's response to this proposal are included in section 10.0 of this RFP.

#### 1.18.1 Vendor Responsibility

Vendors shall carefully review the requirements of this RFP and the contents of its proposal in order to provide sufficient information in their response for complete evaluation. By submitting a Proposal, the Vendor acknowledges that it has read this RFP, understands it, and agrees to be bound by its requirements.

#### 1.18.2 Sources of Information

Responses to the RFP will be the primary source of information used in the evaluation process. Therefore, Vendors are advised to be as complete as possible in their responses. However, OHIONET and the State Library reserve the right to:

1. contact a Vendor to clarify any response;
2. contact any current or past users of a Vendor's system or services; and
3. evaluate the System as available electronically when responses to the RFP are due.

### 1.18.3 OHIONET and The State Library's Rights

In evaluating the responses to the RFP, OHIONET and the State Library also reserve the right to:

1. reject any Proposal that takes exception to the terms and conditions of this RFP, is not in the required format, does not address all of the requirements of this RFP, or that OHIONET and the State Library believes is excessive in price;
2. reject any Proposal that it believes is not in its interests to accept and may decide not to do business with any of the Vendors responding to this RFP;
3. waive any defects in any Proposal or in the submission process followed by a Vendor. However, will only do so if it believes that it is in OHIONET and the State Library's interests and will not cause any material unfairness to other Vendors;
4. accept or reject all or any part of any response, waive minor technicalities, and select a System that best serves the interests of OHIONET and the State Library ; and
5. use any or all of the ideas presented in the proposals without limitation.

In addition, OHIONET and the State Library may cancel this RFP, reject all the Proposals, and seek to acquire the System through a new RFP or other means.

### 1.18.4 RFP System to be Evaluated

It is essential that respondents to this RFP note that the intent of this RFP is to select a System which can be provided by January 2010. Vendors that cannot meet this timetable with a system that meets a substantial number of requirements should not respond.

### 1.19 Contract Negotiations

The final phase of the evaluation process (see 10.0) is contract negotiations. Negotiations will be scheduled and conducted at the convenience of OHIONET and the State Library. The selected vendor must negotiate in good faith.

If the evaluation phase results in a recommendation of one top-ranked Vendor by the RFP Evaluation Team, OHIONET and the Collaborative may limit negotiations to only that Vendor. If negotiations are unsuccessful with the top-ranked Vendor, OHIONET and the State Library may then go down the line of remaining Vendors, as recommended by the RFP Evaluation Team, and negotiate with the next highest-ranked Vendor.

It is entirely within the discretion of OHIONET and the Collaborative whether to permit negotiations. A Vendor must not submit a Proposal assuming that there will be an

opportunity to negotiate any aspect of the Proposal. OHIONET and the State Library are free to limit negotiations to particular aspects of any Proposal, to limit the Vendors with whom OHIONET and the State Library wants to negotiate, or to dispense with negotiations entirely.

#### 1.20 Contract

If this RFP results in a Contract award, the Contract will consist of this RFP, written amendments to this RFP, the Vendor's Proposal, and written, authorized amendments to the Vendor's Proposal. It will also include any materials incorporated by reference in the above documents and any purchase orders issued under the Contract.

#### 1.21 Publicity

No announcement concerning OHIONET and the Collaborative's selection of a Vendor and/or the awarding of a contract as a result of this RFP may be made by the Vendor without prior written approval of OHIONET and the Collaborative. The initial announcement will be made by OHIONET and the Collaborative or its authorized representative.

#### 1.22 Vendor Alliances /Joint Proposals

The stated preference of OHIONET and the Collaborative is to select one vendor who will meet all of the specifications outlined in this RFP. However, OHIONET and the Collaborative realize that, given the scope of the project and the intricacies involved in patron authentication, creating a statewide union or virtual catalog for participating libraries, and supporting patron-initiated borrowing, it may be necessary for vendors to partner together to provide the system that is specified in this RFP.

Therefore, vendors are encouraged to be creative and cooperative in developing partnerships which meet the requirements for effective statewide resource sharing outlined in this RFP. Consequently, partnerships or alliances between two or more vendors to develop and deliver the necessary capabilities are encouraged. However, OHIONET and the Collaborative require a single primary vendor. All partnerships and/or subcontractors must be clearly identified.

A third option is for a vendor to propose meeting one or more, but not necessarily all, of the components in 3.0, 4.0, or 5.0. For example, a vendor could propose providing the authentication component (3.0), but not bid on 4.0 (Patron Interface) or 5.0 (Library Functions). All proposals must include responses to 6.0 through 9.0.

#### 1.23 Multiple or Alternative Proposals

OHIONET and the Collaborative welcome multiple Proposals from a single prospective Vendor, but OHIONET and the Collaborative require each such Proposal to be

submitted separately from every other Proposal the prospective Vendor makes. Additionally, the prospective Vendor must treat every Proposal submitted as a separate and distinct submission and include in each Proposal all materials, information, documentation and other items this RFP requires for a Proposal to be complete and acceptable. No alternative Proposal may incorporate materials from another Proposal made by the prospective Vendor or refer to another Proposal. OHIONET and the Collaborative will judge each alternative Proposal on its own merits.

#### 1.24 Potential Users

As stated previously in Section 1. Overview, OHIONET and the State Library of Ohio have agreed to be the initial implementer of the chosen system.

There are two primary constituencies for this System: any library patron of an Ohio library and library staff. While patron-initiated activities, including use of the system from home by authenticated registered Ohio library users, is the underlying rationale for this project, librarians and library staff will necessarily use the System to manage the overall resource sharing process.

Ohio library patrons can be grouped into 3 general categories. These categories are: public library, academic library, and school (K-12) library patrons.

There are currently 251 public library systems housed in over 700 public library buildings (including main libraries and all branches) in Ohio. These libraries serve all 11.4 million (approximate) residents, with nearly 8.6 million registered users.

OhioLINK, Ohio's public academic library consortium of 90 public and private colleges, universities, and the State Library serves a population of 600,000 students and faculty, in addition to over 60,000 state employees.

INFOhio, the school (K-12) library consortium, has automated nearly 2,394 libraries in 492 school districts while serving 1.1 million students across the state.

#### 1.25 Connectivity to the Internet

Ohio has expended tremendous fiscal resources to prepare schools and public libraries to participate in this increasingly electronic world.

While there are exceptions, the simplest view is that OPLIN provides telecommunication services to the main buildings at public libraries, typically via T-1 or newer fiber Ethernet circuits on the Broadband Ohio network, OSCnet. The local libraries, in turn, have responsibility for connecting their branch buildings to their main building.

OhioLINK member libraries are connected to OSCnet/internet via links by their higher education institution.

All K-12 school traffic is also carried on OSCnet.

### 1.26 Library Automation

Ohio public libraries are in an advanced state of automation. There are approximately 15 commonly known unique commercial library automation systems in use from over 10 separate library system vendors. Additionally, there are other lesser known and custom created and supported automation systems in use at a variety of public libraries around the state.

Each of the members of the OhioLINK consortium use the Millennium ILS from Innovative Interfaces, and OhioLINK operates an INN-Reach union catalog and patron-initiated requesting service for its members. In addition to the college and university libraries, two public libraries (Cuyahoga County and Westerville) and one school library (Upper Arlington) are part of the INN-Reach system.

The K-12 school libraries that are automated via INFOhio are standardized on the SirsiDynix Sirsi K-12 automation platform. The INFOhio network utilizes 23 Information Technology Centers around the state to provide regional connectivity and support to participating schools and school libraries. However, all schools are not yet connected and the level of connectivity varies both within school districts and between districts throughout the state.

### 1.27 Terminology

Vendors should respond to the RFP in language no more technical than that of the RFP. The terms used in this RFP are intended to be consistent with those commonly used in the World Wide Web, education, library and computer fields. Vendors are asked to use comparable terminology in responding.

An attempt has been made to define or interpret terms in the context of the specifications, either by statements introducing certain sections or by examples within the specifications themselves. Specifications are intended to be basically self-explanatory. Vendors are encouraged to seek clarification for any terms or phrases used in the RFP following the inquiry process outlined in Section 1.8.

This RFP uses the term "Vendor" to designate the party responsible for responding to this RFP and for providing the System.

This RFP uses the term "borrowing library" to mean the library whose patron is initiating the borrowing of an item using the system.

This RFP uses the term "lending library" to mean the library from which an item is borrowed by the patron of the borrowing library.

1.28 RFP Distribution

This RFP is being provided electronically at <http://www.library.ohio.gov/swrs/rfp>

Notice of this RFP will be sent to resource sharing system vendors and library automation vendors who have a presence in the libraries of the Collaborative. In addition, electronic announcements will be sent or posted by the Collaborative to any relevant and appropriate listservs, blogs, and websites.

## 2.0 Format for Vendor Response

The State Library wants clear and concise proposals. Vendor responses must be submitted as specified below. Contents and materials must be clearly marked. It is essential that responses follow the prescribed format for submission exactly. Vendors are encouraged to submit additional narrative information, materials, and documentation in support of a bid; brochures or other materials beyond those necessary to present a complete and effective proposal are not desired.

### 2.1 Submission Requirements

The following sections must be included and clearly identified in VOLUME #1. All responses and materials must be presented in the order specified.

Any supplemental materials (that is, materials submitted to provide additional information) must be included in VOLUME #2 and must be clearly labeled and numbered to correspond to any relevant sections in the RFP.

#### SECTIONS TO BE INCLUDED IN VOLUME #1

##### 2.1.1 Vendor Identification Sheet (**Label A**)

Use the Vendor Identification Sheet in Appendix C. The identification sheet must contain the following information:

- Legal Name of the Company
- Address
- Name of Company Representative
- Title of the Company Representative
- Telephone number of the Company Representative
- Fax number of the Company Representative
- E-mail address of the Company Representative

##### 2.1.2 Table of Contents (**Label B**)

Provide a Table of Contents for VOLUME #1 with page numbers specified.

##### 2.1.3 Cover Letter (**Label C**)

A cover letter on company letterhead must be included which is in the form of a standard business letter. It must be signed by an individual authorized to legally bind the Vendor. The letter will provide an executive summary of the System being proposed. The letter must also include the following:

1. A statement indicating that the RFP has been read and agreed to;

2. A statement regarding the Vendor's legal structure (e.g., an Ohio corporation), Federal tax identification number, and principal place of business;
3. A list of the people who prepared the proposal, including their titles;
4. The name, phone number, and fax number of a contact person who has authority to answer questions about the proposal; and
5. A confirmation of the ability to make a presentation/demonstration to the RFP Evaluation Team in Columbus during the week of February 16-20, 2009. **[Corrected Date Error in RFP Document - January 16, 2009]**

#### 2.1.4 Vendor Information (**Label D**)

Provide a concise description of your company. Include information concerning financial stability (e.g., latest annual report), general organization and staffing, and experience of the company in the areas specified in this RFP.

#### 2.1.5 Customer References (**Label E**)

Provide appropriate and relevant lists of current customers and clients. Include any consortial or statewide customers, especially any of similar size or design to this project. Include dates, contact information, and a brief description of similarities to this project.

#### 2.1.6 Vendor Response and Descriptive Answers (**Label F**)

Respond to each of the specifications in Sections 3.0 through 9.0 of this RFP. In responding to each of the specifications, use the same numbering scheme and sequence provided by the RFP. Vendors are required to include the specifications as they appear in this RFP, followed by their response. Use a Response Sheet formatted like the one in Appendix D.

#### 2.1.7 Cost Summary (**Label G**)

Provide a price quotation for the System (see Appendix E for additional instructions).

#### 2.1.8 Proposed System Overview (**Label H**)

Provide a concise narrative overview of the resource sharing system proposed for the libraries in Ohio. Generally describe how you envision the system working. Note the availability of the four functional components and how they are integrated: Authentication, Patron Interface, Library Functions, and System Functions.

Outline the proposed system architecture which will link public and school libraries together and which will create a statewide circulation system which supports patron-initiated borrowing. Provide any flowcharts or diagrams which will facilitate understanding of your overall proposal.

What are the strengths of the proposed system? Outline experience you have had with implementing other large scale resource sharing systems. Why should OHIONET and the Collaborative consider it the best solution?

NOTE: Given the uniqueness and complexity of this project for Ohio and the Collaborative, this overview is considered an essential component of any vendor response.

## 2.2 Submission Information

In order to facilitate the review process, one electronic submission (original response) in HTML, PDF, OpenOffice and/or Microsoft Office format and five (5) printed copies of the proposal must be submitted as stipulated below (a total of 6 sets of the proposal). All copies must be packaged and labeled to show the following information on the outside of the packages:

Vendor Name and Address

"OHIONET and the Collaborative RFP RESPONSE"

Number of Packages (if more than one)

The original electronic submission and five (5) printed copies must be received by 3:00 p.m. Eastern Standard Time on January 30, 2009. The Response should be addressed to:

David Namiotka  
Director, Information Systems and Technology  
State Library of Ohio  
274 East First Avenue  
Columbus, OH 43201-3692

Phone: (614) 728-4988

Fax: (614) 387-0600

Email: [dnamiotka@sloma.state.oh.us](mailto:dnamiotka@sloma.state.oh.us)

Vendors must allow sufficient time for delivery of their proposals by the time specified. Proposals that are not submitted on time will not be evaluated. It shall be the Vendor's responsibility to ensure that proposals are actually received prior to the closing date and

time specified.

## FUNCTIONAL SPECIFICATIONS AND REQUIREMENTS

### GENERAL INSTRUCTION:

The following sections (3.0 through 9.0) outline the functional and system capabilities which are required or desired by the OHIONET and the Collaborative.

Two types of answers are required for specifications listed in Sections 3.0-9.0. Please refer to Section 2.0 for additional information before submitting a response to the RFP and use the Response Forms (Appendix D).

### 1. STATUS RESPONSES

These require the use of one of the following codes:

#### **A = Available**

Definition: The specification is to be labeled as AVAILABLE if it is currently a part of the system and if it is available immediately as part of the system provided for review as part of this proposal.

NOTE: If the specification is AVAILABLE with a minor difference, the Vendor must clearly indicate what the difference is. Any written clarifications must be attached at the end of the Vendor Response Forms, numbered to correspond to the specifications, and presented in numerical order.

#### **T = TESTING**

Definition: The specification is to be labeled TESTING if it is in the process of being developed, but is available for review by the RFP Evaluation Team on February 2, 2009.

**D = Development** Definition: The specification is to be labeled DEVELOPMENT if it can be developed (at cost or time).

NOTE: If the specification is labeled DEVELOPMENT, the Vendor must clearly indicate what is required to develop the capability; specifically, note any costs and/or time requirements. *The ability and commitment to develop these capabilities within six months of signing a contract must be clearly outlined.* Any written clarifications must be attached at the end of the Vendor Response Forms, numbered to correspond to the specifications, and presented in numerical order.

#### **N = Not Available**

Definition: The specification is to be labeled as NOT AVAILABLE if it not available and is not being tested or developed.

**2. WRITTEN ANSWER REQUIRED**

Vendors are expected to provide complete, well-analyzed responses to these questions. As appropriate, vendors may suggest alternative methods, capabilities, or strategies for accomplishing the desired capabilities. Vendors must provide complete, self-contained answers to all Written Answer Required questions. As noted, all costs must be included in the Cost Summary.

Your careful and thoughtful analysis and responses to the specifications will demonstrate your ability to meet OHIONET and the Collaborative's system requirements.

All Written Answer Required responses must be numbered to correspond to the specifications and presented in numerical order (see 2.1.6).

### 3.0 Functional Specifications: Authentication

Each patron using the system for resource sharing must be authenticated. It is anticipated that each user will be directly associated with their "home" library.

- 3.1 WRITTEN ANSWER REQUIRED: Briefly describe your system's proposed method of authentication. In particular, describe your system's capabilities to use distributed identity management systems, such as Shibboleth. (Note: Please review the following questions under "Authentication" before providing this answer to avoid unnecessary duplication.)
- 3.2 WRITTEN ANSWER REQUIRED: Indicate how your system authorizes a patron with a local library's automation system to determine: (1) if the patron record exists; (2) that the patron record is current; and (3) that the patron is approved to use the resource sharing system (e.g., is not delinquent, has a valid library card, etc.).
- 3.3 WRITTEN ANSWER REQUIRED: Describe how your system acquires and uses patron data from a local system ( for example, a local library automation system) to control the requesting of materials. More specifically: describe how the system queries patron files of different types; discuss your system's ability to access standard patron protocol servers; note any protocols used to communicate with the local system; indicate if any patron data is kept by your system and how long it is retained; note whether the system can determine and enforce different patron privileges depending on the type of patron (e.g., school student vs. school teacher)?
- 3.4 WRITTEN ANSWER REQUIRED: Indicate success in authenticating users from the existing systems listed in 6.13.
- 3.5 The system shall permit all patron record files to continue to reside on the local library's automation system, to the extent that local automation system are part of the proposed solution.
- 3.6 The system shall allow the local library to be responsible for updating and maintaining all patron records.
- 3.7 WRITTEN ANSWER REQUIRED: Describe the initial screen which will be displayed to users to access the resource sharing system. Describe any initial logon, if required.
- 3.8 WRITTEN ANSWER REQUIRED: Indicate at what point authentication occurs in your system. In other words, how and when is a patron told that authentication is required and how is this accomplished?

- 3.9 The system shall pass patron information through without change, accepting all policies regarding patron status set by the local library.

3.9.1 WRITTEN ANSWER REQUIRED: Describe how this is accomplished. In your response, indicate how the system will be able to accept the "problem patron" status codes of a variety of systems.

- 3.10 The system shall utilize existing patron barcodes.

3.10.1 WRITTEN ANSWER REQUIRED: Explain how the system handles duplicate patron barcode numbers from different libraries.

- 3.11 The system shall permit access as "guest" for searching only. Guest access shall not include Request privileges and shall not require authentication.

3.11.1 WRITTEN ANSWER REQUIRED: Describe how "guest" access is provided.

- 3.12 The system shall permit the authentication module to be used independently to authenticate patrons for access to any database or resource licensed by state contract, regional/consortial contract, or local library contract. Privileges will differ between state contract, regional/consortial contract, or local library contract.

3.12.1 WRITTEN ANSWER REQUIRED: Describe how this is accomplished.

- 3.13 WRITTEN ANSWER REQUIRED: Describe how patrons can be blocked from using the system to request items if the patron's local library wishes to limit their use of the system.

- 3.14 The system shall support a capability to establish a maximum number of requests a patron can place at any one time.

3.14.1 WRITTEN ANSWER REQUIRED: Describe how this is accomplished by your system.

- 3.15 WRITTEN ANSWER REQUIRED: Describe how your system can prevent a patron from placing multiple requests for the same item at the same time.

- 3.16 WRITTEN ANSWER REQUIRED: Discuss how your system ensures the confidentiality of patron records and maintains patron privacy. Discuss default record retention policies for personally identifying information in the system (including circulation and/or billing transactions), and how much flexibility is available for changes to these defaults.

- 3.17 The system shall permit multiple levels of staff privileges.

3.17.1 WRITTEN ANSWER REQUIRED: Describe in some detail the levels of staff authentication. Specify available levels of staff access (e.g., circulation staff, librarians, managers, etc.). Indicate how staff passwords are established and maintained.

## 4.0 Functional Specifications: Patron Interface

The system shall provide a single interface which allows a user to gain access to a wide variety of bibliographic data in catalogs of member institutions, as well as data in other catalogs, databases, applications, and systems.

### Searching

- 4.1 The system shall permit searches by:
  - 4.1.1 Author
  - 4.1.2 Title
  - 4.1.3 Subject
  - 4.1.4 Keyword
  - 4.1.5 ISBN
  - 4.1.6 ISSN
  
- 4.2 The system shall accommodate the following types of searches, provided the Z39.50 servers with which it interfaces permits them:
  - 4.2.1 Boolean AND
  - 4.2.2 Boolean OR
  - 4.2.3 Boolean NOT
  - 4.2.4 Limiting by date
  - 4.2.5 Limiting by type of materials
  - 4.2.6 Proximity
  - 4.2.7 Exact match
  
- 4.3 WRITTEN ANSWER REQUIRED: Different automation systems employ different search methods. If the proposed system does not require the creation of a union catalog, describe the extent to which your system permits patrons to search by methods not supported by their local system but which are supported by other remote Z39.50 servers.
  
- 4.4 The system shall permit individual libraries to limit subject searching to staff.
  
- 4.5 The system shall distinguish between searches for monographs and searches for serials
  - 4.5.1 WRITTEN ANSWER REQUIRED: Briefly discuss how your system makes this distinction. For example, does the system use fixed fields in the MARC record to distinguish between monographs and serials?
  
- 4.6 The system shall have the capability to permit individual libraries to limit serial searching to staff.
  
- 4.7 The system shall have the capability to permit individual libraries to limit

advanced searching features (e.g., those listed in 4.2) to staff.

4.8 The system shall indicate if some portion of the search encountered a problem (e.g., the search timed out, the local system did not respond, etc.)

4.9 The system shall inform the user if a "long search" (as defined by the system) is in progress and offer the means to interrupt the search.

4.9.1 WRITTEN ANSWER REQUIRED: If the system will create a "virtual catalog" of Ohio libraries, explain how your system handles inaccessible catalogs. Describe any time-out error messages and indicate, if appropriate, your error tolerance standards.

4.10 The system shall permit the user to initiate a new search from any screen.

4.11 The system shall accommodate returning to previous screens or menus with one click.

4.12 The system shall permit the size of resulting sets to be limited by:

4.12.1 The number of items displayed from each catalog searched.

4.12.2 The total number of items displayed.

4.12.3 FRBR work-set grouping. The system shall return search results for a single title regardless of number of catalog records or media.

## **Displaying Results**

4.13 WRITTEN ANSWER REQUIRED: Provide a brief overview of how results are displayed by your system. (Note: Please review the following questions under "Displaying Results" before providing this answer to avoid unnecessary duplication.)

4.14 The system shall provide:

4.14.1 Brief displays.

4.14.2 Detailed displays.

4.15 The system shall have the capability to permit profiling to specify what data elements are displayed as the result of a patron search.

4.15.1 On a system-wide basis

4.15.2 By individual libraries

4.16 The system shall permit the patron to request the display of additional information from the MARC record, if not displayed automatically.

4.17 The system shall allow the local library to determine what additional information can be displayed.

4.18 The system shall be able to display the current item level status of any item retrieved and selected by the patron.

4.18.1 WRITTEN ANSWER REQUIRED: Not all automation systems have the ability to provide item status, as required by Z39.50 Version 3. Describe how your system can retrieve item status information from such servers.

4.19 The system shall have the capability to display detailed bibliographic information for an item that is owned by more than one library.

4.19.1 WRITTEN ANSWER REQUIRED: Describe how your system displays detailed copy status for one individual item. What information is displayed?

4.20 The system shall have the capability to display status information for an item that is owned by more than one library.

4.20.1 WRITTEN ANSWER REQUIRED: Describe how this is accomplished and indicate if the system displays multiple hits retrieved by identifying the catalogs searched.

4.21 The system shall display detailed bibliographic-level information which includes, but is not limited to:

4.21.1 author (1xx)

4.21.2 title (24x)

4.21.3 place of publication (260)

4.21.4 publisher (260)

4.21.5 date of publication (260)

4.21.6 physical description (300)

4.21.7 series (4xx)

4.21.8 holdings (9xx)

4.21.9 ISBN

4.21.10 LCCN

4.22 WRITTEN ANSWER REQUIRED: Describe how your system can display holdings in the following circumstances. Number each separately. If answers are the same, please restate the information for each.

4.22.1 Holdings sent in 9xx fields in the MARC record (e.g., Dynix's use of the 920 field)

- 4.22.2 Holdings sent in a format compliant with the OPAC Syntax described in Z39.50-1995, Appendix 5
  - 4.22.3 Holdings sent in a format compliant with the developing OPAC Schema
  - 4.22.4 Proprietary ORA\_HOLDINGS format for ORA Classic Servers
  - 4.22.5 Proprietary holdings information in a Z39-50 compliant, locally-designed systems (e.g., Columbus Metropolitan Library Discovery Place)
  - 4.22.6 Holdings information sent in 856 field
- 4.23 The system shall display availability information which includes but is not limited to:
- 4.23.1 Location or branch
  - 4.23.2 Call number or ID Number
  - 4.23.3 Availability status (real time)
  - 4.23.4 Format (Material) Code
  - 4.23.5 Date Due (if available)
- 4.24 The system shall automatically display the availability if only one item is retrieved.
- 4.25 The system shall show the availability of an item at the copy or volume level.
- 4.26 The system shall have the capability to dedup results and to display "unique" items on each line of the display.
- 4.26.1 WRITTEN ANSWER REQUIRED: Briefly describe how dedupping works in your system. Indicate whether partial results are displayed before the dedupping process is completed. Outline any limits to search results which can be configured (e.g., no more than 10 titles per catalog, no more than 40 titles retrieved per search, etc.).

## REQUESTING

The requesting portion of the system is viewed as an extension of the circulation model rather than an augmentation of the ILL model.

- 4.27 WRITTEN ANSWER REQUIRED: Briefly describe how a patron places a request in your system. (Note: Please review the following questions under "Requesting" before providing this answer to avoid unnecessary duplication.)
- 4.28 The system shall permit the user to initiate the requesting process in one step (e.g., with one click).
- 4.29 The system shall allow any Ohio library card holder to initiate their own requests for materials using a Web-based interface.

4.30 WRITTEN ANSWER REQUIRED: Describe how catalogs will be queried as part of the requesting process. Describe for Z39.50 catalogs and also for non-Z39.50 compliant catalogs. Cover all types of catalogs found in Ohio (see 6.11).

NOTE: Appendices A and B provide information about existing multi-type consortia and automation vendor affiliations by public libraries in Ohio. The following specifications (4.31--4.37) are meant to indicate *what* the system should accomplish, *not how* it must be done. Use 4.30 to provide an overview of how your system will work. Append clarifying comments for any of the specifications. It is anticipated that patrons will generally not be allowed to select the lending library. Since a statewide delivery system will be established, the groups do not need to be geographically based.

4.31 The system shall permit the order in which additional catalogs are searched by the system to be specified:

4.31.1 By State or locally-defined regions

4.31.2 By local libraries

4.31.3 WRITTEN ANSWER REQUIRED: Describe how the system generates lender strings for requested items and how the lender strings can be customized, both centrally and locally.

4.32 The system shall first check to determine if the requested title is owned by the requester's library.

4.32.1 If the item is owned locally, the system checks to determine if the item is available.

4.32.2 If the item is available, locally set policies determine whether the item can be requested.

4.32.3 WRITTEN ANSWER REQUIRED: Describe how this is accomplished. For example, how a local library can block a request for an item available in the requester's library.

4.33 After determining that the requested item is not available locally, the system shall check default search groups to determine if the item is available and loanable.

4.34 If the item is owned by at least one other lending library, the system checks to determine if the item is:

4.34.1 available

4.34.2 loanable

4.34.3 WRITTEN ANSWER REQUIRED: Describe how your system checks for availability. For example, how does it differentiate between different terms that lending libraries use (e.g., "available," "not checked out," "on shelf," etc.)?

4.35 The system shall compile a list of libraries which hold the requested item.

4.36 The system shall have the capability to automatically place a hold on the requested item in the owning library's online circulation system.

4.36.1 WRITTEN ANSWER REQUIRED: Describe how this is accomplished.

4.37 WRITTEN ANSWER REQUIRED: The proposed resource sharing system assumes centrally-determined groups of libraries which are searched when a requester enters a request for an item which is not available in their local library. However, the local library should also have the capability to direct patrons to a library-selected list of "local" libraries. Although the actual location of an item is immaterial with a statewide document delivery service in place, it is assumed that some patrons may wish to identify local libraries having the desired item so that they can go to that library immediately and directly. Describe how this can be supported by your system.

4.38 The system shall have the capability to require the patron to designate a "need by date."

4.38.1 WRITTEN ANSWER REQUIRED: Describe how this is accomplished. In many cases, the local library will choose not to require the patron to set a "need by date." Verify whether this capability is optional at the local library level.

4.38.2 WRITTEN ANSWER REQUIRED: Indicate what action is taken by the system if the need by date is exceeded. Also, note whether a minimum length of time can be established (i.e., so that the need by date cannot be set for the next day).

4.39 The system shall require a requester to designate a delivery (pick-up) location. This location can be any pick-up location of any library in the SWRS system. It need not be affiliated with the local library for which the patron is authenticated.

4.39.1 WRITTEN ANSWER REQUIRED: Describe how this is accomplished.

4.40 The system shall permit multi-level delivery locations by library system/school system and then by branch/building.

4.40.1 WRITTEN ANSWER REQUIRED: Describe how the borrowing library can identify delivery locations in a multi-level environment (e.g., the requester should be able to pick any library or branch in the system, providing the library offers delivery to that location). Indicate how the system determines which potential delivery locations to be displayed based on the authenticated library patron.

4.41 The system shall provide an optional "notes" field as part of the request to permit

a user to include a note. The note shall be visible to staff at the lending and borrowing libraries, as well as to the patron, when displaying the request.

4.41.1 WRITTEN ANSWER REQUIRED: Describe how this is accomplished. Note if it is possible to suppress this capability.

4.42 The system shall support a "lender of last resort" feature which refers all unfilled requests to one designated library.

4.42.1 WRITTEN ANSWER REQUIRED: Indicate how such a feature might work.

4.43 The system shall require a requester to confirm the information before the actual request is placed.

4.43.1 WRITTEN ANSWER REQUIRED: Confirm that your system has such a feature and indicate what transaction details (e.g., requester's name, item requested, pick-up location, loan period, etc.) are presented to the requester. Indicate how the requester confirms the information and how he corrects any incorrect information.

4.44 The system shall confirm the placing of a request with an immediate response.

4.45 The system shall have the capability of confirming the placing of a request by email to the patron.

4.45.1 WRITTEN ANSWER REQUIRED: Describe how this can be accomplished.

4.46 The system shall provide a unique request number to the requester.

4.46.1 WRITTEN ANSWER REQUIRED: Describe how the system does this.

4.47 The system shall permit a requester to modify or cancel his request at any time after it is submitted.

4.47.1 WRITTEN ANSWER REQUIRED: Describe how this is accomplished.

4.48 The system shall permit the user to determine for an individual request:

4.48.1 Current status of the request

4.48.2 Date of the request

4.48.3 Need by date

4.48.4 Due date

4.48.5 Delivery (Pick-up) Location

- 4.48.6 Lending Library
- 4.48.7 Borrowing Library
- 4.48.8 Notes included
- 4.48.9 Request number

4.48.10 WRITTEN ANSWER REQUIRED: Describe how a patron can view the current status a specific request or review the status of all of her outstanding request.

4.49 The system shall have the capability to communicate with patrons after a request has been placed and accepted (e.g., after the patron has left the library) by

- 4.49.1 Email
- 4.49.2 Fax
- 4.49.3 Printed notice
- 4.49.4 SMS message
- 4.49.5 ATOMPUB/RSS feed

4.49.6 WRITTEN ANSWER REQUIRED: Describe in some detail the various types of patron notification that are available in your system. Indicate at what points in the process the system can communicate with the patron using the methods listed above. For example, how does the system notify a patron that a requested item has arrived or that the request cannot be filled? Indicate whether the patron can specify the method of notification from those available.

4.50 WRITTEN ANSWER REQUIRED: Describe to what extent the system interfaces with existing library automation system notification options for the purposes of request notification, fulfillment, rejection, overdue/courtesy notices, and billing notices.

4.51 The system shall permit an individual library to selectively enable or disable user notification options.

4.52 The system shall permit a patron to request a renewal of an item he has already borrowed.

4.52.1 WRITTEN ANSWER REQUIRED: Describe how this is accomplished. Indicate whether the borrowing library and/or the lending library can refuse to make this option available or, in the case of the lending library, automatically deny all requests for renewals.

4.53 WRITTEN ANSWER REQUIRED: The system shall have the capability of charging patrons for ILL service. While Ohio does not envision charging for any aspect of the resource sharing process, describe how your system currently handles charging. Indicate charging options (e.g., credit cards, charge to patron's

local system, etc.) and categories upon which charges can be based (e.g., patron type, type of material, etc.).

- 4.54 The system shall support the request and delivery of copies of items and other non-returnable materials. OHIONET and the Collaborative anticipate the need to support the delivery of photocopies of magazine articles.

4.54.1 WRITTEN ANSWER REQUIRED: Describe how such items can be identified and requested using your system. For example, if a patron selects a bibliographic record for a journal (e.g., *Newsweek*), to what extent does the system allow her to specify and request a specific article (e.g., "The Paperless Society" on p. 32 of the January 4, 2000, issue of *Newsweek*)?

In addition, briefly describe delivery options and any capabilities for tracking copyright compliance.

- 4.55 WRITTEN ANSWER REQUIRED: Describe how a patron places requests for more than one item. For example, how does she initiate a second request after completing the process of requesting the first item?

- 4.56 WRITTEN ANSWER REQUIRED: Describe how your system makes it possible for a patron to request a specific volume of a multi-volume set of a series when the lending library catalogs multi-volume works in a single bibliographic record.

## 5.0 Functional Specifications: Library Functions

Please refer to the definitions in 1.27 to properly differentiate between "borrowing library" and "lending library," as used in this RFP.

### Borrowing Library

- 5.1 WRITTEN ANSWER REQUIRED: Indicate whether "library profiles" are required by your system to control the operation of the system and, if so, what information the records contain and how these records are stored, maintained, and updated. If appropriate, distinguish between local library profiles, system profile, lending library profile, and borrowing library profile.
- 5.2 The system shall have the capability to allow borrowing libraries to limit the types of requests which can be placed before they are sent to potential lending libraries.
- 5.2.1 By type of material
- 5.2.2 By type of patron
- 5.2.3 WRITTEN ANSWER REQUIRED: Describe how your system accomplishes this. Also indicate how the patron is informed that his request has not been placed.
- 5.3 The system shall have the capability to allow lending libraries to have external requests put into a file of requests which requires human intervention.
- 5.4 The system shall have the capability to allow the borrowing library to establish loan periods.
- 5.4.1 WRITTEN ANSWER REQUIRED: OHIONET and the Collaborative anticipate that the borrowing library, and not the lending library, will set loan periods. Describe how this is accomplished and how this information is communicated to the lending library when the item is delivered.
- 5.5 WRITTEN ANSWER REQUIRED: Describe how the system creates a record for requested items in a local system, including record creation, purging and status information for Z39.50 and other systems.
- 5.6 The system shall utilize existing item barcodes.
- 5.6.1 WRITTEN ANSWER REQUIRED: Explain how the system handles duplicate item barcodes from different libraries.
- 5.7 WRITTEN ANSWER REQUIRED: Describe what steps must be followed when a requested item is received at the borrowing library. Specifically, what actions require staff involvement to receive an item from a lending library.

- 5.8 WRITTEN ANSWER REQUIRED: Describe how the system interacts with the borrowing library's automated circulation system when the requested item is received. Indicate how the borrowed item is circulated using the borrowing library's automated circulation system. Specify how temporary bibliographic and item records are created in the local system for the borrowed item.
- 5.9 WRITTEN ANSWER REQUIRED: Describe how your system handles the return of the borrowed item. Indicate what steps must be followed when a requested item is returned at the borrowing library. Specify if and how the temporary bibliographic and item records are deleted in the local system for the borrowed item.

### **Lending Library**

- 5.10 WRITTEN ANSWER REQUIRED: Generally describe the process required at the lending library to process a request. (Note: Please review the following questions under "Lending Library" before providing this answer to avoid unnecessary duplication.) In answering this question, also address:
- (1) What manual staff intervention is required by the lending library to process and complete a request from receipt to shipping of the item.
- (2) How your system automatically interacts with the lending library's local circulation system during this process.
- 5.11 WRITTEN ANSWER REQUIRED: Describe how your system notifies a potential lending library that an item has been requested. Indicate what action must be taken to indicate that the requested item will be supplied. Similarly, indicate what action must be taken to indicate that the requested items cannot be supplied.
- 5.12 WRITTEN ANSWER REQUIRED: Describe how the lending library is informed of the request so that the item can be pulled by the circulation staff. Specifically, does the system generate a "pull list"?
- 5.13 The system shall have the capability to limit the number of days a request will stay pending at a specific lending library.
- 5.13.1 WRITTEN ANSWER REQUIRED: Describe how this is accomplished. Indicate what occurs when this time limit is exceeded.
- 5.14 The system shall have the capacity to allow potential lending libraries to refuse to fill request.
- 5.14.1 WRITTEN ANSWER REQUIRED: Describe how this is accomplished.

- 5.15 WRITTEN ANSWER REQUIRED: Indicate how the lending library can specify special conditions for the loan (e.g., in-house use only).
- 5.16 WRITTEN ANSWER REQUIRED: Indicate how the lending library undertakes the process of shipping the item to the borrowing library. What staff activity is required?
- 5.17 The system shall have the capability to produce a variety of shipping labels for items to be supplied by the lending library.
- 5.17.1 WRITTEN ANSWER REQUIRED: Describe how these are produced.
- 5.18 WRITTEN ANSWER REQUIRED: Describe what the lending library must do to indicate that the requested item has been shipped.
- 5.19 The system shall have the capability to print a pull slip and item marking information (such as a sleeve or label) to be placed on requested times that are pulled from the shelves.
- 5.20 WRITTEN ANSWER REQUIRED: Describe how the item is identified to the system (e.g., by a temporary patron barcode).
- 5.21 WRITTEN ANSWER REQUIRED: Describe how your system handles overdues. How are overdue notices sent? To whom? By whom? In what format?
- 5.22 The system shall have the ability to issue recall notices.
- 5.22.1 WRITTEN ANSWER REQUIRED: Describe how your system handles recall notices.
- 5.23 WRITTEN ANSWER REQUIRED: Describe the process the lending library must undertake to receive and check-in a returned item. What actions are required of staff at the lending library and what happens automatically when these actions are performed? How is receipt of the returned item acknowledged to the borrowing library?
- 5.24 WRITTEN ANSWER REQUIRED: Describe how staff at the lending library can track and/or inquire about the status of a requested item. Indicate what access points (e.g., title, patron name, etc.) can be used.
- 5.25 The system shall have the capability to allow lending libraries to temporarily refuse to accept requests (e.g., for a holiday, because of a move, etc.).
- 5.25.1 WRITTEN ANSWER REQUIRED: Describe your system's ability to permit this and indicate how a requester is notified that the library is not a provider at this

time.

- 5.26 WRITTEN ANSWER REQUIRED: Describe how the system shall identify items checked out to the resource sharing system.
- 5.27 WRITTEN ANSWER REQUIRED: Describe how your system selects or deselects potential lenders based on certain bibliographic data elements (e.g., some libraries do not share videos).
- 5.28 WRITTEN ANSWER REQUIRED: Describe how your system selects or deselects potential lenders by availability or circulation status (e.g., only libraries which indicate that the item is available are listed).
- 5.29 WRITTEN ANSWER REQUIRED: Describe in some detail how you envision balancing requests across the system (i.e., "load leveling"). In addition, can your system set a maximum number of active requests that will be sent to any one library?

### **Mediation**

Although it is anticipated that the system will allow some degree of mediation either at the borrowing library and/or the lending library, the system is intended to be as non-mediated as possible. However, some local libraries may wish to impose some degree of mediation.

- 5.30 The system shall have the capability to allow the borrowing library to mediate requests made by its patrons before requests are sent.

5.30.1 WRITTEN ANSWER REQUIRED: Generally describe mediation options for the borrowing library. For outgoing requests which are mediated, describe the extent to which the borrowing library can do the following and indicate how the patron is notified of any changes in his request:

- (1) Deny the request and notify the patron
- (2) Select a different lending library (e.g., not the one recommended by the system)
- (3) Select a different item than the one requested by the patron (e.g., a different edition of the title in a paperback edition).

- 5.31 The system shall allow lending library to mediate requests made of its collection by external patrons.

5.31.1 WRITTEN ANSWER REQUIRED: Generally describe mediation options for the lending library. For incoming requests, describe the extent to which the lending library can do the following and indicate how the patron is notified of any changes in his request:

- (1) Deny the request
- (2) Send the request to another library

5.32 WRITTEN ANSWER REQUIRED: Describe how a staff member can place a request in your system. Briefly identify what a staff member can do in placing a request that a patron cannot do.

## 6.0 Functional Specifications: System Functions

### System Architecture

- 6.1 WRITTEN ANSWER REQUIRED: Generally describe the system architecture for the system you are proposing for Ohio. Include flowcharts, diagrams, and different scenarios, as appropriate. As part of your response:
- 6.1.1 Clearly indicate what your system provides and what is required from the entity implementing the system and what is required from local libraries.
  - 6.1.2 Indicate records (e.g., patron, bibliographic, or transaction), if any, that your system keeps centrally.
  - 6.1.3 Describe how your system interacts with local automated circulation systems of both borrowing and lending libraries.
- 6.2 WRITTEN ANSWER REQUIRED: Describe in detail the hardware, operating system, and software required to run this system. Indicate the hardware platforms you support as well as the operating systems and other supporting software required to run your system. Stipulate the versions you support. Include all costs on the Cost Sheet. If applicable, indicate costs of software as a service (SaaS) versus self-hosting of service.
- 6.3 WRITTEN ANSWER REQUIRED: Describe any facility requirements to house any hardware associated with the system. Include any costs on the Cost Sheet.
- 6.4 WRITTEN ANSWER REQUIRED: If the system will utilize the Z39.50 protocol to create a "virtual catalog" of Ohio's libraries, please address the following: As outlined in Appendices A and B, the system will be required to interact with different servers running various automation systems. Describe in some detail how you propose to search these different servers (e.g., serially or in parallel) from libraries and how records will be consolidated and deduped and then displayed. (See also note after 4.30)
- 6.5 WRITTEN ANSWER REQUIRED: If the system you propose will create a union catalog, please address the following: Describe in detail how your proposed system would update the Union Catalog. Please indicate the frequency of updates and how records will be consolidated and deduped and then displayed.
- 6.6 WRITTEN ANSWER REQUIRED: If the system you propose will create a union catalog, please address the following: Describe in detail how your proposed system will allow for the injection of records that are in common to all members (e.g., consortially purchased resources) into the union catalog.
- 6.7 The system shall operate using a variety of standard end-user web graphical browser, including but not limited to:

- 6.7.1 Microsoft Internet Explorer (6.0 and up)
  - 6.7.2 Firefox (3.0 and up)
  - 6.7.3 Opera
  - 6.7.4 Safari
- 6.8 WRITTEN ANSWER REQUIRED: Generally describe your use of the web browsers listed in 6.7. Indicate if any other interfaces are supported and/or recommended, either for staff or patron access.
- 6.9 The system shall permit users to access the system:
- 6.9.1 From within member libraries
  - 6.9.2 Through external connection to the Internet (e.g., from home or work).
- 6.10 The system shall not require any specific display resolution or other local configuration.
- 6.11 The system shall have a patron web interface which is independent of local workstation configurations.
- 6.12 WRITTEN ANSWER REQUIRED: The system shall employ principles of Representational State Transfer (REST) in the creation of a patron request transaction from an agent other than a standard web browser (for instance, from a link resolver application). Describe how an automated agent can create, monitor, and cancel a patron request.
- 6.13 WRITTEN ANSWER REQUIRED: Discuss your ability to interact with the following library automation systems which are currently being used by Ohio libraries. Provide examples, if available, of libraries using these automated systems which have implemented your system.
- 6.13.1 SirsiDynix (Classic, Horizon, Unicorn, Symphony)
  - 6.13.2 Innovative Interfaces (Release 2006, Release 2007)
  - 6.13.3 Follett (Spectrum, Winnebago, Sagebrush)
  - 6.13.4 AutoGraphics
  - 6.13.5 TLC (Library.Solution)
  - 6.13.6 Polaris (ILS)
  - 6.13.7 Koha
  - 6.13.8 Evergreen
  - 6.13.9 VTLS (Virtua)
  - 6.13.10 ExLibris
- 6.14 WRITTEN ANSWER REQUIRED: Describe how your system deals with branch libraries when searching, requesting, and lending materials.
- 6.15 WRITTEN ANSWER REQUIRED: Describe how the system will function in

libraries that use proprietary implementation of Z39.50 standards systems. Indicate systems (e.g., telnet, web, in-house automation systems) for which you have done this.

- 6.16 WRITTEN ANSWER REQUIRED: Describe how your system would handle automated libraries without Z39.50 servers who wish to participate in the system as lending and borrowing libraries. Indicate options, if available.
- 6.17 WRITTEN ANSWER REQUIRED: Describe how non-automated libraries could participate in resource sharing using your system.
- 6.18 WRITTEN ANSWER REQUIRED: It may be necessary for some libraries to participate only as "borrowers." Describe how such users can be accommodated in your system.
- 6.19 WRITTEN ANSWER REQUIRED: It is anticipated that use of the system will constantly grow and expand. Indicate any limitations of your proposed system which would require the system to be "scaled up." For example, is there a maximum number of libraries, of transactions, etc. which the proposed system can accommodate without a degradation of service? Address the extent to which the system can be scaled up and what this would require.
- 6.20 WRITTEN ANSWER REQUIRED: Today's libraries recognize the importance of reliability of any automated system. Reassure OHIONET and the Collaborative that your system will provide reliable service. Provide statistics from other libraries using your system to demonstrate the reliability of your system. Indicate a level of performance that you would be prepared to cover by a warranty in a contract (e.g., "The System will be operational 98% of the time or certain penalties may be applied.").
- 6.21 WRITTEN ANSWER REQUIRED: Today's libraries appreciate the importance of consistent and fast system response times, but they also recognize the various external factors which affect response time. Nevertheless, please provide estimates of "normal" response times for the major transactions performed by your system. If possible, provide response time statistics from libraries already using your system.
- 6.22 WRITTEN ANSWER REQUIRED: Describe how your system compiles with the American with Disabilities Act and operate with assistive software or devices such as large print indexes, voice-activated input, alternate keyboard or pointer interfaces, etc.
- 6.23 WRITTEN ANSWER REQUIRED: Describe any "timeout" feature on your system to deal with patrons who begin to enter a request, get interrupted, and leave the workstation without canceling the request. At this point the next user could, either

unintentionally or maliciously, place other requests, etc. Indicate any safeguards your system has to lessen the likelihood of this unauthorized use.

### **Standards**

- 6.24 WRITTEN ANSWER REQUIRED: Describe the extent to which the system supports the ISO 10161-1 standards. Also indicate any ways in which the system deviates from these standards.
- 6.25 WRITTEN ANSWER REQUIRED: Describe the extent to which the system supports the NISO Circulation Interchange Protocol (NCIP) Standard ANSI/NISO A39.83 (2002). Also indicate any ways in which the system deviates from this proposed standard.
- 6.26 WRITTEN ANSWER REQUIRED: Describe the extent to which the system supports ANSI NISO Z39.50 and applicable subsections (e.g., item order or extended service). Also indicate any ways in which the system deviates from these standards. Indicate which versions you support. Describe how results may differ when results are retrieved from systems using different versions of Z39.50
- 6.27 The system shall generate valid XHTML/HTML and CSS. To be considered valid, the web server responses must validate against the standards as defined by the Worldwide Web Consortium (W3C).
- 6.28 The system shall generate semantic web markup (such as unAPI and/or OpenURL COinS) for bibliographic metadata.
- 6.29 The system shall use appropriate HTTP response codes (e.g., 404 for items not found, 201 for the creation of new REST transactions) as defined by the HTTP standard.
- 6.30 WRITTEN ANSWER REQUIRED: Identify all protocols which local systems must support to successfully interface with your system. Note which of the vendors listed in 6.11 you have successfully communicated with using these protocols.
- 6.31 WRITTEN ANSWER REQUIRED: The following additional standards have been identified as relevant to the proposed system. Indicate if you have implemented this standard. Describe success in meeting each of them and indicate any ways in which your system deviates from any of the standards. Note any library automation vendor's systems you have tested this standard on. If you have not implemented this standard, what are your intentions (e.g., timetable for implementation or why you do not intend on implementing it).

### *Circulation*

6.26.1 3M Standard Interchange Protocol. Data Transfer Protocol Between Library Automation Devices and automated Circulation Systems (Revision 2, 1997)

6.26.2 ISO 8459-4:1997, Information and Documentation -Bibliographic Data Element Directory -Part 4: Circulation Applications

*Interlibrary Loan*

6.26.3 ISO 10160, Information and Documentation-Open Systems Interconnection-Interlibrary Loan Application Service Definition (2nd edition, 1997)

6.26.4 ISO 8459-1 :1988, Information and Documentation -Bibliographic Data Element Directory -Part 1: Interloan Applications

## 7.0 Management and Support

- 7.1 WRITTEN ANSWER REQUIRED: Generally describe your proposed method and level of system support including warranty, documentation, training, phone support, field service, and software upgrades. Distinguish between support provided for the central site system administrators and for the libraries themselves.
- 7.2 WRITTEN ANSWER REQUIRED: Describe how problems are to be reported and how they will be resolved. Note any escalation procedures or other mechanisms for ensuring that reported problems are resolved in a timely fashion.
- 7.3 WRITTEN ANSWER REQUIRED: Describe the availability of technical support. Indicate hours of technical or operational support. Indicate the extent to which support will be provided for technical problems, including but not limited to authentication, searching, library functions, and system functions. Include costs on Cost Sheet.
- 7.4 The system shall provide support for the central site staff.
- 7.4.1 WRITTEN ANSWER REQUIRED: Briefly describe the type and extent of assistance that will be provided to central site staff.
- 7.5 The system shall provide support for the help desks of central site staff.
- 7.5.1 WRITTEN ANSWER REQUIRED: It is the intent of the central site to provide the first level of local user assistance (i.e. that the central site staff will be the primary point of contact with the Vendor's Help Desk). Indicate how you envision this process working.
- 7.6 WRITTEN ANSWER REQUIRED: Indicate the extent, if any, to which local library staff will be able to contact you directly (e.g., through a Help Desk) to receive assistance in using the Product. Note: It is not anticipated that students or library patrons will be permitted to contact you directly. If local access to your Help Desk has cost ramifications, they must be noted on the Cost Sheets.
- 7.7 The system shall be capable of producing a variety of standard system-wide statistical reports for the central site on specified dates, including, but not limited to:
- 7.7.1 Number of items requested
  - 7.7.2 Number of items lent
  - 7.7.3 Filled vs. Unfilled requested
  - 7.7.4 Number of items borrowed by library
  - 7.7.5 Number of items lent by library

- 7.7.6 Number of patrons requesting items by library
- 7.7.7 Number of patrons accessing the system (i.e., authenticated)
- 7.8 WRITTEN ANSWER REQUIRED: OHIONET and the Collaborative require that a wide variety of statistics and reports be available and provided by the system. For example, it is anticipated that a transaction history will be compiled for each request and that these histories can be searched and sorted to compile various statistical reports.
- In your answer, respond to the following:
- (1) Describe the extent to which customized reports can be provided.
  - (2) Indicate any other standard measures the system tracks or reports the system offers.
  - (4) Delineate the extent to which the central site can request other customized reports and/or how central site staff could compile such reports.
  - (5) Outline the types of reports that can be generated by local libraries to document participation in resource sharing.
  - (6) Describe your system's ability to export data in a standard format to a database management report writer. Specify what formats and report writers that your system supports.
- 7.9 WRITTEN ANSWER REQUIRED: Describe the extent to which data is archived in your system, either automatically or manually.
- 7.10 WRITTEN ANSWER REQUIRED: Describe the amount and level of central site staffing required to develop, implement, and maintain the system you propose. (Note: This does not include staff required for the operation of the system in a library.) Distinguish, as necessary, between developing, implementing, and operating/maintaining the system.
- 7.11 WRITTEN ANSWER REQUIRED: Describe the amount and level of local library staff required to operate the system. Specifically, what will be required from the local library's system administrator or automation coordinator to implement your system?
- 7.12 WRITTEN ANSWER REQUIRED: Outline in some detail an implementation schedule that will meet the performance and acceptance standards described in 11.7. Indicate target dates and specify what actions will be required by OHIONET and the State Library of Ohio and the local libraries to meet these deadlines. A flowchart can be included, but a narrative description is also required. (At this time it is likely that the State Library of Ohio will be the first central site to implement this system).
- 7.13 WRITTEN ANSWER REQUIRED: Describe how upgrades to the system are

made available. Are they automatic or is their an additional cost? Specify cost on Cost Sheet.

- 7.14 WRITTEN ANSWER REQUIRED: If certain portions of the system are customized to meet the needs of Ohio's libraries, indicate the extent to which this will affect our ability to load future upgrades, etc.
- 7.15 WRITTEN ANSWER REQUIRED: Describe how problems, bug fixes, suggestions for enhancements, etc. are prioritized within your company. Note if there is a users group which makes such recommendations.

## **8.0 Training and Documentation**

- 8.1 WRITTEN ANSWER REQUIRED: As noted in 1.1, the system must be easy to use by untrained patrons who are minimally familiar with the Internet and the Web. While teachers, school library media specialists, and librarians can and will provide group and individual instruction, as necessary, to effectively use the system, it is essential that most patrons be able to individually use the system without direct intervention by a librarian. Describe how your system will meet this ease-of-use requirement for patrons, especially users who will access the system outside of the library.
- 8.2 WRITTEN ANSWER REQUIRED: Identify any user manuals or system documentation that will be supplied with the system for both the central site staff and local library staff. Describe how these materials will be available (e.g., online) or distributed (e.g., print copies provided to each school and public library). Include examples and samples of documentation, as appropriate. Any costs for documentation must be noted on the Cost Sheets.
- 8.3 WRITTEN ANSWER REQUIRED: It is anticipated that central site staff will provide regional or local workshops to demonstrate to library staff how the system operates. Detail plans to train trainers. Describe any and all training that is included in this bid. Describe the standard training and indicate any additional training which can be requested at additional cost. Any costs must be included on the Cost Sheets. Indicate options of on-going training and costs for such training.
- 8.4 WRITTEN ANSWER REQUIRED: Discuss and identify any promotional materials provided or available to introduce the system to patrons. Any costs for promotional materials must be identified on the Cost Sheets. Provide samples, as appropriate.
- 8.5 The vendor shall assign a staff person to monitor and contribute to the relevant staff listservs maintained by OPLIN, INFOhio, and the State Library.

- 8.5.1 WRITTEN ANSWER REQUIRED: Describe how you envision using this listserv capability.

## **9.0 Plans for Development**

- 9.1 WRITTEN ANSWER REQUIRED: Describe your Product as it was available as of October 2008. Then compare this with your current (January 2009) status. Indicate how enhancements were developed, priorities decided, and implementation accomplished, etc. What has the last year demonstrated about where your Product will be in January 2010?
- 9.2 WRITTEN ANSWER REQUIRED: Describe how you foresee development of the system over the next five years to meet all current and future requirements. Generally describe your future development plans for this product.
- 9.3 WRITTEN ANSWER REQUIRED: OHIONET and the Collaborative realize that the provision of an effective resource sharing process to all library patrons in a given region or state is a major undertaking. It will necessitate an on-going commitment and a willingness to adapt and modify both the Product and the procedures for making it available statewide. This will require OHIONET and the Collaborative to effectively partner with the selected Vendor to further develop the Product, enhance services, resolve problems, and, potentially, to even create new products and capabilities.

Describe how members of OHIONET and the Collaborative could work with you as a partner (e.g., focus groups, user surveys, beta-test sites, etc.). Include references to any track record of working with other school, library or educational networks to develop and make available your Product.

## **10.0 Evaluation Process**

### **10.1 RFP Evaluation Team (see also 1.16)**

All Vendor responses will be carefully evaluated and reviewed by the members of this Team. Team members will include representatives from the Collaborative. Various experts and outside agencies may also be consulted by the RFP Evaluation Team in the evaluation and selection process.

### **10.2 Proposal Evaluation Process**

The first step of the evaluation process of Vendor proposals will be a review of the format and section requirements specified in Section 2.0 of the RFP. If a Vendor's proposal meets these requirements, it will be included in the next step of the evaluation process. If a Vendor is not responsive to the requirements in step one, OHIONET and the State Library of Ohio shall have the right to disqualify the Vendor's proposal.

A subcommittee of the RFP Evaluation Team will then do a preliminary evaluation of all responses meeting the format and section requirements during the week of February 2-6, 2009 to determine which vendors are to be asked to do demonstrations during the week of February 16-20, 2009 in Columbus. Responses to all questions rated as Essential (see 10.2 below) will be individually read and assessed.

Members of the subcommittee will then do a preliminary ranking of the vendors submitting responses and will indicate which vendors they think should be invited to do demonstrations on the week of February 16-20, 2009. After discussing their ranking, members of the subcommittee will determine which vendors to ask to do demonstrations. To reach consensus, additional portions of a vendor's responses will be considered, as necessary. Vendors will be notified by telephone no later than 5pm on February 13, 2009 if they are scheduled to do a demonstration and will be informed of their assigned date and time.

Additional demonstrations may be scheduled after all members of the RFP Evaluation Team have completed the formal Q-SPAN evaluation (see below) of all vendor responses.

Electronic copies of all responses will be distributed to all members of the RFP Evaluation Team no later than Monday February 2, 2009. Those vendors invited to do demonstrations during the week of February 16-20, 2009 will be identified. Depending on the number of responses received, members of the RFP Evaluation Team will either evaluate all of the responses before the demonstrations or, if there are a large number of responses, initially evaluate only the responses of those vendors doing demonstrations.

In the former case, Team members will use their initial evaluation to question the

vendors during the demonstrations during the week of February 16-20, 2009. Ratings may change, based on the demonstrations and answers provided by the vendors. In the latter case, evaluations of the other vendors, including a recommendation of whether they should also be invited to do a demonstration, will be completed no later than February 13, 2009.

All responses from all vendors will consequently be evaluated individually by the members of the RFP Evaluation Team using the following process.

The RFP Evaluation Team will evaluate each Vendor's responses to the specifications in Sections 3.0 through 9.0 of this RFP: Authentication, Patron Interface, Library Functions, System Functions, Management & Support, Training and Documentation, and Planning for Development. This step may also entail checking references.

Responses to each specification will be evaluated and given a technical score by each member of the RFP Evaluation Team. Initial scoring will be done according to a QSPAN scale (Q, Question; S, Superior; P, Positive; A, Available; and N, Negative)

A Vendor shall receive a "**Q**" or "**questions**" rating for a response to a specific specification which is unclear and may need a clarification from the Vendor. A **Q** can also be given for those specifications which are unclear or because the evaluator wants to ask a question at the next committee meeting.

A Vendor shall receive an "**S**" or "**superior**" rating for a response to a specific specification which, when compared to other responses, is clearly superior, more innovative, or exceptional. It is not expected that more than 1-2 **S** ratings will be given for any specific specifications.

A Vendor shall receive a "**P**" or "**positive**" rating for a response to a specific specification which clearly meets or exceeds the specification (e.g., the capability is available with few or minor deviations or variations).

A Vendor shall receive an "**A**" or "**available**" rating for a response to a specific specification which is available, but which is not clearly superior or better than other responses. **A** could also be considered "average" and could be given across the board to all Vendors who routinely meet a specification with no real qualitative differences.

A Vendor shall receive an "**N**" or "**negative**" rating for a response to a specific specification which does not meet the requirements of the specification. The response may simply be unsatisfactory, unworkable, unresponsive, or inferior to other responses.

Team members can use an asterisk with any response to signify a concern that a response is either in "Test" or in "Development."

It is important that the members of the RFP Evaluation Team have access to the

Systems being proposed when this initial individual evaluation is undertaken. See 1.18.4 (RFP Systems to be Evaluated) for additional details.

After completing their individual initial evaluations by February 20, 2009 the RFP Evaluation Team will forward their scoring to the State Library of Ohio, attention David Namiotka, Director, Information Systems and Technology. The State Library of Ohio will compile and report the results of all ratings to the RFP Evaluation Team members on February 24, 2009.

The RFP Evaluation Team will meet the week of March 2, 2009 to further evaluate the responses and to discuss their individual rankings of the responses to individual specifications. The Team may forward to specific Vendors a list of Q-rated responses for additional information or clarification of the Vendor's responses after this meeting. The Vendor shall have several days, to be specified at the time the questions are sent, to provide written responses to the Q-rated specifications. The RFP Evaluation Team may also give a Vendor the opportunity to correct defects in its Proposal if it believes doing so does not result in an unfair advantage for the Vendor and it is in OHIONET and the State Library's interests to do so. Finally, the Team will determine if additional vendor demonstrations are required.

Each Team member will have the opportunity to adjust previously assigned scores due to the on-going discussion, review, and demonstrations. Each of the Q ratings will now be given an S, P, A, or N rating based on the RFP Evaluation Team's evaluation of the information provided by the Vendor and/or any presentation by the Vendor. At this point, final scoring will be completed as outlined below.

#### Weighting of Specifications

Specifications are rated as: ESSENTIAL, VERY IMPORTANT, IMPORTANT, or DESIRABLE.

These ratings are weighted as follows:

- Essential (**E**) 100 points maximum
- Very Important (**V**) 50 points maximum
- Important (**I**) 20 points maximum
- Desirable (**D**) 10 points maximum

The specifications have been assigned the ratings enumerated in Table 1:

**TABLE I: Specifications & Assigned Ratings**

3.1	V	4.12.1	D	4.31.3	V	4.49.5	D	5.27	V	6.25	E
3.2	V	4.12.2	D	4.32	I	4.49.6	D	5.28	I	6.26	E
3.3	E	4.12.3	D	4.32.1	D	4.50	I	5.29	V	6.27	E
3.4	V	4.13	E	4.32.2	D	4.51	I	5.30	D	6.28	I
3.5	I	4.14.1	D	4.32.3	I	4.52	D	5.30.1	I	6.29	E
3.6	V	4.14.2	D	4.33	I	4.52.1	I	5.31	D	6.30	I
3.7	D	4.15.1	I	4.34.1	D	4.53	D	5.31.1	I	6.31	D
3.8	V	4.15.2	D	4.34.2	D	4.54	D	5.32	D	7.1	V
3.9	D	4.16	D	4.34.3	V	4.54.1	I	6.1	E	7.2	I
3.9.1	I	4.17	D	4.35	D	4.55	I	6.1.1	V	7.3	I
3.10	D	4.18	I	4.36	V	4.56	D	6.1.2	I	7.4	I
3.10.1	I	4.18.1	E	4.36.1	V	5.1	V	6.1.3	V	7.4.1	I
3.11	I	4.19	I	4.37	V	5.2	D	6.2	E	7.5	I
3.11.1	I	4.19.1	I	4.38	D	5.2.1	D	6.3	E	7.5.1	I
3.12	I	4.20	I	4.38.1	I	5.2.2	D	6.4	E	7.6	D
3.12.1	I	4.20.1	V	4.38.2	D	5.2.3	D	6.5	V	7.7.1	D
3.13	D	4.21.1	I	4.39	I	5.3	D	6.6	V	7.7.2	D
3.14	D	4.21.2	I	4.39.1	I	5.4	D	6.7	I	7.7.3	D
3.14.1	I	4.21.3	D	4.40	I	5.4.1	I	6.8	I	7.7.4	I
3.15	I	4.21.4	D	4.40.1	V	5.5	E	6.9	I	7.7.5	I
3.16	V	4.21.5	I	4.41	D	5.6	I	6.9.1	I	7.7.6	D
3.17	I	4.21.6	D	4.41.1	I	5.6.1	V	6.9.2	I	7.7.7	D
3.17.1	I	4.21.7	D	4.42	D	5.7	V	6.10	I	7.8	V
4.1.1	I	4.21.8	I	4.42.1	I	5.8	V	6.11	I	7.9	I
4.1.2	I	4.21.9	D	4.43	I	5.9	I	6.12	E	7.10	V
4.1.3	I	4.21.10	D	4.43.1	I	5.10	E	6.13.1	E	7.11	V
4.1.4	I	4.22.1	I	4.44	I	5.11	V	6.13.2	E	7.12	E
4.1.5	D	4.22.2	D	4.45	D	5.12	I	6.13.3	E	7.13	I
4.1.6	D	4.22.3	D	4.45.1	I	5.13	D	6.13.4	E	7.14	V
4.2.1	I	4.22.4	I	4.46	I	5.13.1	D	6.13.5	E	7.15	I
4.2.2	D	4.22.5	D	4.46.1	I	5.14	D	6.13.6	E	8.1	E
4.2.3	D	4.22.6	D	4.47	I	5.14.1	D	6.13.7	E	8.2	V
4.2.4	I	4.23.1	D	4.47.1	I	5.15	D	6.13.8	E	8.3	V
4.2.5	I	4.23.2	I	4.48.1	D	5.16	I	6.13.9	E	8.4	I
4.2.6	I	4.23.3	I	4.48.2	D	5.17	D	6.13.10	E	8.5	D
4.2.7	D	4.23.4	I	4.48.3	D	5.17.1	I	6.14	D	8.5.1	I
4.3	I	4.23.5	D	4.48.4	D	5.18	I	6.15	V	9.1	V
4.4	D	4.24	I	4.48.5	D	5.19	I	6.16	I	9.2	I
4.5	D	4.25	V	4.48.6	D	5.20	V	6.17	I	9.3	E
4.5.1	D	4.26	I	4.48.7	D	5.21	I	6.18	I		
4.6	D	4.26.1	I	4.48.8	D	5.22	D	6.19	I		
4.7	D	4.27	E	4.48.9	D	5.22.1	D	6.20	V		
4.8	I	4.28	I	4.48.10	I	5.23	V	6.21	V		
4.9	I	4.29	E	4.49.1	D	5.24	I	6.22	V		
4.9.1	I	4.30	E	4.49.2	D	5.25	I	6.23	I		
4.10	I	4.31.1	V	4.49.3	D	5.25.1	I	6.24	E		
4.11	I	4.31.2	D	4.49.4	D	5.26	D				

## Proposal Scoring

Proposal scoring is based on the number of S, P, A, and N ratings assigned by RFP Evaluation Team members. To get the maximum number of points, a specification must receive SUPERIOR ratings from all members of the Team.

The following scoring range will be used:

- S (Superior) 100%
- P (Positive) 80%
- A (Available) 60%
- N (Negative) 0%

### Example (based on a Team of six members)

The final SPAN scores for an ESSENTIAL specification (100 points maximum) are:

Superior 100 pts x 100% =	100 points
Positive 100 pts x 80% =	80 points
Positive 100 pts x 80% =	80 points
Available 100 pts x 60% =	60 points
Available 100 pts x 60% =	60 points
Negative 100 pts x 0% =	0 points

Total: 380 pts / 6 = 63.33 points

If a status response is given as T (Testing), only 80% of the final point total will be used. If a status response is given as D (Development), only 50% of the final point total will be used.

Once the above has been calculated for each specification, the individual specification scores will be totaled for each prospective Vendor.

The Team will review the results and will also take into consideration the other factors stipulated in the RFP, including but not limited to: experience of the Vendor, the Vendor's financial condition, the Vendor's conduct and performance on previous contracts, the Vendor's facilities, the Vendor's managerial and operational skills, and the Vendor's ability to execute the contract properly. The Team will then compile and submit a formal recommendation to the State Librarian.

## **11.0 Terms and Conditions**

### **11.1 Contract**

The Contract ("Contract") shall consist of this RFP as modified by any addenda issued by OHIONET, the acceptable Vendor's proposal, the executed Agreement for the System and any purchase orders issued under the contract.

### **11.2 Headings**

The headings used in this RFP are for convenience only and shall not affect the interpretation of any of the terms, conditions, and requirements hereof.

### **11.3 Related Contracts**

After award of the Contract, the Vendor shall not hire or use subcontractors without prior written approval from OHIONET.

### **11.4 Conflicts of Interest**

No personnel of the Vendor or member of the governing body of an locality, or other public official or employee of any such locality in which, or relating to which, the work under the Contract is being carried out, and who exercises any functions or responsibilities in connection with the review or approval of the undertaking or carrying out of any such work, shall prior to the completion of said work, voluntarily acquire any personal interest, direct or indirect, which is incompatible, or in conflict with the discharge and fulfillment of such person's functions and responsibilities with respect to the carrying out of said work. Any such person who acquires an incompatible or conflicting personal interest, prior to, on or after the effective date of the Contract, or who involuntarily acquires any such incompatible or conflicting personal interest, shall immediately disclose his or her interest to the State in writing. Thereafter, such person shall not participate in any action affecting the work under the contract, unless OHIONET and the State Library shall determine that in the light of the personal interest disclosed, such person's participation in any such action would not be contrary to the public interest.

### **11.5 Time of Performance**

The Contract shall be binding upon both parties approval of the Ohio State Controlling Board and receipt of a fully executed OHIONET and the State Library purchase order.

### **11.6 Record Keeping Requirements**

The Vendor shall keep all financial records in a manner consistent with generally accepted accounting principles. Documentation to support each action shall be filed in a

manner allowing it to be readily located.

All disbursements made for the Contract shall be only for obligations incurred in the performance of the Contract and shall be supported by contracts, invoices, vouchers, and other data as appropriate to support such disbursements. All disbursements for the contract shall be for obligations incurred only after the effective date of the Contract, unless specific authorization for prior disbursements has been given in writing by OHIONET and the State Library.

During the period covered by the Contract, and until the expiration of three (3) years after final payment under the Contract, the Vendor agrees to provide OHIONET and the State Library with financial support for the work undertaken with access to and the right to examine any books, documents, papers, and records of the Vendor involving transactions related to the Contract.

#### 11.7 Performance and Acceptance

Acceptance will be specified in the contract. As currently envisioned, OHIONET and the State Library of Ohio expect the selected vendor to agree to provide a test system for Ohio libraries to view with interoperability with no fewer than three disparate catalogs live by December 1, 2009. Catalogs will be identified by the Collaborative from the included list(see 6.13). At this point, OHIONET will initially accept the system (see below).

A fully functioning system with seamless interoperability with 5 disparate ILSs, as specified by the Collaborative, is expected by February 2010.

Acceptance of the vendor's System is dependent upon a thirty (30) calendar day successful standard of performance as defined herein, and as stipulated in the contract.

The Vendor will notify OHIONET and the State Library when the System is installed and operational and the thirty (30) day performance period is ready to begin for each of the milestones described above. This notification shall be made in writing. Upon successful completion of the performance period, OHIONET and the State Library will notify the Vendor of initial acceptance in writing.

The System shall not be accepted until the Performance Period is complete. Should it be necessary, OHIONET and the State Library may delay the start of the Performance Period, but such delay shall not exceed thirty (30) consecutive calendar days after the scheduled start date. Unless otherwise mutually agreed to by OHIONET and the State Library and the Vendor, the Performance Period shall start no later than the thirty-first (31<sup>st</sup>) day after the scheduled date.

## Appendix A

### Ohio Public Library Automation Vendors

<b>Library</b>	<b>Current ILS Vendor</b>	<b>Product</b>	<b>Release Version</b>
Ada Public School District Library	SirsiDynix	Horizon	7.3.4
Adams County Public Library	SirsiDynix	Horizon	7.3.4
Akron-Summit Cnty Public Library	SirsiDynix	Classic	not provided
Alexandria Public Library	SirsiDynix	Horizon	7.4
Alger Public Library	SirsiDynix	Horizon	7.3.4
Amherst Public Library	The Library Corporation	Library.Solution	unknown
Andover Public Library	Follett	Circulation Plus	5.1
Arcanum Public Library	Follett	Spectrum	CIRC/CAT 5.3
Archbold Community Library	The Library Corporation	Library.Solution	not provided
Ashland Public Library	SirsiDynix	Unicorn	2003.1.4.4
Ashtabula Cnty District Library	SirsiDynix	Horizon	7.3.4
Athens County Public Libraries	LibLime	Koha	3.0
Auglaize County District Public Library	Polaris	ILS	3.3
Avon Lake Public Library	SirsiDynix	Unicorn	GL3.1
Barberton Public Library	Open source	Koha	2.X
Barnesville Hutton Memorial Public Library	SirsiDynix	Horizon	7.3.4
Bellaire Public Library	SirsiDynix	Horizon	7.3.4
Belle Center Free Public Library	no online catalog		
Bellevue Public Library	SirsiDynix	Symphony	3.2
Bettsville Public Library	no website or online catalog		
Bexley Public Library	Innovative Interfaces	Millennium	6
Birchard Public Library Of Sandusky County	SirsiDynix	Symphony	3.2
Blanchester Public Library	SirsiDynix	Horizon	7.3.2
Bliss Memorial Public Library	SirsiDynix	Horizon	7.3.4
Bluffton Public Library	SirsiDynix	Unicorn	GL 3.1
Bowerston Public Library	SirsiDynix	Horizon	7.3.4
Bradford Public Library	SirsiDynix	Horizon	7.3.4
Briggs Lawrence County Public Library	The Library Corporation	Library.Solution	3.5
Bristol Public Library	The Library Corporation	Library.Solution	3.3.5
Brown County Public Library	Sagebrush	Spectrum	5.3
Brown Memorial Library	SirsiDynix	Horizon	7.3.4
Brumback Library	SirsiDynix	Horizon	3.06A
Bucyrus Public Library	The Library Corporation	Library.Solution	3.3.5
Burton Public Library	SirsiDynix	Symphony	3.2
Caldwell Public Library	SirsiDynix	Horizon	7.3.4
Canal Fulton Public Library	SirsiDynix	Horizon	7.3.4
Cardington-Lincoln Public Library	Winnebago	Spectrum	5.3

Carnegie Public Library - East Liverpool	The Library Corporation	Library.Solution	3.3.5
Carnegie Public Library - Washington Court House	SirsiDynix	Horizon	7.3.4
Carroll County District Library	SirsiDynix	Horizon	7.3.4
Centerburg Public Library	Winnebago	Spectrum	5.0
Champaign County Library	The Library Corporation	Library.Solution	3.3.5
Chillicothe And Ross County Public Library	SirsiDynix	Horizon	7.3.4
Cincinnati And Hamilton County, PI Of	SirsiDynix	Unicorn	GL3.1
Clark County Public Library	Polaris	ILS	3.3
Claymont School District Public Library	SirsiDynix	Horizon	7.3.4
Clermont County Public Library	Innovative Interfaces	Millennium	2006 1.2
Cleveland Heights-University Heights PI	SirsiDynix	Symphony	3.2
Cleveland Public Library	SirsiDynix	Symphony	3.2
Clyde Public Library	SirsiDynix	Symphony	3.2
Coldwater Public Library	SirsiDynix	Horizon	7.4
Columbiana Public Library	The Library Corporation	Library.Solution	3.3.5
Columbus Metropolitan Library	None	n/a	n/a
Community Library - Sunbury	The Library Corporation	Library.Solution	3.5
Conneaut Carnegie Library	Follett	not provided	not provided
Coshocton Public Library	SirsiDynix	Horizon	7.3.4
Crestline Public Library	The Library Corporation	Library.Solution	3.3.5
Cuyahoga County Public Library	Innovative Interfaces	Millennium	2006 1.3
Cuyahoga Falls Library	Innovative Interfaces	Millennium	not provided
Dayton Metro Library	SirsiDynix	Horizon	7.3.4
Defiance Public Library	SirsiDynix	Horizon	7.3.4
Delaware County District Library	Innovative Interfaces	not provided	not provided
Delphos Public Library	SirsiDynix	Horizon	191
Delta Public Library	Open source	Koha	migrating to 3
Dorcas Carey Public Library	SirsiDynix	Horizon	7.3.4
Dover Public Library	Polaris	ILS	3.1
Dr. Earl S. Sloan Library	no website or online catalog		
Dr. Samuel L. Bossard Memorial Library	Polaris	ILS	3.2
East Cleveland Public Library	SirsiDynix	Symphony	3.2
East Palestine Memorial Public Library	Follett Sagebrush	Infocentre	3.0
Elyria Public Library	SirsiDynix	Symphony	3.2
Euclid Public Library	SirsiDynix	Symphony	3.2
Evergreen Community Library	Polaris	ILS	not provided
Fairfield County District Library	SirsiDynix	Horizon	7.4
Fairport Harbor Public Library	SirsiDynix	Symphony	3.2
Findlay Hancock Cnty Dist Public Library	SirsiDynix	Horizon	7.3.4
Flesh Public Library	The Library Corporation	Library.Solution	unknown
Forest-Jackson Public Library	SirsiDynix	Horizon	7.3.4
Fort Recovery Public Library	SirsiDynix	Horizon	7.3.4
Franklin-Springboro Public Library	Polaris	ILS	3.3

Galion Public Library Association	Polaris	ILS	3.3
Garnet A. Wilson Pl Of Pike Co	The Library Corporation	Library.Solution	3.3
Geauga County Public Library	SirsiDynix	Classic	191
Germantown Public Library	SirsiDynix	Horizon	7.3.4
Girard Free Library	The Library Corporation	Library.Solution	3.3.5
Gnadenhutten P.L./Indian Valley School Dist.	Follett	Sagebrush Infocentre	2.2
Grafton/Midview Public Library	The Library Corporation	Library.Solution	1.4.200
Grand Valley Public Library	SirsiDynix	Horizon	7.3
Grandview Heights Public Library	SirsiDynix	Horizon	7.4
Granville Public Library	SirsiDynix	Horizon	7.4
Greene County Public Library	Innovative Interfaces	Millennium	2007J
Greenville Public Library	Polaris	ILS	unknown
Guernsey County District Public Library	SirsiDynix	Horizon	7.3.4
Harbor-Topky Memorial Library	SirsiDynix	Horizon	7.3.4
Hardin Northern Public Library	SirsiDynix	Horizon	7.3.4
Harris-Elmore Public Library	SirsiDynix	Horizon	7.3.4
Henderson Memorial Library Assoc.	SirsiDynix	Horizon	7.3.4
Herbert Wescoat Memorial Library	The Library Corporation	Library.Solution	3.3.5
Herrick Memorial Public Library	The Library Corporation	Library.Solution	3.2
Highland County District Library	SirsiDynix	Horizon	7.3.4
Holgate Community Library	SirsiDynix	Horizon	7.3.4
Holmes County District Public Library	SirsiDynix	Horizon	7.3.4
Homer Public Library	Follett	Spectrum	5.2
Hubbard Public Library	The Library Corporation	Library.Solution	3.3.5
Hudson Library And Historical Society	SirsiDynix	Symphony	3.2
Huron Public Library	SirsiDynix	Symphony	3.2
Hurt/Battelle Memorial Library	Follett Sagebrush	Spectrum	5
Ida Rupp Public Library	SirsiDynix	Horizon	7.3.4
J.R. Clarke Public Library	Follett	Sagebrush Spectrum	5.3
Jackson City Library	The Library Corporation	Library.Solution	3.3
Kate Love Simpson-Morgan County Library	SirsiDynix	Horizon	7.3.4
Kaubisch Memorial Public Library	SirsiDynix	Unicorn Workflows	2003.1.4.5
Kent Free Library	Innovative Interfaces	not provided	not provided
Kingsville Public Library	SirsiDynix	Horizon	7.3.4
Kinsman Free Public Library	The Library Corporation	Library.Solution	3.3.5.7
Kirtland Public Library	SirsiDynix	Symphony	3.2
Lakewood Public Library	SirsiDynix	Unicorn	2003.1.4.5
Lane Public Library	SirsiDynix	Horizon	7.3.4
Lebanon Public Library	Follett Sagebrush	Infocentre	unknown
Leetonia Community Public Library	Follett	Circulation Plus	6.3

Lepper Library	Polaris	ILS	3.3
Liberty Center Public Library	SirsiDynix	Horizon	7.3.4
Lima Public Library	The Library Corporation	Library.Solution	3.3
Logan County District Library	SirsiDynix	Unicorn	2003.1.4.5
Logan-Hocking County District Library	Follett	Circulation Plus	6.2
London Public Library	Polaris	ILS	3.2
Lorain Public Library	SirsiDynix	Symphony	3.2
Loudonville Public Library	SirsiDynix	Horizon	7.3.4
Louisville Public Library	Innovative Interfaces	Millennium	not provided
Madison Public Library	SirsiDynix	Symphony	3.2.0.0
Mansfield-Richland County Public Library	SirsiDynix	Horizon	unknown
Marion Lawrence Memorial Library	SirsiDynix	Unicorn	no answer
Marion Public Library	SirsiDynix	Unicorn	GL 3.1
Martins Ferry Public Library	SirsiDynix	Horizon	7.3.4
Marvin Memorial Library	SirsiDynix	Unicorn	not provided
Mary L. Cook Public Library	Polaris	3.3	Only the Polaris upgrades
Mary Lou Johnson-Hardin Cnty PI	Polaris	ILS	3.3
Marysville Public Library	SirsiDynix	Horizon	7.4
Mason Public Library	Polaris	ILS	3.2
Massillon Public Library	SirsiDynix	Classic	not provided
McComb Public Library	Polaris	Integrated Library System	3.2
McKinley Memorial Library	The Library Corporation	Library.Solution	3.3.5
Mechanicsburg Public Library	The Library Corporation	Library.Solution	Circulation v 3.3.5.11 Cataloging v 3.3.5.18
Medina County District Library	SirsiDynix	Symphony	3.2
Meigs County District Public Library	The Library Corporation	Library.Solution	3.3.5
Mentor Public Library	SirsiDynix	Classic	not provided
Mercer County Dist. Public Library	SirsiDynix	Horizon	7.3.4
Middletown Public Library	SirsiDynix	Classic	191
Milan-Berlin Tnsp PI/Berlin Milan Local Sd	SirsiDynix	Symphony	3.2
Milton Union Public Library	SirsiDynix	Horizon	7.3.4
Minerva Public Library	SirsiDynix	Horizon	7.3.4
Mohawk Community Library	SirsiDynix	Horizon	7.3.4
Monroe County District Library	SirsiDynix	Horizon	7.3.4
Monroeville Public Library	SirsiDynix	Horizon	7.3.4
Montpelier Public Library	SirsiDynix	Horizon	7.3.4
Morley Library	The Library Corporation	Library.Solution	3.3.5
Mt Gilead Free Public Library	Follett Sagebrush	Spectrum	5
Mt Sterling Public Library	SirsiDynix	Horizon	7.3.4
Mt Vernon & Knox County, Public Library Of	Polaris	ILS	3.3
Muskingum County Library System	The Library Corporation	Library.Solution	3.3
Napoleon Public Library	Polaris	ILS	unknown

New Carlisle Public Library	SirsiDynix	Horizon	7.3.4
New London Public Library	SirsiDynix	Horizon	7.3.4
New Madison Public Library	SirsiDynix	Horizon	7.3.4
New Straitsville Public Library	COMPanion Corporation	Alexandria	unknown
Newark Public Library	SirsiDynix	Horizon	7.4
Newcomerstown Public Library	SirsiDynix	Horizon	7.3.4
Newton Falls Public Library	The Library Corporation	Library.Solution	3.3.5
Normal Memorial Library	SirsiDynix	Horizon	7.3.4
North Baltimore Public Library	SirsiDynix	Horizon	7.3.4
North Canton Public Library	Polaris	ILS	3.3.721
Norwalk Public Library	Polaris	ILS	3.3
Oak Harbor Public Library	SirsiDynix	Horizon	7.3.4
Oak Hill Public Library	The Library Corporation	Library.Solution	3.3
Oberlin Public Library	The Library Corporation	Library.Solution	3.2
Orrville Public Library	SirsiDynix	Symphony	3.2
Pataskala Public Library	The Library Corporation	Library.Solution	3.3.5
Patrick Henry School District Public Library	SirsiDynix	Horizon	7.3.4
Paulding County Carnegie Library	Polaris	ILS	3.2
Pemberville Public Library	SirsiDynix	Horizon	7.3.4
Peninsula Library & Historical Society	SirsiDynix	Symphony	3.2
Perry Cook Memorial Public Library	no website or online catalog		
Perry County District Library	SirsiDynix	Horizon	7.3.4
Perry Public Library	SirsiDynix	Symphony	3.2
Pickaway Cnty District Public Library	SirsiDynix	Horizon	7.4
Pickerington Public Library	SirsiDynix	Horizon	7.4
Plain City Public Library	SirsiDynix	Horizon	7.4
Portage County District Library	Innovative Interfaces	Millennium	2006 1.3
Porter Public Library	SirsiDynix	Unicorn	GL 3.1.2.1
Portsmouth Public Library	The Library Corporation	Library.Solution	3.3.5
Preble County District Library	SirsiDynix	Unicorn	not provided
Puskarich Public Library	SirsiDynix	Horizon	7.3.4
Putnam County District Library	SirsiDynix	Unicorn Workflows	GL 3.1
Reed Memorial Library	Innovative Interfaces	Millennium	2006 version 1.3 (release 2007)
Richwood-North Union Public Library	Winnebago no website or online catalog		
Ridgemont Public Library	SirsiDynix	Horizon	7.3.4
Ritter Public Library	SirsiDynix	Symphony	3.2
Rock Creek Public Library	SirsiDynix	Horizon	7.3.4
Rockford Carnegie Library	SirsiDynix	Horizon	7.3.4
Rocky River Public Library	SirsiDynix	Unicorn	GL 3.1

Rodman Public Library	Innovative Interfaces	Millennium	2006
Rossford Public Library	SirsiDynix	Horizon	7.3.4
Sabina Public Library	SirsiDynix	Horizon	unknown
Salem Public Library	Polaris	ILS	3.3
Salem Township Public Library	Follett	Infocentre	2.3
Sandusky Library	SirsiDynix	Symphony	3.2
Selover Public Library	Follett	Spectrum	not provided
Seneca East Public Library	SirsiDynix	Horizon	7.3.4
Shaker Heights Public Library	SirsiDynix	Symphony	3.2
Shelby County Libraries	The Library Corporation	Library.Solution	3.3.5
Southwest Public Libraries	None	n/a	n/a
St. Clairsville Public Library	SirsiDynix	Horizon	7.3.4
St. Marys Community Library	SirsiDynix	Horizon	7.3.4
St. Paris Public Library	The Library Corporation	Library.Solution	3.3
Stark County District Library	Innovative Interfaces	Millennium	not provided
Steubenville & Jefferson County, PI Of	SirsiDynix	Horizon	7.3.4
Stow-Munroe Public Library	LibLime	Koha	unknown
Swanton Public Library	Polaris	ILS	3.3
Sylvester Memorial Wellston Public Library	The Library Corporation	Library.Solution	3.3.0.21
Tiffin-Seneca Public Library	Civica	Spydus	unknown
Tipp City Public Library	SirsiDynix	Horizon	7.3.4
Toledo-Lucas County Public Library	Innovative Interfaces	Millennium	2006
Troy-Miami County Public Library	SirsiDynix	Horizon	7.4
Tuscarawas County Public Library	SirsiDynix	Horizon	7.3.4
Twinsburg Public Library	SirsiDynix	Symphony	3.2
Union Township Public Library	SirsiDynix	Horizon	7.3.4
Upper Arlington Public Library	VTLS	Virtua	48.1.1
Upper Sandusky Community Library	SirsiDynix	Horizon	7.3.4
Wadsworth Public Library	Innovative Interfaces	Millennium	not provided
Wagnalls Memorial Library	SirsiDynix	Horizon	7.4
Warren-Trumbull County Public Library	Innovative Interfaces	Millennium	2006
Washington County Public Library	SirsiDynix	Horizon	7.3.4
Washington-Centerville Public Library	Innovative Interfaces	Millennium	2006 1.3. Expect to be on 2007 release by end of April 2008
Wauseon Public Library	SirsiDynix	Horizon	7.3.4
Way Public Library	SirsiDynix	Horizon	7.3.4
Wayne County Public Library	SirsiDynix	Symphony	3.2
Wayne Public Library	SirsiDynix	Horizon	7.3.4
Wellsville Carnegie Public Library	Polaris	ILS	3.3
Westerville Public Library	Innovative Interfaces	Millennium & Encore	not provided
Weston Public Library	SirsiDynix	Horizon	7.3.4
Wickliffe Public Library	SirsiDynix	Symphony	3.2
Willard Memorial Library	SirsiDynix	Horizon	7.3.4
Williams Co Public Library	SirsiDynix	Horizon	7.3.4
Willoughby-Eastlake Public Library	SirsiDynix	Symphony	3.2

Wilmington Public Library Of Clinton County	SirsiDynix	Horizon	7.4.1
Wood County District Public Library	SirsiDynix	Horizon	7.3.4
Worch Memorial Public Library	The Library Corporation	Library.Solution	unknown
Wornstaff Memorial Public Library	Follett Sagebrush	Infocentre	2.3
Worthington Public Library	None	n/a	n/a
Wright Memorial Public Library	SirsiDynix	Classic	not provided
Youngstown And Mahoning County, PI Of	Innovative Interfaces	Millennium	not provided
	Shaded libraries did not respond (20)		

## Appendix B

### Ohio Consortia Defined

#### Ohio Library Consortia Defined

##### Central Library Consortium (CLC)

<http://clc.lib.oh.us>

The Central Library Consortium (CLC) is a Central Ohio Library system serving a four county area consisting of eight member libraries, seven branch libraries and two bookmobiles containing over 465,000 titles and 1,116,000 holdings.

Integrated Library System: SirsiDynix Horizon 7.4

Members:

- |                                      |                                |
|--------------------------------------|--------------------------------|
| 1. Alexandria Public Library         | 6. Pickerington Public Library |
| 2. Fairfield County District Library | 7. Plain City Public Library   |
| 3. Grandview Heights Public Library  | 8. Wagnalls Memorial Library   |
| 4. Marysville Public Library         |                                |
| 5. Pickaway County District Library  |                                |

##### CLEVNET

<http://cpl.org/clevnet-library-consortium.asp>

The CLEVNET consortium includes 30 library systems in 9 counties throughout Northern Ohio.

Integrated Library System: SirsiDynix Unicorn 3.1

- |  |  |
|--|--|
| 1. Bellevue Public Library                             | 16. Kirtland Public Library              |
| 2. Birchard Public Library                             | 17. Lorain Public Library                |
| 3. Burton Public Library                               | 18. Madison Public Library               |
| 4. Cleveland Public Library                            | 19. Medina County District Library       |
| 5. Cleveland Heights-University Heights Public Library | 20. Milan-Berlin Township Public Library |
| 6. Cleveland Law Library                               | 21. Orrville Public Library              |
| 7. Clyde Public Library                                | 22. Peninsula Library                    |
| 8. East Cleveland Public Library                       | 23. Perry Public Library                 |
| 9. Elyria Public Library                               | 24. Ritter Public Library                |
| 10. Euclid Public Library                              | 25. Sandusky Library                     |
| 11. Fairport Harbor Public Library                     | 26. Shaker Heights Public Library        |
| 12. Global Issues Resource Center (non-public)         | 27. Twinsburg Public Library             |
| 13. Hawken School (non-public)                         | 28. Wayne County Public Library          |
| 14. Hudson Library & Historical Society                | 29. Wickliffe Public Library             |
| 15. Huron Public Library                               | 30. Willoughby-Eastlake Public Library   |

##### Council of Ashtabula County Libraries (CACL)

<http://www.cacl.lib.oh.us/>

Integrated Library System: SirsiDynix Horizon 7.3.4

Members:

- |                                      |                                   |
|--------------------------------------|-----------------------------------|
| 1. Ashtabula County District Library | 7. Grand River Academy            |
| 2. Grand Valley Public Library       | 8. Grand Valley High School       |
| 3. Ashtabula County JVS              | 9. Jefferson Area High School     |
| 4. Conneaut High School              | 10. Pymatuning Valley High School |
| 5. Edgewood High School              | 11. Saints John & Paul School     |
| 6. Geneva High School                | 12. Geneva Middle School          |

### **CONSORT**

<http://consort.library.denison.edu/>

CONSORT is a consortium made up of four university libraries. This group also participates in OhioLINK.

1. Denison University
2. Kenyon College
3. Ohio Wesleyan University
4. The College of Wooster

### **Dayton Metro Library Consortium**

Integrated Library System: SirsiDynix Horizon 7.3.4

Members:

1. Bradford Public Library
2. Dayton Metro Library
3. Germantown Public Library
4. Troy-Miami County Public Library

### **Discovery Place Libraries**

Members:

1. Columbus Metropolitan Library
2. Southwest Public Libraries
3. Worthington Libraries

### **Independently Cooperating Ashtabula Network (ICAN)**

<http://www.icanlibraries.org/>

Integrated Library System: Koha Zoom

Members:

1. Andover Public Library
2. Conneaut Public Library
3. Harbor-Topky Memorial Library
4. Henderson Memorial Public Library
5. Kingsville Public Library
6. Rock Creek Public Library

### **INFOhio**

<http://www.infohio.org/>

INFOhio uses the Information Technology Centers (ITCs) of the Ohio Education Computer Network to provide MultiLIS and SirsiDynix K-12 library automation services for more than 2,400 schools in the state.

### **Licking County Library Cluster**

Integrated Library System: SirsiDynix Horizon 7.4

Members:

1. Granville Public Library
2. Licking County Library

### **Ohio Libraries Share: MORE**

<http://winslo.state.oh.us/more/index.html>

Ohio Libraries Share: MORE is a consortium of public, academic, school, and special libraries working across a variety of different library automation systems. Currently, approximately 17.8 million volumes are shared with more than 2.8 million Ohio students and library patrons. Ohio Libraries Share: MORE is funded through the State Library of Ohio with LSTA funds.

Members:

1. Alexandria Public Library (CLC)
2. Andover Public Library (ICAN)
3. Ansonia Local Schools
4. Arcanum Butler Local Schools
5. Archbold Community Library
6. Ashland Public Library
7. Ashtabula County District Library (CACL)
8. Ashtabula County Joint Vocational School

9. Athens County Public Libraries
10. Auglaize County Public District Library
11. Barberton Public Library
12. Beachwood City Schools
13. Bluffton Public Library
14. Bradford Public Library (Dayton Metro Library Consortium)
15. Bristol Public Library (TIPL)
16. Brumback Library
17. Champaign County Public Library
18. Clark County Public Library
19. Clermont County Public Library
20. Cleveland Heights-University Heights City School District
21. Cleveland Heights-University Heights Library (CLEVNET)
22. Cleveland Public Library (CLEVNET)
23. Columbiana Public Library
24. Community Library – Sunbury
25. Conneaut High School
26. Conneaut Public Library (ICAN)
27. Dayton Metro Library (Dayton Metro Library Consortium)
28. Delaware Joint Vocation Schools
29. Delphos Public Library
30. Delta Public Library
31. Dr. Samuel L. Bossard Memorial Library of Gallia County
32. East Cleveland Public Library (CLEVNET)
33. East Palestine Public Library
34. Edgerton Local Schools
35. Edgewood Sr High School (Ashtabula)
36. Edison Local Schools
37. Elyria Public Library (CLEVNET)
38. Evergreen Local Schools
39. Fairfield County District Library (CLC)
40. Fairfield Local Schools
41. Franklin-Monroe Local Schools
42. Galion City Schools
43. Garnet A. Wilson Public Library
44. Geauga County Public Library
45. Geneva High Schools
46. Germantown Public Library (Dayton Metro Library Consortium)
47. Girard Free Library (TIPL)
48. Grand River Academy High School
49. Grand Valley Public Library (CACL)
50. Grandview Heights Public Library (CLC)
51. Granville Public Library (Licking County Library Cluster)
52. Greenville City Schools
53. Greenville Public Library
54. Harbor-Topky Memorial Library (ICAN)
55. Henderson Memorial Library Association (ICAN)
56. Herrick Memorial Library
57. Hubbard Public Library (TIPL)
58. Huron Public Library (CLEVNET)
59. Hurt/Battelle Public Library – West Jefferson
60. Indian Creek Local Schools
61. Jefferson Area Jr/Sr High School
62. Kaubisch Memorial Public Library
63. Kingsville Public Library (ICAN)
64. Kinsman Free Public Library (TIPL)
65. Lane Public Library
66. Leetonia Public Library
67. Licking County Library (Licking County Library Cluster)
68. Logan County District Library
69. Logan Hocking Public Library
70. Mansfield/Richland County Public Library
71. Marysville Public Library (CLC)
72. McComb Public Library
73. McKinley Memorial Library (TIPL)
74. Meigs County District Library
75. Miami East Local Schools
76. Millcreek-West Unity Local Schools
77. Mississinawa Valley Local Schools
78. Monroeville Local Schools
79. Morley Library
80. Muskingum County Public Library
81. Newark City Schools
82. Newton Falls Public Library (TIPL)
83. Norwalk Public Library
84. Paulding County Carnegie Library
85. Pickaway County District Library (CLC)
86. Pickerington Public Library (CLC)
87. Plain City Public Library (CLC)
88. Preble County District Library (Preble County District Library System)
89. Putnam County District Library
90. Pymatuning Valley High School
91. Riverdale Local Schools
92. Rock Creek Public Library (ICAN)
93. Rocky River Public Library
94. Salem Public Library
95. Salem Township Public Library
96. Scarlet Oaks Career Campus
97. Southern Local Schools
98. State Library of Ohio (OhioLINK)
99. Stow-Munroe Falls Public Library
100. Swanton Public Library
101. Tiffin-Seneca Public Library
102. Troy-Miami County Public Library (Dayton Metro Library Consortium)
103. Tuslaw Local Schools
104. Upper Arlington Public Library
105. Versailles Exempted Village Schools
106. Wickliffe Public Library (CLEVNET)
107. Wilmington Public Library
108. Worch Memorial Library
109. Wornstaff Memorial Public Library

110. Wright Memorial Public Library

### Ohio Private Academic Libraries (OPAL)

<http://www.opal-libraries.org/index.php/about/>

Consortium of private academic libraries offering over one million titles and three million individual items to the patrons of 23 libraries. Consortium participates in OhioLINK.

- |  |                                     |
|--|-------------------------------------|
| 1. Antioch College                       | 13. Mount Carmel College of Nursing |
| 2. Athenaeum of Ohio                     | 14. Mount Union College             |
| 3. Baldwin Wallace College               | 15. Muskingum College               |
| 4. Bluffton University                   | 16. Otterbein College               |
| 5. Columbus College of Art & Design      | 17. Pontifical College Josephinum   |
| 6. Defiance College                      | 18. Tiffin University               |
| 7. Franciscan University                 | 19. University of Findlay           |
| 8. Heidelberg College                    | 20. Urbana University               |
| 9. Lourdes College                       | 21. Walsh University                |
| 10. Malone College                       | 22. Wilberforce University          |
| 11. Mercy College                        | 23. Wilmington College              |
| 12. Methodist Theological School in Ohio |                                     |

### OhioLINK

<http://www.ohiolink.edu/>

The Ohio Library and Information Network, OhioLINK, is a consortium of 86 Ohio college and university libraries, and the State Library of Ohio, that work together to provide Ohio students, faculty and researchers with the information they need for teaching and research. Serving more than 600,000 students, faculty, and staff at 87 institutions, OhioLINK's membership includes 16 public/research universities, 23 community/technical colleges, 47 private colleges and the State Library of Ohio.

Members:

- |  |   |
|--|---|
| 1. Antioch College (OPAL)                            | 29. Heidelberg College (OPAL)                   |
| 2. Ashland University                                | 30. Hiram College                               |
| 3. Athenaeum of Ohio (OPAL)                          | 31. Hocking College                             |
| 4. Baldwin-Wallace College (OPAL)                    | 32. Jefferson Community College                 |
| 5. Belmont Technical College                         | 33. John Carroll University                     |
| 6. Bluffton University (OPAL)                        | 34. Kent State University                       |
| 7. Bowling Green State University                    | 35. Kent State University - Ashtabula           |
| 8. Bowling Green State University - Firelands        | 36. Kent State University - East Liverpool      |
| 9. Capital University                                | 37. Kent State University - Geauga              |
| 10. Case Western Reserve University                  | 38. Kent State University - Salem               |
| 11. Cedarville University                            | 39. Kent State University - Stark               |
| 12. Central Ohio Technical College                   | 40. Kent State University - Trumbull            |
| 13. Central State University                         | 41. Kent State University - Tuscarawas          |
| 14. Cincinnati Christian University                  | 42. Kenyon College (CONSORT)                    |
| 15. Cincinnati State Technical and Community College | 43. Lakeland Community College                  |
| 16. Clark State Community College                    | 44. Lorain County Community College             |
| 17. Cleveland Clinic                                 | 45. Lourdes College (OPAL)                      |
| 18. Cleveland State University                       | 46. Malone College (OPAL)                       |
| 19. College of Mount Saint Joseph                    | 47. Marietta College                            |
| 20. College of Wooster (CONSORT)                     | 48. Marion Technical College                    |
| 21. Columbus College of Art and Design (OPAL)        | 49. Mercy College                               |
| 22. Columbus State Community College                 | 50. Methodist Theological School in Ohio (OPAL) |
| 23. Cuyahoga Community College                       | 51. Miami University                            |
| 24. Defiance College (OPAL)                          | 52. Miami University - Hamilton                 |
| 25. Denison University (CONSORT)                     | 53. Miami University - Middletown               |
| 26. Edison Community College                         | 54. Mount Carmel College of Nursing (OPAL)      |
| 27. Franciscan University of Steubenville (OPAL)     | 55. Mount Union College (OPAL)                  |
| 28. Franklin University                              | 56. Mount Vernon Nazarene University            |
|  | 57. Muskingum College (OPAL)                    |

## Ohio Resource Sharing RFP

12/12/2008

58. Myers University
59. North Central State College
60. Northeastern Ohio Universities College of Medicine
61. Northwest State Community College
62. Notre Dame College
63. Oberlin College
64. Ohio Dominican University
65. Ohio Northern University
66. Ohio State University
67. Ohio State University - Agricultural Technical Institute
68. Ohio State University - Lima
69. Ohio State University - Mansfield
70. Ohio State University - Marion
71. Ohio State University - Newark
72. Ohio State University - OARDC
73. Ohio University
74. Ohio University - Chillicothe
75. Ohio University - Eastern
76. Ohio University - Lancaster
77. Ohio University - Southern
78. Ohio University - Zanesville
79. Ohio Wesleyan University (CONSORT)
80. Otterbein College (OPAL)
81. Owens Community College
82. Pontifical College Josephinum (OPAL)
83. Rhodes State College
84. Rio Grande Community College
85. Shawnee State University
86. Sinclair Community College
87. Southern State Community College
88. Stark State College of Technology
89. State Library of Ohio
90. Terra Community College
91. Tiffin University (OPAL)
92. Trinity Lutheran Seminary (OPAL)
93. University of Akron
94. University of Akron - Wayne College
95. University of Cincinnati
96. University of Cincinnati - Clermont College
97. University of Cincinnati - Raymond Walters College
98. University of Dayton
99. University of Findlay (OPAL)
100. University of Toledo
101. Urbana University (OPAL)
102. Ursuline College
103. Walsh University (OPAL)
104. Washington State Community College
105. Wilberforce University (OPAL)
106. Wilmington College (OPAL)
107. Wittenberg University
108. Wright State University
109. Wright State University - Lake Campus
110. Xavier University
111. Youngstown State University
112. Zane State College

## Portage Library Consortium

<http://webpac.portagecounty.lib.oh.us/>

Integrated Library System: Innovative Interfaces, Inc., Millennium, 2006 1.3

Members:

1. Kent Free Library (SearchOhio)
2. Portage County District Library (SearchOhio)
3. Reed Memorial Library (SearchOhio)

## Preble County District Library System

Integrated Library System: SirsiDynix Unicorn

Members:

1. Preble County District Library
2. Marion Lawrence Memorial Library
3. Eaton Schools
4. National Trail Schools
5. Preble Shawnee Schools
6. Tri-County North Schools
7. Twin Valley Schools

## SearchOhio

[http://www.iii.com/news/pr\\_display.php?id=396](http://www.iii.com/news/pr_display.php?id=396)

Search Ohio is a consortium of Ohio public libraries sharing over nine million items.

Integrated Library System: Innovative Interfaces, Inc. INN-Reach 2006

Members:

1. Akron-Summit County Public Library
2. Cuyahoga County Public Library
3. Cuyahoga Falls Public Library
4. Greene County Public Library
5. Kent Free Public Library
6. Louisville Public Library
7. Mansfield/Richland County Public Library
8. Massillon Public Library
9. Mentor Public Library
10. Portage County District Library

- |  |   |
|--|---|
| 11. Reed Memorial Library              | 15. Wadsworth Public Library                  |
| 12. Rodman Public Library              | 16. Warren-Trumbull County Public Library     |
| 13. Stark County District Library      | 17. Westerville Public Library                |
| 14. Toledo-Lucas County Public Library | 18. Youngstown-Mahoning County Public Library |

**SEO**

<http://seoweb.seo.lib.oh.us/>

The SEO Library Consortium is a branch of the State Library of Ohio and serves 72 public library systems at 156 locations, sharing over 6 million items.

Integrated Library System: SirsiDynix Horizon 7.3.4

Members:

- |  |   |
|--|---|
| 1. Ada Public Library                                | 46. Newcomerstown Public Library                        |
| 2. Adams County Public Library                       | 47. Normal Memorial Library                             |
| 3. Alger Public Library                              | 48. North Baltimore Public Library                      |
| 4. Barnesville Hutton Memorial Library               | 49. Oak Harbor Public Library                           |
| 5. Bellair Public Library                            | 50. Pemberville Public Library                          |
| 6. Bliss Memorial Public Library                     | 51. Perry County District Library                       |
| 7. Bowerston Public Library                          | 52. Public Library Of Steubenville and Jefferson County |
| 8. Brown County Public Library                       | 53. Puskarich Public Library                            |
| 9. Caldwell Public Library                           | 54. Ridgemont Public Library                            |
| 10. Canal Fulton Public Library                      | 55. Rockford Carnegie Library                           |
| 11. Carnegie Public Library – Washington Court House | 56. Rossford Public Library                             |
| 12. Carroll County District Library                  | 57. Seneca East Public Library                          |
| 13. Chatfield College Library                        | 58. SEO Library Center                                  |
| 14. Claymont School District Public Library          | 59. St Clairsville Public Library                       |
| 15. Corrections Comm Of Northwest Ohio               | 60. St Marys Community Library                          |
| 16. Coshocton Public Library                         | 61. Tipp City Public Library                            |
| 17. Dally Memorial Library                           | 62. Tuscarawas County Public Library                    |
| 18. Defiance Public Library                          | 63. Union Township Public Library                       |
| 19. Patrick Henry School District Public Libraries   | 64. Upper Sandusky Community Library                    |
| 20. Dorcas Carey Public Library                      | 65. Washington County Public Library                    |
| 21. Findlay-Hancock County Public Library            | 66. Wauseon Public Library                              |
| 22. Forest Jackson Public Library                    | 67. Way Public Library                                  |
| 23. Ft Recovery Public Library                       | 68. Wayne Public Library                                |
| 24. Guernsey County District Library                 | 69. Weston Public Library                               |
| 25. Hardin-Northern Public Library                   | 70. Willard Memorial Library                            |
| 26. Harris-Elmore Public Library                     | 71. Williams County Public Library                      |
| 27. Highland County District Public Library          | 72. Wood County District Public Library                 |
| 28. Holgate Community Library                        |   |
| 29. Holmes County District Public Library            |   |
| 30. Ida Rupp Public Library                          |   |
| 31. Kate Love Simpson-Morgan County Library          |   |
| 32. Liberty Center Public Library                    |   |
| 33. Loudonville Public Library                       |   |
| 34. Martins Ferry Public Library                     |   |
| 35. Mercer County District Library                   |   |
| 36. Milton Union Public Library                      |   |
| 37. Minerva Public Library                           |   |
| 38. Mohwak Community Library                         |   |
| 39. Monroe County District Library                   |   |
| 40. Monroeville Public Library                       |   |
| 41. Montpelier Public Library                        |   |
| 42. Mt Sterling Public Library                       |   |
| 43. New Carlisle Public Library                      |   |
| 44. New London Public Library                        |   |
| 45. New Madison Public Library                       |   |

**Stark Libraries Information Consortium (SLIC)**

<http://search.starklibrary.org/>

Integrated Library System: Innovative Interfaces, Inc. Millennium

Members:

1. Louisville Public Library (SearchOhio)
2. Massillon Public Library (SearchOhio)
3. Stark County District Library (SearchOhio)

**Trumbull Independent Public Libraries (TIPL)**

<http://catalog.beyond-books.org/default.htm>

Integrated Library System: The Library Corporation, Library.Solution 3.3.5

Members:

1. Bristol Public Library
2. Girard Free Library
3. Hubbard Public Library
4. Kinsman Free Public Library
5. McKinley Memorial Library
6. Newton Falls Public Library

## Appendix C VENDOR IDENTIFICATION SHEET

Label A

LEGAL NAME OF THE COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

NAME OF THE COMPANY REPRESENTATIVE: \_\_\_\_\_

TITLE OF THE COMPANY REPRESENTATIVE: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_

FAX NUMBER: \_\_\_\_\_

EMAIL Contact: \_\_\_\_\_

The completed RFP responses must have the following seven sections clearly marked and organized according to the instructions in Section 2.0.

Please indicate by your signature that the following have been submitted with this response.

- A. Vendor Identification Sheet (Labeled A; see Section 2.1.1 and Appendix C)
- B. Table of Contents (Labeled B; see Section 2.1.2)
- C. Cover Letter (Labeled C; see Section 2.1.2)
- D. Vendor Information (Labeled D; see Section 2.1.4)
- E. Customer References (Labeled E; see Section 2.1.5)
- F. Vendor Response and Descriptive Answers (Labeled F see Section 2.1.6 and Appendix D)
- G. Cost Sheet (Labeled G; see Section 2.1.7 and Appendix E)

I certify that all of the above items have been submitted with this RFP response.

SIGNED: \_\_\_\_\_

Name & Title: \_\_\_\_\_

Date: \_\_\_\_\_

## **Appendix D**

### **Sample Vendor Response Sheet**

These Response Forms (or responses similarly formatted) must be used to respond to the RFP. Any written clarifications and all Written Answer Required responses must be attached at the end of these Vendor Response Forms (or incorporated in them), numbered to correspond to the specifications, and presented in numerical order. Instructions for completing the forms are included immediately before 3.0.

- 3.1 WRITTEN ANSWER REQUIRED
- 3.2 WRITTEN ANSWER REQUIRED
- 3.3 WRITTEN ANSWER REQUIRED
- 3.4 WRITTEN ANSWER REQUIRED
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- 3.9.1 WRITTEN ANSWER REQUIRED
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- 3.10.1 WRITTEN ANSWER REQUIRED
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## Appendix E Cost Sheet

### LABEL G

Please provide a detailed and complete listing of all costs for the Product as proposed in the response to the specifications included in 3.0 through 9.0.

In preparing this cost proposal, the following points must be addressed

- (1) Costs for each of the following functional components:
  1. Authentication (3.0)
  2. Patron Interface (4.0)
  3. Library Functions (5.0)

Note: These costs do not have to be provided separately. If appropriate, the cost of the proposed software product can be listed, provided it includes the three components listed above. However, if you are willing to contract with the State Library of Ohio for only a portion of your product (e.g., authentication only), you must include separate costs for each component.

- (2) Costs for required hardware and/or facilities, if applicable. Include annual maintenance costs. Separate one-time and on-going costs. Include here all costs associated with purchasing and installing your system as proposed in this response. Indicate

- (3) Costs for each of the following support components:
  1. Management and Support (7.0)
  2. Training and Documentation (8.0)
  3. Plans for Development (including upgrades & enhancements) (9.0)

Vendors are strongly encouraged to explain how the cost figures were derived or calculated (e.g., by number of potential users, by size of libraries, etc.).