



RICHLANDLIBRARY.COM

Advertisement for
Customer Engagement Tool & Website Redesign
Request for Proposals

Richland Library is requesting proposals for the development and implementation of both a customer engagement tool and a new RichlandLibrary.com website. When development is completed our 2-person internal development team should be able to continue future agile development as outlined in the following Request for Proposal (RFP) (please see Part III).

The chosen vendor(s) will work alongside an internal Richland Library team to launch the new website and the stand-alone customer engagement tool to help both staff and customers easily discover and access library resources with an intuitive and beautiful experience. We're looking to build not just a "great library website" but a great online experience that is informed by both design and build influences from outside the library world.

It should be noted that a portion of the discovery phase of this project is being undertaken by an internal library team which involves several different layers including capturing data from analytics, card sorts, data modeling exercises, and usability studies. This internal team is also building a product backlog with a list of user stories (customer, staff, and even developer-oriented) based on priority from the results of the discovery (please see Part V for full details).

An open and exposed line of communication and involvement is expected and required between the Richland Library Project Management Team and the selected vendor.

Proposal documents may be obtained from the Finance Office, 1431 Assembly Street, Columbia, SC, 29201 from 10:00am – 5:00pm by emailing financeoffice@richlandlibrary.com, or by visiting www.Richlandlibrary.com.

Sealed proposals must be received on or before 12:00 pm on **Tuesday, May 23, 2017**. Proposals received after the stated time will not be accepted. Proposals must be in a sealed envelope clearly marked "**Customer Engagement Tool & Website Redesign.**"

The Richland Library is an affirmative action and equal opportunity agency.



DATE: April 24, 2017

REQUEST FOR PROPOSALS: Customer Engagement Tool & Website Redesign

OPENING DATE AND TIME: May 23, 2017 at 12:00 noon

Interested parties are invited to submit sealed proposals in accordance with the requirements of the Solicitation contained herein.

Sealed proposals must be submitted to the Main Library Finance Office, 1431 Assembly Street, no later than 12:00 noon, May 23, 2017. Proposals will be opened in the Learning Engagement Classroom located on the Third Level at 1431 Assembly Street, at which time respondents to this request will be publicly identified. Proposals received after the stated time will not be accepted. Proposal modifications will not be accepted by facsimile prior to opening. Due to the possibility of negotiations with any offeror that may be eligible for contract award, prices will not be divulged at time of opening.

A proposal **must** be signed by an official authorized to bind the offeror and must contain a statement to the effect that the proposal price is firm for a period of ninety days beginning May 23, 2017.

Sealed proposals must be marked "**Customer Engagement Tool & Website Redesign.**"

This Solicitation does not commit Richland Library to award a contract, to pay any costs incurred in the preparation of proposals, or to procure or contract for the services solicited. The Library has the right to reject any or all proposals, to waive any minor irregularities, to cancel in part or whole this Solicitation if it is in the best interests of the Library, and to award a contract that will be most advantageous for the Library.

Richland Library is an affirmative action and equal opportunity agency.

KEY EVENT DATES

PROPOSAL

1. Advertised in SCBO and RL Website April 24, 2017
2. Issuance of Request for Proposals April 24, 2017
3. Deadline for Questions May 15, 2017
4. Opening Date/Deadline for RFPs On or before May 23, 2017 at 12:00 noon

Send Questions To: Richland Library
Main Library Finance Office
1431 Assembly Street
Columbia, SC 29201-3101
E-mail: financeoffice@richlandlibrary.com

**Mail Proposals To: Richland Library
Attention: Procurement
Main Library Finance Office
1431 Assembly Street
Columbia, SC 29201-3101

Hand-Carry Proposals To: Richland Library
Main Library Finance Office
1431 Assembly Street
Columbia, SC 29201-3101

Mark Envelopes: **"Customer Engagement Tool & Website Redesign"**

**Offerors mailing proposals should allow a sufficient mail delivery period to insure timely receipt of their proposals by the Library.

PART I. REQUEST FOR PROPOSALS

A. GENERAL INFORMATION AND CONDITIONS

1. **Purpose:** This Request for Proposals is issued so that the Library may receive proposals from parties interested in developing a Customer Engagement Tool and a new Richland Library Website. The library invites all interested and qualified vendors to submit a sealed, written proposal for the services described in the Scope of Services.
2. **Issuing Office:** This RFP is issued for Richland Library, 1431 Assembly Street, Columbia, SC 29201, by the Library Finance Office. This issuing office is the sole point of contact for this RFP.
3. **Nature of Service:** The Library anticipates, but does not guarantee, that the Nature of Services will remain as outlined in Part III. Negotiations may be required with the successful vendor if the requested services are altered.
4. **Outside Discussions Prohibited:** By submission of a response to the Request for Proposals, a vendor agrees that during the period following issuance of Request and prior to an award, vendor shall not discuss this procurement with other vendors or any outside party except staff officials of Richland Library.
5. **Offeror Responsibility:** Each offeror shall fully acquaint itself with conditions and restrictions attending the performance of the contract solicited. Offerors shall state a price that includes all costs reasonably expected to be incurred by the Library if proposal accepted. Offerors are fully responsible for any costs of proposal submissions.
6. **Proposal Constitutes Offer:** By submitting a proposal, the offeror agrees to be bound by all the terms and conditions set forth in this document. A proposal containing variations from the terms and conditions set forth herein may, in the sole discretion of the Library, be declared not responsive. The requirements and conditions set forth in this document will become part of the successful offeror's contractual obligations upon award of the contract.
7. **Approval of Board of Trustees:** Award of this contract shall not become effective unless and until approved by the Board of Trustees of Richland Library.

8. Preparation of Proposals: All proposals should be complete and clearly and carefully worded. Proposals must convey all the information requested by the Library. The use of advertising and promotional material is not desired. If a proposal contains less than the required information or if the proposal fails to conform to the essential requirements of the Request for Proposals, the Library, in its sole discretion, may declare the proposal, in whole or part, not responsive.

Offeror is required to submit three (3) paper copies and one (1) electronic copy of the proposal (Flash drive, CD, or DVD).

9. Inspection of Proposals/Confidential Information: Proposals shall be open for public inspection after contract award except that proprietary or confidential information in any proposal that is clearly marked "confidential" by the offering vendor shall not be disclosed without the written consent of the offering vendor.

10. Questions: Every effort has been made to insure that all information needed by offerors is included herein. If an offeror finds that he cannot complete a proposal without additional information, he must submit written questions to the office designated in the Key Event Dates section. No questions will be accepted by the Library after the stated deadline. All questions and replies will be in writing and distributed to all offerors.

11. Proposals signed: All proposals must be signed by a representative of the company authorized to commit to the provisions of the proposal (Part II). Unsigned proposals will be rejected unless an authorized representative is present at the proposal opening and provides the needed signature.

12. Offeror Qualifications: In addition to the information required by this Request for Proposals, the apparent successful offeror must, upon request of the Library, furnish any and all information requested by the Library to determine offeror's ability to perform the contract.

13. Clarifications: The Library reserves the right, at any time after opening and prior to award, to request from any offeror clarification regarding information contained in the offeror's proposal.

14. Negotiations: In accordance with its Procurement Procedures, the Library may negotiate with offerors regarding the evaluation criteria contained in the Request for Proposals. All apparently eligible offerors will be accorded an opportunity to submit best and final proposals if negotiations with any other offeror has resulted in a material alteration to the RFP and such alteration has resulted in a cost consequence which may affect the order of ranking to the proposals. In conducting negotiations, no information derived from competing proposals will be disclosed.

15. Award: Award will be made to the responsive offeror(s) whose proposal(s) is/are determined to be the most advantageous to the Library, its employees, its users, and the taxpayers of Richland County. The evaluation factors are set forth herein. Factors are included in Part I(C). Only the factors listed will be used to evaluate proposals. The Library reserves the right to reject any or all proposals, in whole or part, to waive any minor irregularities, and to cancel in part or whole this solicitation if it is in the best interest of the Library.

16. Indemnification: Contractor agrees to hold the Library, its employees, officers and agents harmless from liability from any claims, damages, and actions of any nature arising from the use of any materials furnished or services performed by the contractor, provided that such liability is not attributable to negligence on the part of the Library, its officers, employees or agents.

17. Contractor Responsibility: The contractor alone will be held solely responsible for the performance of any and all obligations under the contract resulting from its proposal.

18. Nondiscrimination: Contractor agrees that, during the performance of all obligations under its contract with the Library, the contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex or national origin; that it will take affirmative action to insure that applicants are employed and employees are treated fairly during employment without regard to race, color, religion, sex, national origin; that all solicitations or advertisements for employees placed by or on behalf of the contractor shall state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex or national origin.

19. Right to Protest: Contractors who have submitted a response to a Request for Proposals and believe that award has been improperly made may protest such award by submitting a protest, in writing, to the Procurement Coordinator, Richland Library, 1431 Assembly Street, Columbia, SC 29201-3101, within ten (10) days after the award or intent to award notice.

B. PROPOSAL REQUIREMENTS

Offeror must respond fully to each requirement stated below and indicate its compliance and understanding:

1. Offeror should state its understanding of the purpose described in this Request for Proposals.
2. Offeror must agree in its proposal that if it is the successful contractor, it will indemnify and hold the Library harmless for claims and damages as required in this Request for Proposals, Part I, A, 16.
3. The offeror must state in its proposal three other business references where offeror has, within the past three years, supplied services including User Experience, Web Development, Application Development and Design projects similar to the one outlined within this solicitation. The offeror must also summarize in its proposal its work history and experience in performing contracts similar to the one solicited herein.
4. Offeror must state in its proposal the complete name of its company, its address, and its principal place of business. Indicate whether the business is operated by an individual, partnership, or corporation. If applicable, offeror must state in its proposal the name of any subordinate entity that will be performing all or a portion of the service.
5. Offeror must complete and sign the Certification of Cost.
6. Offeror must sign and have notarized the attached Affidavit of Noncollusion.
7. Offeror must sign and have notarized the attached Affidavit of Nondiscrimination.
8. Offeror must sign and complete the Cost Form.
9. Offeror must sign the attached Certification of Timely Delivery.
10. Offeror must sign the Minority Participation Form.
11. Offeror must state in its proposal that it agrees to bill the Library (invoice to include PO numbers) for services rendered:

Richland Library, Finance Office, 1431 Assembly Street, Columbia, SC 29201-3101.

C. EVALUATION CRITERIA

Proposals will be reviewed to determine compliance with all of the requirements of the Request for Proposals. Any proposal failing to meet all essential requirements of the RFP may be rejected.

Each proposal that meets all of the essential requirements of the RFP will be evaluated based on the criteria listed below in relative order of importance.

1. Similar experience, work history, and past performance.
2. Ability to satisfy specification requirements.
3. The proposed plan of performance, understanding of required services, compliance with general conditions.
4. Cost.

PART II. ATTACHMENTS

ATTACHMENT A

CERTIFICATION OF COST

The following certification must be submitted with the offer in the cost section:

I hereby certify that the price included in this proposal is accurate and binding for ninety days, beginning from the proposal due date and that all charges and estimates are, to the best of my knowledge, accurate and complete.

OFFEROR

Firm Name

Signature

F.E.I.N. _____

OR

SOCIAL SECURITY NO. _____

Failure to furnish your F.E.I.N. or Social Security Number will result in the delay of contract.

ATTACHMENT B

AFFIDAVIT OF NONCOLLUSION

INSTRUCTIONS: Each offeror submitting a proposal must complete this Affidavit of Noncollusion. This sworn statement will be considered part of the offeror's proposal.

PROJECT NAME: Richland Library
"Customer Engagement Tool & Website Redesign"

SOLICITATION DOCUMENTS DATED: April 24, 2017

OPENING DATE: On or before May 23, 2017

STATE OF

COUNTY OF

Personally appeared before me _____, who being duly sworn, says that he is a member of the firm of _____, and that his firm, association, or corporation, has not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in connection with the submission of a proposal on the above-named project.

OFFEROR

Firm Name

Signature

SWORN and subscribed to before me
this ____ day of _____, 20__

(L.S.)

Notary Public for
My commission expires:

ATTACHMENT C

AFFIDAVIT OF NONDISCRIMINATION

Offeror certifies that, during the performance of all obligations under its contract with the Library, the offeror will not discriminate against any employee or applicant for employment because of race, color, religion, sex or national origin; that it will take affirmative action to insure that applicants are employed and employees are treated during employment without regard to race, color, religion, sex, national origin; that all solicitations or advertisements for employees placed by or on behalf of the offeror shall state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex or national origin.

Offeror

SWORN and subscribed to before me
this ___ day of _____, 20__

_____(L.S.)
Notary Public for
My commission expires:

ATTACHMENT D

COST FORM

_____ (Offeror's Name) agrees to perform the services as outlined in this Request for Proposals for the following cost:

Customer Engagement Tool & Website Redesign \$ _____

The cost above does _____ does not _____ include South Carolina Sales Tax. **If South Carolina Sales/Use Tax is charged, it must also be itemized on all invoices.**

Offeror's / Authorized Signature

Date

ATTACHMENT E

CERTIFICATION OF TIMELY DELIVERY

_____ (Offeror's Name) agrees to deliver both the Customer Engagement Tool (herein referred to as "InterCEPT) and a new RichlandLibrary.com website as outlined in this Request for Proposals within 30 calendar days of issuance and delivery of the final Purchase Order from Richland Library.

Offeror's / Authorized Signature

Date

ATTACHMENT F

MINORITY PARTICIPATION FORM

Greater participation of minority businesses in contracts with the Richland Library for construction, materials, commodities, equipment and rendering of services shall be encourage.

Is the bidder a South Carolina Certified Minority Business? 0 Yes 0 No

Is the bidder a Minority Business certified by another governmental entity? 0 Yes 0 No

If so, please list the certifying governmental entity: _____

Will any of the work under this contract be performed by a SC certified Minority Business as a subcontractor? 0 Yes 0 No

If so, what percentage of the total value of the contract will be performed by a SC certified Minority Business as a subcontractor? _____

Will any of the work under this contract be performed by a minority business certified by another governmental entity as a subcontractor? 0 Yes 0 No

If so, what percentage of the total value of the contract will be performed by a minority business certified by another governmental entity as a subcontractor? _____

If a certified Minority Business is participating in this contract, please indicate all categories for which the Business is certified:

- Traditional minority
- Traditional minority, but female
- Women (Caucasian females)
- Hispanic minorities
- DOT referral (Traditional minority)
- DOT referral (Caucasian female)
- Temporary certification
- SBA 8 (a) certification referral
- Other minorities (Native American, Asian, etc.)

(If more than one minority contractor will be utilized in the performance of this contract, please provide the information above for each minority business.)

PART III. SCOPE OF SERVICES

Customer Engagement Tool & Website Redesign

This project includes two equally important initiatives:

1. The development and delivery of a stand-alone, open-source, customer engagement tool (InterCEPT).
2. The development and delivery of a new website for Richland Library.

If the chosen vendor is unable to manage the delivery of both initiatives concurrently, the customer engagement tool initiative will take precedence in terms of scheduling and development. Vendors should also plan to track development time spent on InterCEPT separately from hours spent on website redesign work.

Once developed, the InterCEPT product will be made available to the larger library community.

Vendor(s) must be willing and ready to work with an internal Richland Library team that is helping to guide and test the development work as it's being completed. An open and exposed line of communication and involvement is expected and required between the Richland Library project managers and the selected vendor. Our goal is to work together to implement intuitive and delightful tools that help library customers use our services.

INITIATIVE #1: CUSTOMER ENGAGEMENT TOOL (INTERCEPT)

InterCEPT will have the following Objectives:

- Develop an open-source application (or multiple applications) that includes:
 - a customer participation/engagement tracking component
 - a calendaring system
 - a room/equipment reservation component
 - the ability to seamlessly connect with a library's ILS (Integrated Library System), the software that manages a customer's library account.
- Pilot the new (InterCEPT) tool at Richland Library and other partner library systems.

InterCEPT will have the following Outcomes:

- To improve library event programming so that it meets the needs of the community.
- To better understand the outcome, reach and efficacy of library learning opportunities on attendees.

InterCEPT will have the following Scope of Services:

- Functionality for Customers & Staff:
 - Method to track individual customer attendance and tie it bac to the ILS
 - Room & equipment reservation
 - Calendar views
 - Event searching
- Staff functionality:
 - The ability to be integrated with the most popular integrated library systems (ILS) amongst public libraries
 - Customer program attendance, retrievable and exportable, displayed alongside customer information
 - Ability to create an event posting that includes information for related catalog items
- Developer functionality:
 - Code should be made available in an open-source format that will allow free download, usage, and modifications by other unaffiliated libraries
 - Ability to connect with the data source through an API or other method that allows pushing and pulling of all major data points

INITIATIVE #2: RICHLAND LIBRARY WEB REDESIGN AND LAUNCH

The Outcomes of the Redesigned Richland Library Website Include:

Crafting an online customer experience that is:

- Attractive
- Intuitive
- Clean
- Simple
- Consistent

The Scope of Services Needed for The Website Initiative Include:

- Assistance with user experience testing to include:
 - User experience validation
 - User stories
 - Lo-Fi testable prototypes

- A mobile-friendly redesign of RichlandLibrary.com that supports all the functionality currently on the site. Some examples include:
 - Search that leverages our Polaris ILS as well as library website content
 - A content management system with blog content contributed by staff
 - Template-based theming capability
 - Easily navigating to catalog (catalog.richlandlibrary.com) from the website
 - Easily navigating to our third-party vendors
 - Easily displaying advertising materials & information for library programs including video
 - “My Account” functionality that ties into the Library’s ILS (integrated library system) to allow viewing fines, checkouts, renewing of items, and placing of holds
 - Online customer registration and re-printing of library cards
 - Library location listings with hours, Google maps, and Google 360 virtual tours
 - Listings and promotion of library events
 - Blogs for departments that allow them to promote library events and link directly to recommended catalog resources
 - Ability to continue website hosting from our existing Blackmesh environment
 - Code releases, enhancements, and development must be maintainable by the Marketing & Digital Strategy team in a version control system such as Git after initial development by the vendor(s)
 - Workflow to allow customers to request that the library purchase an item if it is not available in the catalog

- Current API integrations that should carry over from the current site into the updated site:
 - FAQs – LibAnswers - <https://www.springshare.com/libanswers/> - <http://help.springshare.com/content.php?pid=231605&sid=3095439>
Most API documentation hidden behind login.
 - Catalog – Polaris ILS from Innovative - <https://iii.com/products/polaris> - API documentation hidden behind login at <http://developer.polarislibrary.com/>.
 - Flickr – Used to show photo galleries on a few blog posts.
 - SmartPay – <http://comprisetechologies.com/online-payment-management/> - Allows customers to pay fines, request obituaries, and pay for out-of-county library cards online on this separate site/payment gateway.
 - SmartyStreets - <https://smartystreets.com/> - Free service used to determine during online library card registration if the customer is within Richland County.

- Migration of existing website content

PART IV. Planned Timeline

The following is a general timeline.

Vendor Hired – 2nd Quarter 2017

Discovery and Development Begins – 3rd Quarter 2017

Beta Products Delivered to Beta Test Groups – 2nd Quarter 2018

Final Products Delivered – 3rd Quarter 2018

PART V. Available Resources

The following resources are provided as links in order to give potential vendors further information about Richland Library and the Marketing & Digital Strategy Team.

- BuildingYourLibrary.com – Built by the Marketing & Digital Strategy Team in 2015, this site details many renovations currently in progress at different Richland Library locations.
- Recently produced designs by Marketing & Digital Strategy in print materials: <https://issuu.com/richlandlibrary>
- Strategic Plan: <http://www.richlandlibrary.com/about/strategic-plan>
- Annual Report 2016: <http://accessfreely.com/annualreport/>
- Customer Cluster Overview: <https://drive.google.com/open?id=0B7Vh8yP9BHF0aE5maldHTUZxNk0>
- Current Product Backlog (living document): <https://github.com/RCPL/v3/issues>
- Drupal 7 modules currently in use: <https://docs.google.com/spreadsheets/d/1KngPibW2vBnPX8muV5Qv7ORYxSiDGIVSxDXmab9GbGQ/edit?usp=sharing>

PART VI. Terms and Conditions

Richland Library reserves the right to reject any and all proposals, and to waive minor irregularities in any proposal.

The Richland Library reserves the right to request clarification of information submitted, and to request additional information on any proposal.

Richland Library shall not be responsible for any costs incurred by the agency in preparing, submitting or presenting its response to the RFP.

Any payment for services will be made on a schedule mutually agreed upon by the agency and the Library.

PART VII. Evaluation Process

Proposals will be evaluated by a committee of Richland Library staff. Evaluations will be based on criteria outlined herein which may be weighted by the Library in a manner it deems appropriate. All proposals will be evaluated using the same criteria. The criteria used will be:

Responsiveness to the RFP: The Richland Library will consider all the material submitted to determine whether the agency's offering is in compliance with the RFP documents.

Ability to Perform Required Services: The Richland Library will consider all the relevant material submitted by each agency, and other relevant material it may otherwise obtain, to determine whether the agency or organization is capable of providing services of the type and scope specific to the RFP. The following elements may be given consideration by the Library in determining whether an agency is capable:

1. The ability and capacity of the agency and the skills, experience, and availability of the specific individuals to be assigned to the Library to perform the services required;
2. The quality of performance by the agency on previous and similar work and such other information as may be secured and considered relevant by the Library, including information obtained from references provided;
3. The ability of the agency to present professional and innovative work; the skill of the agency as demonstrated by samples of similar work and/or references from similar organizations.

Interviews and Site Visits: The Library may conduct interviews and site visits as part of the final selection process.