



# ORANGE COUNTY LIBRARY SYSTEM

**REQUEST FOR PROPOSALS  
FOR  
INTEGRATED LIBRARY SYSTEM  
OCLS RFP ILS 26-002  
RFP Project Manager: Lynette Schimpf  
Email: [oclsbids@ocls.org](mailto:oclsbids@ocls.org)  
RFP Issue Date: 04/30/2026  
Proposals Due Date: 06/29/2026**

## **1. PROJECT DESCRIPTION:**

The Orange County Library System (LIBRARY) is soliciting sealed written proposals from prospective VENDORS (VENDOR) for an Integrated Library System (ILS). The LIBRARY seeks to replace its Sierra ILS with a flexible, scalable, reliable, and modern ILS from qualified VENDORS who can demonstrate technical and organizational capability, as well as experience and expertise necessary to provide an ILS that will meet the LIBRARY'S current and future operational needs. This implementation will include configuration to meet the LIBRARY'S operational requirements, migration of current and historical data, guidance on best practices with the ILS, training, and ongoing maintenance and support.

The ILS will be the system of record for the LIBRARY'S physical media holdings data, for patron data used for circulation transactions, patron authentication, and for LIBRARY business processes such as sending circulation notifications and other communications.

Through this procurement, the LIBRARY aims to implement an ILS that enhances operational efficiency, improves patron experience, and positions the LIBRARY to enrich lives through experiences and opportunities to learn, grow, and connect.

## **2. BACKGROUND:**

The LIBRARY is an independent special taxing district of the State of Florida. It is governed by an appointed five-member Board of Trustees. The LIBRARY, which celebrated its 100-year anniversary in 2023, now serves a community of over 1.4 million people with fifteen physical locations in Orange County, Florida, one of the fastest growing counties in the nation. The LIBRARY is in the process of opening two additional locations within the next ten months. The LIBRARY currently employs 497 staff members. The LIBRARY has a robust Community Engagement department checking out materials at frequent community-sponsored, offsite events. Two book bikes are in use by Community Engagement, and a bookmobile is scheduled to be delivered soon. The LIBRARY'S Home Delivery department, located in the Orlando Public Library, delivers well over 400,000 items to resident patrons' homes across the county every year. The LIBRARY currently has four standalone book drops located across the county. In the last fiscal year, the LIBRARY had over 1.8 million visits to its locations, circulated more than 3.7 million physical items, and had 4 million digital checkouts. The LIBRARY holds approximately 1.2 million items.

The community is among the most ethnically diverse in the nation. According to the 2022 U.S. Census population estimates data, 38.8% of the population is white (not Hispanic or Latino), 22.9% is African American, 33.1% is Hispanic, and 5.8% is Asian. DataUSA reports that the median household income is \$61,416 and 14.2% of the population is living in poverty.

The LIBRARY migrated its ILS from DRA to Innovative Interfaces Millennium in 2004 then to Sierra in 2012. The ILS was a local, turn-key system until 2019 when the LIBRARY moved to a fully self-hosted system. The LIBRARY has a centralized workflow for ordering, cataloging, and processing materials for all locations' individual collections. The LIBRARY has 27

Bibliotheca self-check machines connecting to the ILS over SIP2. The LIBRARY uses iTiva for telephone renewal, which integrates via SIP2. The LIBRARY currently uses the Sierra Patron API for some ebook and other electronic resource authentication and uses EZproxy for authentication of the majority of its other online databases. The LIBRARY has created a custom online patron registration form that uses the Sierra REST API. The LIBRARY provides PC reservation and printing services from TBS, which both currently use the Sierra Patron API. The LIBRARY manages event and room registration using software from Communico, which integrates via the Sierra REST API and was implemented in 2018. The LIBRARY implemented the Communico Connect mobile app in 2025, which integrates via the Sierra REST API. The LIBRARY implemented Aspen Discovery in February 2026, which integrates via the Sierra REST API.

More information on the LIBRARY can be found in the [Annual Report 2024-2025](#).

### 3. **SCOPE OF SERVICES:**

The LIBRARY seeks a VENDOR that will be responsible for the following services:

#### I. **Integrated Library System Software**

The ILS project will deliver next-generation library enterprise resource management software that will provide required functionality equivalent to that provided by the LIBRARY's current ILS and will improve the LIBRARY's operational efficiency, as measured by improved patron service experiences. The ILS will scale to the LIBRARY's size and transaction volume, and it will be flexible enough to adapt to a rapidly changing information environment.

The following chart describes the ILS's functional requirements, and a comprehensive list of the ILS's functional requirements is listed in **Appendix A**.

Domain	Module	Business Process
Access Services	Circulation	<ul style="list-style-type: none"> <li>• Checkin</li> <li>• Checkout</li> <li>• Claims returned</li> <li>• Collection Management</li> <li>• Fines &amp; Fees</li> <li>• Item Records</li> <li>• On the fly</li> <li>• Patron records</li> <li>• Printing</li> <li>• Renewals</li> <li>• Searching</li> </ul>
	General	<ul style="list-style-type: none"> <li>• Patron records</li> <li>• Global editing</li> </ul>
	Holds	<ul style="list-style-type: none"> <li>• Checkin</li> <li>• Checkout</li> <li>• Fines &amp; Fees</li> <li>• Fulfillment</li> <li>• Home Delivery</li> <li>• Item Records</li> <li>• Modifying</li> <li>• Paging</li> <li>• Patron records</li> <li>• Printing</li> <li>• Reporting</li> <li>• Requesting</li> <li>• Rules</li> </ul>
	Notices	<ul style="list-style-type: none"> <li>• Administration</li> <li>• Formatting</li> <li>• Patron records</li> </ul>
Technical Services	Acquisitions	<ul style="list-style-type: none"> <li>• Claims</li> <li>• Collection Management</li> <li>• Fiscal Close</li> <li>• Funds &amp; Budget</li> <li>• General</li> <li>• Holds</li> </ul>

		<ul style="list-style-type: none"> <li>• Invoicing</li> <li>• Item Records</li> <li>• Ordering</li> <li>• Receiving</li> <li>• Reporting</li> <li>• Searching</li> <li>• Vendors</li> </ul>
	Cataloging	<ul style="list-style-type: none"> <li>• Authority Records</li> <li>• Bibliographic Records</li> <li>• General</li> <li>• Item Records</li> <li>• Reporting</li> <li>• Searching</li> </ul>
	Global editing	<ul style="list-style-type: none"> <li>• Bibliographic Records</li> <li>• General</li> <li>• Item Records</li> <li>• Order Records</li> </ul>
	Serials	<ul style="list-style-type: none"> <li>• Check-In</li> <li>• Claims</li> <li>• General</li> <li>• Holds</li> <li>• Issue Records</li> <li>• Predictions</li> <li>• Printing</li> <li>• Receiving</li> <li>• Reporting</li> <li>• Routing</li> <li>• Searching</li> <li>• Serial Records</li> </ul>
System Administration	Client	<ul style="list-style-type: none"> <li>• Administration</li> <li>• Configuration</li> <li>• General</li> <li>• Logins</li> <li>• Permissions</li> </ul>
	Reporting	<ul style="list-style-type: none"> <li>• Exporting</li> <li>• Scheduling</li> <li>• SQL</li> </ul>
	Security	<ul style="list-style-type: none"> <li>• Authentication</li> <li>• Logging</li> </ul>

		<ul style="list-style-type: none"> <li>• Notifications</li> </ul>
Integrations & API	SIP2	<ul style="list-style-type: none"> <li>• Checkout</li> <li>• Security</li> <li>• Circulation</li> <li>• 3<sup>rd</sup> Party Authentication</li> </ul>
	REST	<ul style="list-style-type: none"> <li>• Authority Records</li> <li>• Bibliographic Records</li> <li>• Checkout</li> <li>• Fines &amp; Fees</li> <li>• Funds &amp; Budget</li> <li>• General</li> <li>• Holds</li> <li>• Invoicing</li> <li>• Item Records</li> <li>• Patron records</li> <li>• Security</li> <li>• Configuration</li> <li>• Circulation</li> </ul>

## II. System

- A VENDOR hosted system is strongly preferred provided the following criteria are met:
  - ILS hosted on a single tenant environment
  - High availability
    - Target 99.99% availability at all times. Service outages must be scheduled in advance with agreed-upon timeframes included in the Service Level Agreement (SLA)
    - No degradation of service at peak usage times. Must have the ability to rapidly scale the ILS to handle growth and peak usage, and describe how this will be achieved
    - Redundancy and failover systems are included
  - VENDOR maintains routine back-ups
  - VENDOR provides test/development system(s) with scheduled and on-demand synchronization
- Security
  - Authentication
    - ILS supports SSO through Duo Security via SAML or any other compatible technology

- Compliance
  - VENDOR demonstrates compliance with recognized Information Security standards, such as SOC II (preferred), PCI-DSS Attestation of Compliance (or equivalent data security framework), and ISO 27001 Based Assessment. VENDOR provides a SOC II report if requested by LIBRARY
- Risk management
  - VENDOR provides ongoing system, process, and network monitoring
  - VENDOR has patch and vulnerability management
  - VENDOR maintains cyber liability insurance
  - VENDOR offers Investigation support in case of breach or compromise of data or users
  - VENDOR maintains a Business Continuity Plan
  - VENDOR maintains Incident Response Plan
  - VENDOR maintains a Disaster Recovery Plan
- Data
  - VENDOR demonstrates adherence to data protection requirements (e.g. CIPA)
  - LIBRARY owned data, including backups, must be located, accessed, processed and stored within the United States
  - ILS encrypts Personally Identifiable Information (PII) at rest and in transit
  - VENDOR maintains PII as confidential (i.e., data mining is prohibited)
  - VENDOR provides alerts on security concerns
  - VENDOR provides the retention policy for application and security logs
- Clients
  - Web
    - Secure, responsively designed web-based staff client providing functional parity with the desktop client to enable work on a variety of computers and mobile devices, including outside the network and away from service desks
  - Desktop
    - The Windows-native client application that can be packaged for remote deployment and installation, which has minimal to no dependencies on separately licensed third-party utilities, libraries, and frameworks
  - Mobile
    - Staff client applications for mobile devices to perform work away from service desks

- Architecture
  - Portability
    - System can be moved from VENDOR's cloud hosting provider to another by VENDOR when a cloud hosting provider cannot meet expectations
    - System can be moved to a LIBRARY hosted environment with support from VENDOR
    - SYSTEM can be supported by another VENDOR
  - Openness
    - Provides full documentation of client applications, APIs, RDMS, hardware, operating systems, and network diagrams, etc.
    - Administrative users have access to read full database to create custom queries through standard programming languages (i.e. SQL)
    - Access to user-generated development and queries from ILS user community
    - Source code of ILS is available
- User Experience
  - Comprehensive and data-informed approach to user research and testing prior to implementation of new features or changes
  - Requested features approved by the user community are developed, tested, documented, and included in software updates in a timely manner

### **III. Project Management**

- Documentation on project
  - VENDOR will provide timeline with milestones for configuration, testing, and acceptance
  - VENDOR will coordinate routine meetings as agreed upon with LIBRARY throughout the life of project
  - Clearly defined responsibilities for VENDOR and LIBRARY
- VENDOR will provide synchronous and asynchronous channels for communication and support to coordinate project with LIBRARY
- VENDOR will clearly define escalation channels

### **IV. Configuration**

- VENDOR will coordinate with LIBRARY to configure initial system settings for a simultaneous launch with all modules and business processes fully functional
  - VENDOR will implement configurations to meet LIBRARY workflow requirements
  - VENDOR will configure initial 3rd party integrations

## V. Migration

- LIBRARY will perform data cleanup prior to and during implementation based on VENDOR feedback to ensure VENDOR has best data possible for transformation and loading
- VENDOR will assess data and provide LIBRARY a plan for data migration to the ILS and will provide a report on data errors encountered
- VENDOR will perform data transformation and loading into ILS including all record and transactional data
- VENDOR will provide test migrations as necessary to pass LIBRARY testing and acceptance requirements
- VENDOR will provide a report to the LIBRARY of any failures in data migration and a plan to resolve the issue
- VENDOR will perform migration to new ILS with minimal downtime, less than one (1) day, with the majority of work occurring at a time agreed upon by the LIBRARY and VENDOR. The LIBRARY prefers a timeframe of lowest usage and overnight hours

## VI. Training & Documentation

- VENDOR will supply documentation for all levels of LIBRARY staff users
- VENDOR will provide synchronous and asynchronous training for all levels of LIBRARY staff users
- VENDOR will provide database schema documentation, and definitions will be updated soon after software updates
- VENDOR will provide API documentation for all endpoints and will update documentation for changes and depreciations

## VII. Testing and Acceptance

The LIBRARY will conduct structured testing prior to accepting the ILS and authorizing go-live. Acceptance is contingent on the VENDOR demonstrating that all Must Have requirements in **Appendix A: Requirements** are met and that the LIBRARY's core workflows function as expected in the configured system.

- Testing will occur in two phases: migration testing and pre-launch acceptance testing, both conducted in the VENDOR-provided test/development environment
  - Migration Testing. Following each test migration, the LIBRARY will verify the completeness and integrity of migrated data, including bibliographic records, authority records, item records, serial records, patron records, vendor records, order records, and transactional data (holds, fines, checkouts, budgets, funds). The LIBRARY will compare record counts and check samples for data accuracy against the source system. VENDOR will provide a migration validation report alongside each test migration.
  - Pre-Launch Acceptance Testing. Prior to go-live authorization, the LIBRARY will conduct acceptance testing across the following areas:

- Staff workflows. LIBRARY staff will perform tests covering all major business processes identified in Section I of the Scope, including circulation, holds management, home delivery workflows, acquisitions, cataloging, serials, and notices
  - Integrations with third-party services. The LIBRARY will verify that all integrations identified in the Requirements section are functional
  - REST API endpoints. The LIBRARY will verify that all REST API endpoints documented by the VENDOR respond correctly and return expected data for the LIBRARY's integration use cases
- System performance. The VENDOR will verify that the system performs without degradation under simulated peak load conditions consistent with the LIBRARY's transaction volumes
- Security controls. The LIBRARY will verify that SSO integration is functioning as required
- Acceptance Criteria and Sign-Off
  - The LIBRARY will define pass/fail criteria for each test area prior to the start of acceptance testing. The ILS will be considered accepted when:
    - All Must Have requirements in **Appendix A: Requirements** are demonstrated as functional
    - All third-party integrations listed above are operational
    - No critical defects (defined as defects that prevent a core workflow from functioning) remain unresolved
  - The LIBRARY's designated project lead provides written sign-off
- If critical defects are identified during acceptance testing, the VENDOR will be responsible for resolving them within a timeframe agreed upon in the project timeline. The LIBRARY reserves the right to withhold final payment or delay go-live authorization until acceptance criteria are met. The VENDOR and LIBRARY will jointly document any defects identified, assign severity classifications, and agree on resolution timelines

## VIII. Support

### Help Desk and Case Management

- VENDOR will provide a help desk accessible via telephone, email, and web portal during LIBRARY operating hours (currently 7:00 AM – 7:00 PM ET), Monday through Sunday, subject to change)
- VENDOR will provide a web-based case management portal that allows the LIBRARY to submit, track, update, and close support cases. Cases will be assigned a unique identifier and VENDOR will provide status updates at defined intervals until resolution
- A designated subset of LIBRARY staff will be authorized to submit support cases and reports of defects or availability issues on behalf of the LIBRARY

### Service Level Agreement (SLA)

- VENDOR will respond to and resolve support cases in accordance with the SLA

- Communications
  - Communicates planned updates in a timely manner
  - Emergency updates are shared with LIBRARY in advance by email or message alert
  - Provides documentation prior to improvements and enhancements made to the system
- Performance & Availability
  - Planned updates take place at a time agreed upon by the LIBRARY and VENDOR. The LIBRARY prefers a timeframe of lowest usage and overnight hours
  - Planned updates do not disrupt the running of scheduled background processes

Enable access to a wider User Group

- VENDOR will provide the LIBRARY access to an ILS user community through which LIBRARY staff may access user-generated reports, queries, and workflow resources, and through which the LIBRARY may submit and vote on feature requests

**IX. Not Included in Scope of Services:**

- The LIBRARY understands that most qualifying ILSs include a traditional online public access catalog (OPAC). The ILS must be compatible with Aspen Discovery. Though the LIBRARY is interested in learning information about the capabilities of a VENDOR's Unified Discovery Service, replacement of the LIBRARY's existing Discovery Service, Aspen Discovery, is not in scope of this RFP.
- The LIBRARY does not participate in any Interlibrary Loan (ILL) activities. ILL is not in scope of this RFP.

4. **PRELIMINARY SCHEDULE:** These dates and times are subject to change by the LIBRARY:

Task	Date	Time
Announce and post RFP	04/30/26	TBD
Question Submission Deadline	05/11/26	6:00 p.m.
Response to Questions Posted	5/18/26	6:00 p.m.
RFP Proposals Due	06/29/26	5:00 p.m.
RFPs Evaluated	06/30/26-7/28/26	
RFP Proposal Workshop	07/29/26	TBD
VENDORS Short-Listed for Demos and Presentations	07/30/26	TBD
Inform Short-Listed VENDORS	07/30/26	6:00 p.m.
Short-Listed VENDORS Demos and Presentations	08/13/26-8/27/26	
RFP demos and presentations Workshop	08/28/26	TBD
Short-Listed VENDORS Ranked	8/31/26	TBD
Inform VENDORS of Short-Listed Rankings	08/31/26	6:00 p.m.
Orange County LIBRARY District Board of Trustees Ranking of VENDORS	09/10/26	6:00 p.m.
Contract Negotiation	09/11/26-9/25/26	
Tentative Date to Award Contract	09/25/26	
Tentative Contract Start Date	09/28/26	

5. **QUESTIONS AND RFP PROJECT MANAGER:** To ensure your proposal is responsive, you are encouraged to seek clarification or guidance on any issues related to this solicitation before submitting your response. All questions regarding this RFP should be made in writing via email to the RFP Project Manager listed below.

**Name:** Lynette Schimpf  
**Email:** [oclsbids@ocls.org](mailto:oclsbids@ocls.org)

Questions will only be accepted via email. Please send all questions to [oclsbids@ocls.org](mailto:oclsbids@ocls.org) with the subject **OCLS RFP ILS 26-002**.

**All questions must be received by 6:00 p.m. EST on 5/11/2026.**

**Responses will be posted by 6:00 p.m. EST on 5/18/2026 at: <https://ocls.org/board-trustees/advertised-solicitations>**

When required, the LIBRARY will issue an addendum to the RFP. The addendum shall be available on the Internet at <https://ocls.org/board-trustees/advertised-solicitations> for access by VENDORS.

6. **CONE OF SILENCE: VENDORS SHALL NOT CONTACT, COMMUNICATE WITH, OR DISCUSS ANY MATTER RELATING IN ANY WAY TO THIS RFP WITH ANY STAFF MEMBER OF THE LIBRARY OR ANY MEMBER OF THE BOARD OF TRUSTEES UNTIL SUCH TIME AS A CONTRACT IS AWARDED. THE ONLY EXCEPTION IS FOR QUESTIONS SUBMITTED AS OUTLINED ABOVE.**

7. **DELIVERY OF THE PROPOSAL:**

➤ Proposals must be submitted in a sealed envelope and include one paper copy of all responsive documents and one USB device containing all responsive documents.

➤ Envelopes must be marked with:  
1. VENDOR's Name and Address  
2. VENDOR's email  
3. **OCLS RFP ILS 26-002**

➤ **Proposals shall be submitted no later than 5:00 p.m. EST, on 6/29/2026 to:**

Orange County Library System  
Attn: Lynette Schimpf, Chief Project Officer  
5<sup>th</sup> Floor Human Resources Reception Desk  
101 E. Central Blvd.  
Orlando, FL 32801

➤ VENDORS are responsible for the timely delivery of their proposal. The LIBRARY will not accept emailed or faxed proposals. **The date for receipt of Proposals will be strictly observed.** The LIBRARY shall not be responsible for late deliveries or mail delays. VENDORS accept all risks of late delivery of proposals regardless of fault. Proposals received after the specified time and date shall be considered non-responsive and will not be opened or considered.

➤ The date stamp and clock in the LIBRARY's 5<sup>th</sup> Floor Human Resources Reception Desk shall serve as the official authority to determine the timeliness of the proposal.

- All Proposals must be signed by an officer or employee having authority to legally bind the VENDOR.
  - The decision to refuse consideration of a proposal received after the established deadline in the solicitation or to reject a proposal for failure to comply with the requirements of this RFP shall not be grounds for a protest.
  - If a proposal contains any trade secret or information deemed confidential, in accordance with Chapter 119 of the Florida Statutes, provide an additional redacted version of your proposal labeled REDACTED and referencing the specific statutory citation(s) for such exemption(s). Electronic copy shall be in Microsoft Word or PDF – the most recent software version. Such information is not solicited, nor desired, as information to be submitted in Proposals. In no event will the LIBRARY be liable in any manner whatsoever to the VENDOR if the VENDOR submits information which the VENDOR believes is confidential or exempt from the Public Records Act and which the LIBRARY, in its sole discretion, deems not to be confidential or exempt. Submitted proposals that are marked “confidential” (or other similar language) in their entirety or those in which a significant portion of the submitted proposal is marked “confidential” may be deemed non-responsive by the LIBRARY.
  - The LIBRARY is not obligated to agree with the VENDOR’s claim of an exemption and, by submitting a proposal, the VENDOR agrees to be responsible for defending its claim that each and every portion of the separately marked information is exempt from inspection and copying under the Public Records Act. The VENDOR agrees that it shall protect, defend, and indemnify the LIBRARY for any and all claims (including those claims brought by the LIBRARY), damages, losses, and expenses, including attorney’s fees and costs, arising from or relating to the VENDOR’s claim that the separately marked portions of its proposal are not subject to disclosure. If the VENDOR fails to separately mark portions of its proposal or marks its proposal “confidential” (or other similar language) in its entirety, the LIBRARY is authorized to produce the entire proposal submitted by the VENDOR in responding to a public records request.
  - All information submitted will become part of the Project file (even if non-responsive) and, unless otherwise exempt or confidential in accordance with Florida law, will become a public record. All proposals and accompanying documentation will become the property of the LIBRARY and will not be returned. A proposal may be withdrawn for consideration; however, it will not be returned and remains a public record.
  - Any proposal may be withdrawn prior to the date and time the proposals are due. Any proposal not withdrawn prior to the date and time proposals are due will constitute an irrevocable offer, for a period of ninety (90) days, to provide the LIBRARY with the services as specified in the proposal.
8. **SUBMITTAL INSTRUCTIONS:** Proposals must be submitted on 8-1/2" X 11" paper, 12-point font, pages numbered, with headings, sections, and sub-sections that directly

correlate/address specifically ALL required submittal information in their respective order identified below. VENDORS must submit one paper copy and one electronic copy on a USB device in a sealed envelope. Electronic copy shall be in Microsoft Word or Adobe – the most recent software version. VENDORS shall submit the following information with the Proposal:

- a. **Cover Letter** – A signed cover letter on company letterhead summarizing the VENDOR’s interest in the Project, understanding of the scope of services, and commitment to comply with all applicable procurement and contracting requirements. Include the name, title, phone number, and email address of the primary contact person authorized to negotiate and bind the VENDOR.
  
- b. **Company Profile and Qualifications** –
  - A brief history of VENDOR’s company, including years in business, office locations, ownership structure, and relevant licenses or certifications.
  - Description of VENDOR’s experience in delivering Integrated LIBRARY Services (ILS) to public libraries comparable in size and service population to the Orange County Library System (OCLS).
  - Provide confirmation that the VENDOR complies with the Florida Division of Corporations registration and permit requirements to do business in Florida.
  
- c. **Project Team and Key Personnel** -- Identify the proposed Project manager and key team members who will be assigned to the Project. Provide resumes that describe qualifications, professional experience, and relevant Project roles. Identify any proposed subvenders and their specific responsibilities.
  
- d. **Completed Requirements Form (Appendix A)** - VENDORS must complete the **Appendix A: Requirements** form in its entirety, indicating whether each requirement is Fully Supported, Partially Supported, or Not Supported. Responses should be accurate and reflect the solution as proposed, not future or hypothetical capabilities unless clearly noted.
  
- e. **Project Understanding, Approach and Schedule** – A concise statement demonstrating the VENDOR’s understanding of the LIBRARY’s needs and project objectives. A detailed Proposed Approach that includes a description of the methodology for scoping and implementing the project and a detailed timeline for the project and detailed schedule of Support.
  
- f. **Relevant Project Experience** -- Descriptions of at least three (3) peer-sized projects completed within the past five (5) years involving ILS implementation. Each example should include:
  - Client name and location;
  - Project description and scope;

- Year completed;
- Contact information for a reference to be contacted by the LIBRARY.

g. **Completed Fee Proposal (Appendix B)** -- A detailed schedule of Costs for the VENDOR's work associated with the Project. The LIBRARY relies on the VENDOR to ensure that all charges to complete the scope of work are submitted in the proposal and that there are no hidden costs or charges that will be incurred by the LIBRARY. Include the total cost by task or phase.

- Optional and Add-On Costs:
  - VENDOR will identify and price any optional services or add-ons not included in the base proposal.
- Price Escalation:
  - VENDOR will specify any annual price escalation terms, including the basis for escalation (e.g., CPI index, fixed percentage) and the maximum allowable increase per year.

h. Signed VENDOR's Acknowledgement document available at the end of the RFP.

9. **SELECTION PROCESS:** Proposals will be evaluated in accordance with the criteria and procedures established by the LIBRARY. The selection process is designed to ensure a fair, transparent, and competitive evaluation of all qualified proposals. The LIBRARY desires to select at least three (3) VENDORS to be scheduled for Presentations/Demonstrations. The LIBRARY may request additional material, information, references, interviews, or presentations from some or all the VENDORS submitting proposals. The RFP rankings will be posted to the LIBRARY's Procurement Portal and will be submitted to the LIBRARY's Board of Trustees for final approval.

#### a. RFP Response Evaluation

LIBRARY will assess whether VENDOR meets minimum requirements of RFP. LIBRARY will then evaluate and score written responses and select at least three (3) VENDORS for Demonstrations and Interviews.

- **Initial Review.** All proposals received by the submission deadline will be reviewed for responsiveness and compliance with the requirements of this RFP. Proposals determined to be non-responsive or incomplete may be rejected without further evaluation.
- **Evaluation Committee.** An evaluation committee designated by the LIBRARY will review and score all responsive proposals in accordance with the evaluation criteria below. The committee may request additional information, conduct interviews or presentations, or seek clarification from VENDORS as needed.

- **Evaluation Criteria.** Responsive proposals will be evaluated based on, but not limited to, the following criteria:

Technical and Functional Requirements*		<b>50%</b>
- Must Have Requirements	35%	
- Additional Functionalities	15%	
Maintenance, Support, SLA		<b>15%</b>
Experience, References, Background, Qualifications		<b>15%</b>
Price		<b>10%</b>
Project Management		<b>10%</b>

\*Technical and Functional Requirements listed in **Appendix A: Requirements**, will be evaluated using a points-based scoring system, with each requirement weighted according to its priority/importance. Higher scores will be awarded for full support of higher-priority requirements, with partial support receiving proportionally reduced points and non-support receiving minimal or no points.

**b. Demonstrations and Interviews**

VENDORS selected will provide demonstrations of their proposed ILS to illustrate how the ILS will meet Must Have requirements and highlight additional functionalities in **Appendix A**. LIBRARY will assess functionalities demonstrated by VENDOR and may request clarification from VENDOR.

**c. Evaluation of Demonstrations and Interviews.**

The LIBRARY will evaluate and score demonstrations, interviews, products, and proposals of the finalist VENDORS. The evaluation criteria may include information already collected, and LIBRARY may request additional information from VENDOR for evaluation. The LIBRARY will evaluate VENDOR on criteria that will be shared before the demonstration and interview and will include VENDOR’s ability to provide an ILS that will meet the LIBRARY’s needs and costs associated with implementing and operating the ILS, amongst other criteria. The LIBRARY may choose to contact current or former VENDOR clients not submitted by VENDOR as a reference in the VENDOR’s response to the RFP. The LIBRARY may weigh these against the functionality of VENDOR’s product to reach a final decision.

**d. Recommendation and Award.**

Following evaluation, the committee will recommend the VENDOR to the Library Board of Trustees whose submission is determined to be the most advantageous to the LIBRARY, considering qualifications, technical merit, service capability, and price. The LIBRARY reserves the right to negotiate final terms and to award the contract in the best

interest of the LIBRARY. Selected VENDOR will be presented to the LIBRARY's Board of Trustees for final approval.

- e. **Protests.** Failure to file a protest to the LIBRARY's RFP Project Manager, Lynette Schimpf, by 5:00 PM EST on the third full business day after the award announcement shall constitute a waiver of protest proceedings.

10. **THE CONTRACT:** The selected VENDOR will be required to enter into a written contract with the LIBRARY that will be governed by Florida law and will contain all legal requirements applicable to the LIBRARY. This includes, but is not limited to the following requirements, which are non-negotiable

- a. The VENDOR providing insurance naming the LIBRARY as an additional insured;
- b. That the VENDOR indemnify and hold harmless the LIBRARY, its officers, directors, and employees, to the fullest extent permitted by law from and against all claims, damages, losses, liens, and expenses (including attorney's fees) for the breach of the contract and the negligent, reckless, or wrongful actions and inactions by the VENDOR and persons employed or utilized by VENDOR in the performance of the contract;
- c. That the LIBRARY will not be liable to VENDOR for indirect, direct, special, or consequential damages, including, but not limited to, loss of revenue, loss of profit, cost of capital, or loss of opportunity regardless of whether such liability arises out of contract, tort (including negligence), strict liability, or otherwise;
- d. The LIBRARY cannot indemnify, hold harmless or limit the liability of the VENDOR;
- e. That the VENDOR must comply with applicable public records laws under Chapter 119 of the Florida Statutes;
- f. That the length of the contract with the selected VENDOR will be for a TBD-year period. The contract may be renewed for TBD years. The renewal period will be at the sole discretion of the LIBRARY and may be subject to the negotiation of new terms and conditions;
- g. That delays in deadlines, determined by the LIBRARY to be thirty days after the agreed-upon deadlines as set forth in the contract to be awarded by the LIBRARY, shall be cause for liquidated damages of \$150 per calendar day. VENDOR will be responsible for all delays, whether caused by VENDOR or caused by a third party; and
- h. That the LIBRARY operates with taxpayer funding, and therefore, the LIBRARY may terminate the agreement with VENDOR at any time and for any reason. If terminated by the LIBRARY, all costs and expenses incurred by VENDOR and approved by the LIBRARY in connection with the project will be paid by the LIBRARY.

If there are provisions listed above to which a VENDOR's company cannot agree, the VENDOR should not submit a proposal. This RFP and the proposal from the selected VENDOR will be included and incorporated in the final contract. The order of contract precedence will be the contract, this RFP and the proposal.

11. **FEDERAL AND STATE TAX:** The LIBRARY is exempt from Federal and State Sales and Use Taxes for tangible personal property (Certificate of Registry for tax transactions under Chapter 32, Internal Revenue Code and Florida Sales/Use Tax Exemption Certificate). The Chief Financial Officer will sign an exemption certificate submitted by the VENDOR. VENDORS doing business with the LIBRARY shall not be exempted from paying sales tax to their suppliers for materials to fulfill contractual obligations with the LIBRARY, nor shall any VENDOR be authorized to use the LIBRARY's Tax Exemption Number in securing such materials.
12. **ACCEPTANCE/REJECTION/CANCELLATIONS:** The LIBRARY reserves the right to:
- a. Accept or to reject any or all Proposals and to make the award to that VENDOR who, in the opinion of the LIBRARY, will be in the best interest of and/or the most advantageous to the LIBRARY.
  - b. Reject the Proposal of any VENDOR who has previously failed in the proper performance of an award or to deliver on time contracts of a similar nature or who, in the LIBRARY's opinion, is not in a position to perform properly under this award.
  - c. Waive any irregularities and technicalities and may, in its discretion, reissue the RFP.
  - d. Request clarification of information submitted and to request additional information of one or more Proposers after the deadline for receipt of Proposals.
  - e. To cancel an award of contract any time before the execution of the contract by both parties.
13. **VENDOR'S COST TO DEVELOP THE PROPOSAL:** Costs for developing responses responsive to this RFP are entirely the obligations of the VENDOR and shall not be chargeable in any manner to the LIBRARY.
14. **PROHIBITION AGAINST CONSIDERING SOCIAL, POLITICAL, OR IDEOLOGICAL INTERESTS:** The VENDOR is hereby notified that Section 287.05701, Florida Statutes provides that the LIBRARY may not request documentation of or consider a VENDOR's social, political, or ideological interests when determining if the VENDOR is a responsible VENDOR.
15. **CONFLICTS OF INTEREST:** The award is subject to provisions of applicable Florida law and LIBRARY Procedures. All VENDORS must disclose with their proposal the name of any officer, director, or agent of the VENDOR who is also an employee the LIBRARY. Further, all Proposers must disclose the name of any LIBRARY employee who owns, directly or indirectly, an interest of ten percent or more in the VENDOR or any of its entities.
16. **CONVICTED VENDORS:** A person or affiliate placed on the convicted VENDOR list pursuant to Section 287.133 of the Florida Statutes following a conviction for a public entity crime is prohibited from submitting a bid, response, or entering into a contract to provide any goods or services to the LIBRARY for a period of thirty-six months from the date of being placed on the convicted VENDOR list.

17. **DISCRIMINATORY VENDOR:** An entity or affiliate placed on the discriminatory VENDOR list pursuant to Section 287.134 of the Florida Statutes is prohibited from submitting a bid, response, or entering into a contract to provide any goods or services to the LIBRARY for a period of thirty-six months from the date of being placed on the discriminatory VENDOR list.
18. **DRUG FREE WORKPLACE:** By submission of a Proposal in response to this solicitation, the VENDOR acknowledges the LIBRARY's Drug Free Workplace requirement applies to the VENDOR.
19. **RULES OF CONDUCT:** The VENDOR will share the LIBRARY's Rules of Conduct with their staff and by submitting a Proposal represents their employees will adhere to the Rules of Conduct. A copy of the LIBRARY's Rules of Conduct can be reviewed here [https://ocls.org/wp-content/uploads/2024/11/ROC\\_English\\_2024.pdf](https://ocls.org/wp-content/uploads/2024/11/ROC_English_2024.pdf)

**OCLS RFP ILS 26-002  
REQUEST FOR PROPOSALS  
Integrated LIBRARY System  
For the Orange County LIBRARY District**

**VENDOR's ACKNOWLEDGEMENTS**

By submitting a qualification package to the RFP, the VENDOR:

- a. Acknowledges he/she has received, reviewed, and understands the requirements of the RFP, including the Scope of Work.
- b. Acknowledges that the LIBRARY is not subject to state or local sales, use or excise taxes.
- c. Acknowledges that the VENDOR's proposal package shall be considered accepted only when the LIBRARY executes a contract.
- d. Acknowledges that the contract will incorporate all terms and conditions contained in the RFP and VENDOR's proposal package, and that the terms of the contract will prevail in the event of a conflict.
- e. Affirms that it is aware that comparison of qualification packages is a subjective process requiring evaluation of multiple factors including references, recommendations, and input from third parties. This process requires subjective assessment of VENDORS by the LIBRARY Trustees as to overall suitability of the VENDOR based on multiple variables.
- f. Acknowledges the LIBRARY's Board of Trustees have complete discretion in accepting a proposal package based on the Board of Trustee's evaluation of multiple variables.
- g. Affirms that it is aware of the provisions of Section 287.133(2)(a) of the Florida Statutes and that at no time has VENDOR been convicted of a public entity crime.
- h. Affirms that it is aware of the provisions of Section 287.134(2)(a) of the Florida Statutes, and that at no time has VENDOR been placed on the discriminatory VENDOR list.
- i. Affirms that it is not currently under suspension or debarment by the State of Florida or any other governmental authority.
- j. VENDOR does not use coercion for labor or services as defined in section 787.06, Florida Statutes.
- k. Attests under penalty of perjury pursuant to Section 287.138 and 692.201, 692.202, 692.203, and 692.204, Florida Statutes, the following:
  - I. VENDOR is not owned by the government of a foreign country of concern as defined in Section 287.138, Florida Statutes.
  - II. The government of a foreign country of concern does not have a controlling interest in VENDOR.
  - III. VENDOR is not owned or controlled by the government of a foreign country of concern, as defined in Section 692.201, Florida Statutes.
  - IV. VENDOR is not a partnership, association, corporation, organization, or other combination of persons organized under the laws of or having its principal place of business in a foreign country of concern, as defined in Section 692.201, Florida Statutes, or a subsidiary of such entity.
  - V. VENDOR is not a foreign principal, as defined in Section 692.201, Florida Statutes.
  - VI. VENDOR is in compliance with all applicable requirements of Sections 692.202, 692.203, and 692.204, Florida Statutes.
  - VII. If VENDOR is a common carrier under Section 908.111, Florida Statutes, VENDOR is not willfully providing and will not willfully provide any service during the contract term in furtherance of transporting a person into this state knowing that the person is an unauthorized alien, except to facilitate the detention, removal, or departure of the person from this state or the United States.

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VENDOR's printed name and title

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VENDOR's signature and date

