



Request for Proposal Library Services Platform HMCPL

Timeline:

Issue date of RFP: November 14th, 2012

Due date for RFP responses: January 17th, 2013

Review process and vendor selection: February-March, 2013

Board approval of contract: April 2013

Implementation: by February 2014

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1. Basic Information

1.1 Request for Proposal

The Huntsville-Madison County Public Library (HMCPL) is seeking proposals from qualified vendors for a new library services platform (LSP) with 3 year costs. Pricing should specify initial purchase price and annual maintenance costs for each contract/subscription year. Include pricing for any subsequent annual or periodic renewals. Specify and explain if a different contract term is proposed.

In the case of any specific requirements listed below that need qualification, please include all exceptions and evaluations in the response to this RFP. The library reserves the right to seek clarification from vendors during the process.

Please note: In this RFP, the term “library services platform”¹ replaces the phrase “integrated library system” (ILS). While an ILS is associated with print-oriented products, HMCPL is pursuing a system capable of handling the integration of multiple resources, internal and external services, as well as a customizable web platform.

1.2 Evaluation of Proposals

The HMCPL Library Services Platform Committee will review proposals based on the below criteria. Pricing will remain sealed until evaluation of all the technical responses is completed.

- Functionality

¹ Breeding, Marshall. "The Beginning of the End of the ILS in Academic Libraries." *Smart Libraries*. 31.8 (2011): 1-3. Print.

- Customer reference checks
- Customer support services and ratings
- Third party product integration
- Number of existing public library installations
- Development history
- Future development plans
- Scalability features
- Systems reliability and availability features
- Security features

Possible vendor demonstrations may be included in the process.

HMCPL reserves the right to reject any and all proposals. The Library also reserves the right implement all or portions of the proposal. Failure to comply with the requirements of this RFP may result in disqualification. The Library reserves the right to terminate, without cause, any award made as a result of this RFP by providing a 30-day letter of notification to the successful proposer.

1.3 Contract Negotiation

Following the review of the proposals, the LSP Committee and the Executive Team of HMCPL will authorize contract negotiation with the preferred vendor. Negotiation assumes that the terms of the RFP and the vendor's responses will be incorporated into the contract except as amended by mutual agreement. If contract negotiation fails, the library reserves the right to pursue a different vendor.

1.4 Library Contacts

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Aaron Sakovich
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(256) 532-5964

Table 1 Library Contacts

915 Monroe Street
Huntsville, AL 35801

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Huntsville, AL 35804

Table 2 Library Mailing Addresses

2. Background Information

2.1 Library Overview

HMCPL² is a countywide system with 12 physical locations³ and a bookmobile. Our primary sources of funding are the City of Huntsville, the Madison County Commission, as well as municipalities within Madison County including Madison, New Hope, Gurley, and Triana. Additional sources of funding include the Huntsville Library Foundation, Friends of the Library organizations, the Alabama Public Library Service, grants received from private foundations, endowments, and gifts. We serve an estimated population of 340,111⁴ with 138 employees.

2.2 Current Automation

HMCPL is currently using SirsiDynix Symphony 3.4.1 for our staff interface along with SirsiDynix Enterprise 4.2.1 for our discovery interface. The following modules and functionality are used:

- Circulation
- Acquisitions
- Cataloging
- Serials
- Offline
- Debt collection
- Reports

Additionally, HMCPL uses third party software that employs SIP2 that will communicate with the LSP. Third party hardware and software includes:

² Reference: <http://hmcpl.org/history>

³ Reference: <http://hmcpl.org/locations>

⁴ United States Census Bureau, 2011 estimate

- Bibliotheca-ITG RFID
- Envisionware PC Reservation
- Envisionware LPT:One
- Centec Self-check
- Overdrive's Digital Media Zone
- Bluesocket wifi authentication

Future plans may also include automated material handlers.

2.3 Internet Connectivity and Services

HMCPL's Main location has a 20 megabit per second (Mbps), hardware firewalled, fiber connection to the City of Huntsville's fiber loop. Two locations, Bailey Cove and Madison, have 10 Mbps Metro-Ethernet connections to the Main location. All other locations have a copper T1 or fractional T1 that terminates at the Main location. All Internet access is filtered to achieve Children's Internet Protection Act (CIPA) compliance using an M86 Web Filter hosted by the Alabama Research and Education Network (AREN); AREN provides Internet services to HMCPL, including email and web hosting for the HMCPL website.

HMCPL's remote wireless access is provided via the location connections with access points (AP) at each location. WiFi standards include 802.11 a/b/g. Public access is unencrypted; staff access uses WPA2 PSK with AES encryption.

Internal systems use Windows Active Directory for authentication at all locations. Servers include a combination of Windows 2003, Linux, and OS X, for administrative, Intranet, and communications services.

VPN services are provided for inbound staff use, as well as outbound services to the existing SirsiDynix SaaS hosting facility to encrypt patron information.

2.4 Statistics for HMCPL

The information collected herein is effective October 1, 2012.

Number of Physical Locations ⁵	12
Number of Outreach Services ⁶	3
Number of Bibliographic Records	293,465
Number of Item Records	555,365
Number of Serial Records	1,150
Number of Authority Records	219,392
Number of Active Patron Cards ⁷	135,236
Number of All Patron Cards (includes expired)	171,925
Annual Circulation ⁸	2,049,590
Number of OPACs	24
Number of Staff Workstations ⁹	133

Table 3 HMCPL Statistics

⁵ Stable over 15 years. Future plans may involve location consolidations or expansions within the next 3 years.

⁶ Outreach, Bookmobile, and Juvenile Detention Services

⁷ Inactive patron cards are purged annually after 3 years of inactivity.

⁸ 2011 annual circulation statistics

⁹ Staff workstation quantities will typically be in the 1 – 6 range for most locations.

3.LSP Functionality

3.1 Functionality Overview

HMCPL seeks to advance our automation capabilities with an LSP from a forward-thinking company with a well-developed and full-featured product suite. The product must be suited for a multi-location system, while providing flexibility for the individual locations. Consistent with the precepts of an LSP, the system must integrate all physical and digital content and services in a seamless, unified database. The database shall be interactive and real-time, not batch driven.

The LSP should support a modern, customizable discovery interface with enhanced content, interactive social media features, a modular single-sign-on, and provision for mobile support. The discovery interface should allow access to all physical and digital content and services integrated within the LSP.

The LSP must support advanced holds processing, resource sharing throughout the country, provide enhanced as well as customizable reporting and accounting by individual location or department, allow multiple methods of communications for notices and messaging, and support open standards for maximum third party integration. The system shall utilize a modular interface that allows for multi-task functionality, utilize open standards for the user interface, an open API for programming and customization, and provide an online context-sensitive help.

The use of a proprietary, embedded, or non-relational database management system (DBMS) is strongly discouraged. The DBMS proposed must support the International Organization for Standardization and International Electrotechnical Commission (ISO/IEC) standard Structured Query Language (SQL). The use of proprietary plugins for user interface components is also discouraged. The use of a UNIX or UNIX-like server operating system is encouraged.

The product must conform to National Information Standards Organization (NISO) standards, specifically NISO Circulation Interchange Protocol (NCIP) and ANSI/NISO Z39.50. The product must maintain backwards compatibility with the 3M Standard Interchange Protocol version 2 (SIP2).

3.2 System Administration

Describe the basic functions of this subsystem, in particular addressing the points listed below.

1. Centralized administration for functions, policies, rules, users, groups, security, and task scheduling.
2. The ability to customize granular protections and permissions for groups, users, functions, and data.
3. Availability of ready and custom scripting, using a common scripting language (e.g., Perl, PHP, Ruby) with a published API, for routine tasks.
4. The ability to set client defaults and customize hotkeys.
5. Any required scheduled maintenance, duration of said maintenance, and frequency of tasks. Document if any of this requires the system to be taken off-line or made unavailable for patron or staff use.
6. An off-site database backup capability, physically separate from the master database location (e.g., at HMCPL if a hosted solution is provided, or “in the cloud” if an HMCPL host is recommended).
7. The ability to globally edit groups of data (e.g., remove discard records with attached fines or bills, change home location).
8. Ability to globally establish calendars and universally backdate due dates for unscheduled closures.
9. Ability to import, export, and batch load records.
10. The network bandwidth required based on the number of workstations at each location. If the solution is hosted by HMCPL, include all bandwidth requirements (inter-site, intra-site, and Internet) assuming the server(s) are located at the Main location.

3.3 Statistics and Reporting

Describe the basic functions of this subsystem, in particular addressing the points listed below.

1. Both built-in and custom reports.
2. Ability to export report data into open formats, including CSV.
3. Ability to accurately count item adds and withdrawals based on location.
4. Generating patron, item, and bibliographic lists as well as record counts.
5. Generating statistics on all functions, to include, but not limited to, circulation, cataloging, acquisitions, and Interlibrary Loan (ILL).
6. Generating statistics on item use.
7. Capacity to track and reconcile accounting by payment library, bill reason, and payment type (cash, check, credit).
8. Ability to produce cataloging and database statistics including counts of records modified, added, or deleted by cataloger login.
9. Available outputs for statistical data such as home library, location, item type, time of day, etc.
10. Capability to produce real-time statistics online and printing or emailing these reports as needed.
11. Ability to run reports while libraries are open and without degrading response time.

3.4 Discovery Interface

Describe the basic functions of this subsystem, in particular addressing the points listed below.

1. Administrative control over layout, design, display, and preferred location item ranking in a multi-location system.
2. A flexible hold system, including the ability to:
 - a. Place holds for multiple titles under a single login
 - b. Place holds for on-order titles
 - c. Place holds for on-shelf titles
 - d. Suspend holds and enter a “date no longer needed”
 - e. Change pickup locations
 - f. Clearly distinguish between a hold and ILL
 - g. Notification to staff of patron-canceled holds through the discovery interface.
3. Multiple search options, including:
 - a. Keyword search on all fields
 - b. Relevancy ranking
 - c. Sorting based on multiple fields
 - d. Faceted searching
 - e. Meta-searching (aka “federated”)
 - f. Limiting by format, category, collection, item status, location, publication date, genre, etc.
 - g. New items and titles recently added by format.

4. Spelling suggestions (“did you mean?”) and reading suggestions based on selection “Readers who liked this also liked...”
5. Patron access to their own accounts, including:
 - a. Renewing material
 - b. Optional self-registration and contact management that can be disabled at a system-level
 - c. Creating, editing, sorting, and printing or emailing reading lists
 - d. Fines and bills owed and payment history
 - e. Online fine payment
 - f. Items currently checked out
 - g. Available and pending holds
 - h. Ability to change PIN
 - i. Ability to request a PIN reset
 - j. Integration with Library Elf or similar functionality.
6. Search display options which include:
 - a. Enhanced content, library events, and social media integration
 - b. Exporting search results to various citation formats
 - c. Serial holdings by location and department including issues recently received
 - d. Copies on order by location
 - e. Availability by location or department.
7. Access to physical and digital content and services:
 - a. Call number
 - b. Shelf location with options for integrated graphical maps
 - c. Shelf browsing capability
 - d. Links to digital resources.
8. Support for modern web browsers:
 - a. Most recent and last version support for the 4 major browsers (Internet Explorer, Safari, Firefox, and Chrome)
 - b. Not requiring any proprietary plugins for discovery interface access (e.g., Adobe Flash, Oracle Java).
9. Displaying alternative renderings, including:
 - a. ADA-compliant view
 - b. Mobile view
 - c. Children’s view
 - d. International language variants.
10. URL link validation.

3.5 Circulation

Describe the basic functions of this subsystem, in particular addressing the points listed below.

1. Patron records:
 - a. The capability to create customizable templates for patron record fields to meet HMCPL's needs
 - b. The ability to search patron records by various fields (e.g., address, city, state, ZIP Code, phone numbers, email addresses).
2. Print capability from any screen.
3. Pre-filled default portions of patron barcodes for ease of use in the staff and public clients where the entry must be manually made.
4. Offline mode.
5. Custom receipt printing.
6. Holds:
 - a. Expiring holds due to order cancellations
 - b. Expiring holds and automatically releasing items due to a default expiry period
 - c. The ability for staff to modify hold suspensions
 - d. Generating patron notifications for hold pickups and cancellations
 - e. The ability to print a vertical holds slip for patron pickup
 - f. The ability to place system-wide title and item-level holds
 - g. The ability to place blanket holds on titles for book clubs
 - h. Staff notification on items marked lost, missing, or discarded for held titles.
7. Notices:
 - a. The ability to provide multiple notice and message options, including print, email, SMS, and RSS
 - b. The ability to send notices for hold pickups, overdues, bills, advanced due date notification, as well as custom messages
 - c. The ability to display notice history in patron records.
8. The ability for staff to void or undo payment transactions.
9. The ability to link family members' cards.
10. The ability to provide a range of audible and/or visual signals for various staff alerts.
11. The ability for staff to override functions.
12. Debt collection through our collection agency interface, Unique Management.
13. The ability to interface with multiple vendors for patron validation, RFID, self-checkout, and other third-party applications.
14. The ability to set granular limits for checkouts and renewals on a variety of item types and locations.
15. The ability to manage or modify claims returns.
16. Determining item history to allow investigation of any damage to an item.

3.6 Interlibrary Loan

Describe the basic functions of this subsystem, in particular addressing the points listed below.

1. The ability to lend within system and across other systems.
2. The ability for patrons to make ILL requests via the discovery interface.
3. The ability to ensure copyright compliance.
4. Any innovative features you may offer to help manage and reduce shipping costs.

3.7 Serials

Describe the basic functions of this subsystem, in particular addressing the points listed below.

1. Serials check-in.
2. The ability to customize prediction patterns.
3. The ability to have the owning agency and price carry over to each issue.
4. Automatic generation of publication date and volume prediction for each successive issue.
5. When receiving periodicals owned by more than one branch in the library, the ability to enter bib number once and to receive for designated branches.
6. The ability to search by bibliographic number, title, ISSN when receiving.
7. The ability for incorporation and management of records for electronic serials.
8. The ability to perform electronic claiming.

3.8 Cataloging

Describe the basic functions of this subsystem, in particular addressing the points listed below.

1. The ability to import MARC bibliographic and authority records from outside sources (OCLC, LC, vendors, etc.).
2. The ability to combine and overlay records from bibliographic utilities, using library defined match points to control duplicates.
3. Z39.50 and NCIP version 2 compliance.
4. Automated holding updates to OCLC.
5. Automated authority control including:
 - a. Periodic updates to our authority database
 - b. Addition of any missing fields to the library's authority formats
 - c. Verifying that linking is correct
 - d. Deletion of obsolete and cancelled authority records
 - e. Deletion of unlinked authority records.

6. A searchable authority file.
7. Adaptability to Resource Description and Access (RDA).
8. Compatibility to the OCLC control number expansion.
9. The ability to shadow (or mask) bibliographic & item records from the discovery interface.
10. The ability to make global changes to bibliographic & item records (global item modification), including MARC editing capabilities.
11. The ability to create and maintain bibliographic records for digital resources (e.g., ebooks, journal articles, databases, digital photographs or videos).
12. The ability to support easy duplicate checking from bibliographic maintenance functions.
13. The ability to print customizable labels.
14. The ability to merge bibliographic records.
15. The ability to import, export, and batch load records.

3.9 Acquisitions

Describe the basic functions of this subsystem, in particular addressing the points listed below.

1. The ability to download MARC records (via the Web) from materials vendors and to use the imported records to create orders automatically within the Acquisitions module, e.g., through the use of 9xx tags.
2. The ability to create and manage vendor records.
3. The ability to search, create, update, receive, cancel, and delete orders by location.
4. The ability to search, create, update, cancel, and delete invoices.
5. Electronic ordering and invoicing via EDI.
6. Reports or tools for:
 - a. Order lines not received
 - b. Outstanding orders
 - c. Removing old orders, including both paid and unpaid, and fund accounts
 - d. Vendor payment history
 - e. Specially funded items (e.g., gifts, grants, or memorials).
7. Funds:
 - a. Granularity for creating account records by specific locations or materials
 - b. Account reporting including monies spent, budgeted, encumbered, and credited by location.
8. Fiscal rollover tools and reports.
9. The ability to flag specially funded items and alert when received.
10. Options for standing orders.

3.10 Outreach

Describe the basic functions of this subsystem, in particular addressing the points listed below.

1. Options for cataloging and circulating kits of materials as a singular entity.
2. The ability to accurately gather statistics on kits of materials including circulation statistics for items within kits.
3. Flexible circulation and renewal options for nursing homes, schools, organizations, teachers, and other entities.
4. The ability for global renewal of large groups of items for all outreach patrons.

3.11 Inventory

Describe the basic functions of this subsystem, in particular addressing the points listed below.

1. Tools for facilitating inventory, including:
 - a. Supported input devices
 - b. Acceptable file formats for uploading data.
2. Full post-inventory reporting, including:
 - a. Mis-shelved items
 - b. Missing items
 - c. Items with incorrect status or collection code.
3. The ability to flag items currently checked out as inventoried.

3.12 Digital Collection Management

Describe the basic functions of this subsystem, in particular addressing the points listed below.

1. The ability to integrate multiple digital formats into the discovery interface.
 - a. Ebooks
 - b. Databases
 - c. Digitized archival photos
 - d. Online journal articles.

2. The ability to manage resources from third party digital content providers that HMCPL has existing or possible future contracts, or cooperative agreements with, including:
 - a. Alabama Virtual Library
 - b. Ancestry Library
 - c. Axis 360
 - d. BookFLIX
 - e. CONTENTdm
 - f. Demographics NOW
 - g. Fold3
 - h. Freading
 - i. Freegal
 - j. Gale Virtual Reference Library
 - k. Heritage Quest
 - l. Homework Alabama
 - m. Learning Express Library
 - n. NoveList
 - o. OCLC Digital Collection Gateway
 - p. Overdrive
 - q. Project Gutenberg
 - r. ReferenceUSA
 - s. Rocket Languages.
3. The ability to provide a modular single-sign-on facility to access all digital services, including the discovery interface, which can be integrated into HMCPL's website.
4. Options for hosting digital content.

4.RFP Submissions

Vendor responses to this RFP should include the following information. Responses should reference requirements by the complete section numbers for all items in sections 3 and 4.

4.1 Software, Operating Systems, and Database

1. Provide a brief summary of functionality for each subsystem. Respond specifically to the functions listed in 3.1 through 3.12.
2. Describe the implementation features, specifically whether a hosted or on-site solution is proposed.
3. Provide the supported operating system(s), database(s), and web services.
4. Describe high-availability features, system redundancy, and backup services.
5. Describe the system architecture, including storage, processing, networking, and especially security features.
6. Specify the methods of system access available for administration (e.g., SSH, SFTP, https).
7. Describe the software upgrade philosophy and methodology, especially downtime requirements for regular or planned system maintenance, including both the core application/database server as well as the discovery interface.
8. Provide a list of all functions that require system-wide settings; location-specific settings will be assumed for all other functions.
9. Call out any unusually strong features relative to industry norms.
10. Call out any features or industry standards that are still in their development phase.
11. Specify all LSP functionality that is dependent upon third-party vendors.
12. Provide a list of third-party vendors that are supported for the discovery interface, downloadable circulation, acquisitions, e-commerce, self-check, public computer control, meeting room scheduling, debt collection, etc.

4.2 Hardware

1. List servers by function; include minimum and recommended technical specifications:
 - a. Application/database server
 - b. Test server

- c. Any backup servers.
2. List minimum and recommended specifications for client workstations.
3. List ancillary recommended hardware.
4. List supported peripherals, especially where limited.
5. Allow for the possibility that HMCPL will buy hardware independent of this contract.

4.3 Customer References

1. Summarize number and type of library customers.
2. Identify select public library customer references, preferably with similar population, circulation, and holdings to HMCPL.
3. For customer references, list contact info, years with vendor, and identify as either consortia of independent libraries or standalone libraries with or without branches.

4.4 Development History

1. Describe last major release (number, release date, and list of enhancements and bug fixes).
2. List minor releases within the past year (numbers, release dates, and lists of enhancements and bug fixes).
3. Describe next scheduled major release (number, projected release date, and list of enhancements).
4. Describe user groups if available. Provide contact information for the user group, especially a website if available to non-customers.
5. Provide a current list of enhancements requested by your user group.
6. Describe the process and pricing for custom programming. Detail your procedure for ensuring the stability of or reinstallation of that code after upgrades.
7. Provide historical availability (expressed in number of seconds of downtime per year) or reliability (expressed as a combination of Mean Time To Failure and Repair – MTTF and MTTR) statistics for the platform. Other metrics (e.g., faults per thousand lines of code) may also be submitted, though they should be considered ancillary.

4.5 Implementation

1. Provide a timeline of implementation activities.
2. Describe the data extraction and migration process, including pre-testing and the number of pulls.

3. Describe the amount of downtime required during the final pull and go-live. Describe if this phase can be performed after hours for our patrons, and if so, at what cost.
4. Provide details on training options during and after the implementation. List ongoing training services. Describe training options provided for each major release. Note if the training can be done on the test server with HMCPL's own configuration.
5. Describe included post-migration support services.
6. List the product documentation that is available to customers and any special requirements or formats the documents are stored in (e.g., PDF, epub, .chm, .webarchive).
7. Describe the scripting services available for custom programming provided by your company.

4.6 Pricing

1. Provide cost for a LSP package that includes system administration, statistics and reporting, discovery interface, circulation, cataloging, acquisitions, offline, debt collection, ILL, outreach, and serials. However, list optional features of these subsystems separately as indicated in 2 below.
2. Provide additional cost, each separately, for optional features.
3. Specify timeframe in which libraries can delay or add functionality at quoted cost.
4. List hardware and hardware installation costs separately.
5. List data pulls and migration costs separately.
6. List training costs separately.
7. List hourly rate for any programming that may be desired for customized discovery interface work.
8. Provide annual maintenance costs for the first 3 years of service, and then for any subsequent one-year renewals.
9. Identify cost structure, if any, for licensing and possible additional locations that could be incorporated into HMCPL in the future. Specify limits on growth, i.e., maximum number of locations, patron records, bibliographic records, or circulation records.

4.7 Warranties

1. Specify maximum size of patron and item databases, and maximum load, managed under the quoted server specifications.
2. Specify the system performance and response time guarantees that will be incorporated into the contract.
3. Warrant that all quoted functionality is available at install date. Detail any exceptions.

4. Warrant free and unrestricted access to the database, or describe any restrictions on access to the database, including the test database.
5. Specify warranty period before maintenance charges apply.
6. Warrant that upgrades are included in the cost of the annual maintenance.
7. Specify hardware warranties if purchased through vendor.
8. Warrant that your product is verifiably compliant under the Payment Application Data Security Standards (PA-DSS) guidelines.
9. Describe post-implementation testing and remedies available for failed functionality or performance.
10. Describe the vendor's problem resolution procedure. List the hours of tech support availability. Provide the typical response times for technical support and problem resolution. List inclusions and exclusions of technical support for problem resolution during the life of the contract.
11. List options available for vendor support contact, including telephone, email, chat/IM, video chat, etc.

4.8 Vendor Information and Contacts

1. Supply a brief description of your company, including position and length of time in the ILS/LSP field, financial stability, and length of time supporting the product in response to this RFP.
2. Indicate the number of fulltime employees (FTE) dedicated to sales versus research and development versus technical support.
3. Supply contact information for the person(s) who can respond to questions about the vendor's proposal.
4. Indicate specific named individuals who will be assigned to the migration process and to this LSP account.

4.9 RFP Certifications and Instructions

1. The RFP must be signed by a company official authorized to commit pricing.
2. **Pricing and the technical response must each be submitted separately in sealed envelopes and labeled as follows:**
 - a. **The words "Sealed Pricing-Library Services Platform Proposal" must be on the outside of the envelope which contains pricing information**
 - b. **The words "Sealed Technical Response-Library Services Platform Proposal" must be on the outside of the envelope that contains the technical response.**
3. Three physical copies as well as one electronic copy (flash drive, CD, or DVD) of the technical response should be submitted in the sealed envelope.

4. The proposal must be submitted to Sherry Sakovich (see 1.4, Library Contacts) no later than 2:00 PM Central Time on Thursday, January 17, 2013.
5. Late submissions will not be accepted nor reviewed. The library will not be responsible for any carrier's failure to deliver a proposal.
6. Proposals received before the due date will be held in a secured area until the time of opening.
7. The technical responses will be opened at 2:00 PM Central Time on Thursday, January 17, 2013 in the Main Library Boardroom, 915 Monroe Street, Huntsville, AL.
8. Pricing will remain sealed until evaluation of all the technical responses is completed.
9. Questions concerning this RFP should be submitted to Sherry Sakovich (see 1.4, Library Contacts).
10. Responses to all questions will be posted to HMCPL's RFP blog located at <http://hmcpl.org/lprfp>. Vendors must subscribe to this blog via email (registration required) or RSS feed in order to receive any updates regarding this RFP.