

Request for Proposal (RFP) Self-Checkout Kiosks for Plainfield-Guilford Township Public Library (PGTPL) RFP # 2021-01

Issue Date: Wednesday, September 1, 2021 Due Date: Wednesday, October 6, 2021

> Contact information: <u>RFPcontact@plainfieldlibrary.net</u>

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1. General Information

1.1 Statement of Purpose

The Board of Trustees of the Plainfield-Guilford Township Public Library (hereinafter referred to as "PGTPL") hereby requests proposals from interested persons ("Proposals") for the delivery, installation, training, and support for self-checkout kiosks for PGTPL's facility located at 1120 Stafford Road in Plainfield, Indiana. The self-checkout kiosk solution shall work seamlessly in conjunction with PGTPL's Integrated Library System (ILS), Evergreen. The self-checkout solution should also be adaptable and compatible with possible future library projects such as self-service lockers (both onsite and offsite) and RFID technology implementation.

The purpose of this Request for Proposal ("RFP") is to attract qualified and experienced offerors ("Offerors") who will provide high-quality service in an economical manner. PGTPL's receipt of any Proposal does not bind or obligate PGTPL in any manner under any circumstances. PGTPL will not become legally obligated unless and until a contract to purchase has been duly approved by the Board of Trustees, in its absolute discretion, and is executed by the parties.

1.2 Calendar of Events

Issuance of RFP	Wednesday, September 1, 2021
Optional Preliminary Meetings	Wednesday, September 8, 2021 - Wednesday, September 22, 2021
Deadline for Questions	Wednesday, September 22, 2021 (5:00pm EDT)
Responses to Questions posted to library website (<u>www.plainfieldlibrary.net/rfp</u>)	Thursday, September 23, 2021 (by 5:00pm EDT)
Proposal Due Date	Wednesday, October 6, 2021 (5:00pm EDT)
Selection of Offerors for Demonstrations	Wednesday, October 13, 2021
PGTPL provides demo expectations to short-listed Offerors	Wednesday, October 13, 2021
Interviews and Product Demonstrations	Wednesday, October 20, 2021- Wednesday, November 3, 2021
Selected Offeror Notification	Wednesday, November 17, 2021
Estimated Project Start	February 2022

1.3 Contact Information, Inquiries, and Proposal Submission

Except during the Offeror's optional preliminary meeting, all inquiries regarding this RFP must be emailed to <u>RFPcontact@plainfieldlibrary.net</u> before Wednesday, September 22, 2021 at 5:00pm EDT.

Responses to any questions received will be posted on the library's website at <u>www.plainfieldlibrary.net/rfp</u> no later than Thursday, September 23, 2021 at 5:00pm EDT. Except during the Offeror's optional preliminary meeting, no other communication of questions and answers will be made.

No interpretation, explanation, or clarification of the RFP by any official, consultant, attorney, or other representative of PGTPL will be considered authoritative or binding on PGTPL unless contained in a written interpretation, correction, or addendum to this RFP. Official interpretations, corrections, or addenda to the RFP will be made available in writing to all potential Offerors that request copies of such documents.

1.4 Library and Project Background

The Plainfield-Guilford Township Public Library (PGTPL) is located in the southeastern corner of Hendricks County, just west of the city of Indianapolis. Hendricks County is the fourth fastest growing county in Indiana. The library district encompasses nearly 40 square miles and serves the residents of Guilford Township. Most of the Town of Plainfield is located within the boundaries of the library district. Guilford Township has posted an 18.7% increase in population from 27,343 in the 2010 Census to 32,443 in 2019.

PGTPL has one location at 1120 Stafford Road in Plainfield, Indiana. The building is open 65 hours per week; it serves approximately 13,484 registered cardholders. The 58,520 square foot library facility was recently renovated in 2020 in response to the needs of the community. The art gallery, meeting rooms, second floor staff office spaces, and signage throughout were updated, new study rooms were added, and all first floor restrooms were completely renovated. Further projects are planned over the next three years. In 2019, PGTPL circulated 408,761 items for an average of 118 circulations per open hour. The library also had 204,379 library visits in 2019.

PGTPL is part of the Evergreen Indiana library consortium. Consisting of over 120 member libraries statewide, the consortium uses the open source Evergreen Integrated Library System (ILS) to share resources through a common catalog and to circulate library materials at individual member locations.

PGTPL has five self-checkout kiosks, but they are approximately a decade old. They are networked with CAT3 Ethernet cabling which will be upgraded to the necessary specs for this project. These units are primarily located near the hold pickup shelves with an additional unit located in the Youth Services department. These kiosks are not able to accept payment nor are they configured to accept the return of materials. Further, the current self-checkout kiosks are not able to promote library events, services, or collections.

PGTPL has four public service desks: the Information Desk, the Youth Services Desk, the Teen Central Desk, and the Indiana Room Desk. Most in-person circulation occurs at the Information Desk, which is within sight of the self-checkout kiosks positioned near the Holds Pickup shelves. The Youth Services Desk circulates a good amount of materials and is within sight of the Youth Services self-checkout kiosk. Circulation from the Teen Central Desk is considerably lower and the Indiana Room Desk provides the least amount of in-person circulation.

With the exception of music CDs and audiobooks, nearly all audiovisual cases feature locking mechanisms. While PGTPL has security gates, they are not actively utilized and will likely be removed in a future renovation. The library does not employ an automated materials handling system and there are no plans to do so. PGTPL does not currently employ an RFID system, but is open to such a solution in the future.

1.5 Proposal Evaluation and Selection Criteria

While cost is an important criteria to PGTPL, it will not necessarily be the controlling evaluation factor. An Evaluation Team will review all proposals to determine which Offerors have qualified for consideration and will develop a short list of Offerors for further consideration. These Offerors will be invited to provide a demonstration of their proposed solution sometime between Wednesday, October 20, 2021 and Wednesday, November 3, 2021. The library will provide an outline describing the components to be included in the presentation. Offerors will have at least one week to prepare their presentations based on the provided outline.

PGTPL reserves the right, at its sole discretion, to request clarifications of proposals or to conduct discussions for the purpose of clarification with any or all Offerors. The purpose of any such discussions shall be to ensure full understanding of the proposal. If clarifications are made as a result of such discussion, the Offeror shall put such clarifications in writing.

PGTPL may investigate the qualifications of any Offeror, require confirmation of information furnished, and require additional evidence of qualifications to provide the self-checkout solution requested by this RFP. PGTPL also reserves certain rights, including, but not limited to, the following: (a) to reject any or all Proposals; (b) issue subsequent RFPs; (c) cancel the entire RFP; (d) remedy errors in the RFP process; (e) appoint evaluation committees to review qualifications and Proposals; (f) seek the assistance of outside technical or other experts to assist in the evaluation process; (g) approve or disapprove of any subcontractor; (h) establish a list of eligible Offerors for discussions or negotiations after review of Proposals; (i) negotiate with any or all Offerors; (j) solicit best and final offers from all, some, or none of the Offerors; (k) purchase the self-checkout solution from all, some, or none of the Offerors; (l) waive formalities and irregularities in the RFP; and (m) purchase a self-checkout solution without discussions or negotiations.

PGTPL will make a determination, in its sole and absolute discretion, as to the most appropriate response to the RFP. The selection of the successful proposal will be based on a numerical scoring system. All proposals will be assigned a score for each item/category as outlined in the table below. Upon receipt of the proposals and completion of the demonstrations, the Evaluation Team will determine the proposals most qualified based on the following criteria:

Quality of user experience (patron and staff)	
Suitability of solution and ability to meet basic functionality requirements	25%
Affordability of the proposed system over five years	20%
Offeror experience and capability	10%
Service, support, and warranties provided to PGTPL	
Clarity and completeness of the submitted proposal	5%

PGTPL reserves the right to select the Offeror deemed most suitable, which may or may not be the lowest cost Offeror.

This RFP shall not, in any manner, be construed to be an obligation on PGTPL to enter a contract or other purchase agreement or result in any claim for reimbursement of cost for any efforts expended in responding to the RFP or in anticipation of any contract.

2. Description of Requirements

The following requirements are considered critical features that any proposed self-checkout solution must include:

- Integration with Evergreen ILS
- > Integration with other library apps (Communico events calendar, e-resource platforms, etc.)
- > Customizable software design (logos, promotion of programs and services, etc.)
- > Stand alone kiosk models only, no desktop models
- > Alerting feature that clearly notifies staff of any issues encountered by patrons during checkout
- > Ability for staff to access kiosks remotely to assist patrons with any issues that may arise
- > Ability to read digital barcodes
- > Manual account number entry (e.g. touch screen) with alphanumeric functionality
- > Cash, coin, and credit card fine payment
- > Receipt printer
- > Media unlocker
- Option for an ADA compliant kiosk
- > Audio for hearing impaired and adjustable sized fonts
- Support for different languages
- > Surface area for placing library materials and personal items during checkout
- Statistics/reporting module

In addition to the features listed above, PGTPL is interested in a self-checkout solution that includes the following desired features:

- Material return bins
- > Customizable kiosk design (colors, lighting, wraps, etc.)
- > Child-friendly design (integrated step-stool, design, etc.)
- > Upgradeable to support a potential RFID solution

3. Proposal Submission Guidelines

All Proposals should be received no later than 5:00pm EDT on Wednesday, October 6, 2021. Any Proposal received after this date and time will be rejected and not considered.

All proposals must either be emailed to <u>RFPcontact@plainfieldlibrary.net</u>, preferably in PDF format or mailed to:

Plainfield-Guilford Township Public Library 1120 Stafford Road Plainfield, IN 46168 ATTN: Montie Manning, Library Director

PGTPL will not consider any proposal that does not specifically conform to the submission requirements stated in the preceding paragraph.

Responses shall follow the format laid out in Section 4. Proposal Format.

Prior to proposal submissions, Offerors may schedule an Optional Preliminary Meeting between the hours of 9:00am and 4:00pm EDT from Wednesday, September 8, 2021 through Wednesday, September 22, 2021. Meetings shall last no more than one hour.

PGTPL invites Offerors to schedule a preliminary meeting in order to better understand the needs of the library. PGTPL prefers to conduct the preliminary meeting via a web conferencing platform or through a conference call. To schedule a meeting, the Offeror must email <u>RFPcontact@plainfieldlibrary.net</u> no less than three business days in advance of the day they wish to meet.

Proposals should include all necessary information on product dimensions (in standard US units, not metric), hardware, software, shipping, installation, training, purchase, and maintenance and support costs associated with the purchase of the proposed system. Costs must be provided using the provided Cost Worksheets with a breakdown of costs (in dollars, not percentages) as shown in each Cost Worksheet.

Proposals should include the minimum specifications for existing PCs and networking requirements to operate in conjunction with the Offeror's software.

Any costs associated with the preparation and delivery of this proposal will be the sole responsibility of the Offeror.

3.1 Quantities, Appropriation, and Delivery

Unless otherwise stated, quantities listed are estimates only, and PGTPL does not guarantee to purchase the quantities specified. The quantities purchased will be limited to the amount of monies budgeted and appropriated for it. Delivery shall be F.O.B. to the facility where they are to be installed. Deliveries must be made via lift gate and physically delivered into the facility to the intended service point.

3.2 Liability

Any contract for services shall include the following indemnification language. Offerors acknowledge that submitting a proposal indicates their willingness and ability to contract with PGTPL under these terms:

Contractor agrees to indemnify and hold harmless Plainfield-Guilford Township Public Library and its officers, officials, employees and volunteers from and against all claims, damages, losses and expenses including attorney's fees arising out of the performance of the work described herein caused by any negligence, recklessness, or willful misconduct of the Contractor, any subcontractor, anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable.

The parties expressly agree that any payment, attorney's fee, costs or expense PGTPL incurs or makes to or on behalf of an injured employee under PGTPL's self-administered workers' compensation is included as a loss, expense or cost for the purposes of this section, and that this section will survive the expiration or early termination of this Agreement.

3.3 Installation

Offeror shall install the system as specified in the RFP, by manufacturer-trained technicians subject to exceptions made in the response and agreed upon in writing.

3.4 Responses to the RFP

Proposals will only be accepted from a single firm, not from joint ventures. When two or more Offerors desire to submit a single proposal, they shall do so as prime/subcontractor(s). Offerors are invited to visit the library to assist in the preparation of their responses.

Offerors may not use omissions or errors in the Specifications or other contract documents to their advantage. PGTPL reserves the right to issue new instructions correcting any such errors or omissions, which new instructions shall be treated as if originally included.

PGTPL may make any investigation it deems necessary to determine the ability of the Offeror to perform the work. Offerors shall furnish information for this purpose to PGTPL upon request. PGTPL reserves the right to reject any Proposal if the evidence submitted by, or other investigation of, the Offeror fails to satisfy PGTPL that the Offeror has the proper qualifications, experience, equipment, manpower, or financial and managerial capability to carry out the obligations of the contract agreement or to perform the work as specified.

An Offeror may withdraw a bid in writing to PGTPL prior to the deadline for receipt of Proposals.

3.5 Exceptions

If an Offeror's specifications for furnishing products or equipment are in any respect not the equivalent of the requirements in the RFP, this discrepancy must specifically be called out in the Proposal. Notwithstanding anything to the contrary in this RFP, Offerors are invited to propose, and PGTPL will consider, any system that is the functional equivalent, or better, system than called out in this RFP.

3.6 Guarantees and Warranties

All guarantees and warranties should be stated in writing and submitted as part of the proposal. The Offeror shall warrant that the system will meet the reliability and performance requirements set forth in the RFP and will continue to do so as long as the system remains under Offeror maintenance.

3.7 Negotiation

Offerors acknowledge PGTPL's right to reject any and all Proposals and to waive any formality or irregularity in any Proposal received. Offerors recognize PGTPL's right to reject any Proposal which fails to submit the data required by the Proposal documents or is in any way incomplete or irregular. An award to the lowest Offeror is not required.

PGTPL reserves the right to enter into negotiation with one or more Offerors. PGTPL reserves the right to waive any informality as may be permitted by law. PGTPL reserves the right to award multiple contracts for different portions of the work or commodities, or to reject all Proposals.

3.8 Contract Documents

Each Offeror shall examine the Proposal documents carefully. Any interpretation or correction will be issued as an Addendum by PGTPL. Only a written interpretation or correction by Addendum shall be binding. Addenda are written or graphic instruments issued prior to receipt of Proposals which modify or interpret the bidding documents, including specifications, additions, deletions, clarifications or corrections. Prior to receipt of Proposals, PGTPL will send any Addenda to each Offeror in writing.

The successful Proposal will be expected to enter into a contract with PGTPL pursuant to the documents that include the RFP, the Offeror's proposal, the summary of negotiation, and any and all other additional materials submitted by the Offeror. The selected Proposal may be requested to submit copies of their applicable standard contract forms.

The only official answer or position of PGTPL will be the one stated in writing.

3.9 Prices and Purchasing Options

Offerors will also provide a detailed quote sheet using the forms provided in Section 4.8. Prices reflected in the proposal shall include any discounts. Annual maintenance and support costs shall be included showing actual costs of the proposed solution over ten years.

Unit and extended prices must be quoted in U.S. Dollars for each line item specified on the Cost Worksheets.

Unit and extended prices must be quoted in U.S. Dollars for any additional and necessary or recommended components.

Use the Options Cost Worksheet to describe any discounts that would be available if quantities were varied or for any other reason.

In addition to a one-time purchase of equipment, PGTPL is interested in leasing options. Please include all relevant information related to purchasing/leasing options, including terms and conditions, payment schedules, etc. as an attachment to Cost Worksheets in Section 4.8.

No Offeror will be allowed to modify or resubmit its proposal, for any reason whatsoever, after the proposals have been opened. Proposals will not be opened until the specified due date.

4. Proposal Format

Proposals must be structured, presented, and labeled as described in this section.

Failure to follow the specific format, to label the responses correctly, or to address all of the subsections may, at PGTPL's sole discretion, result in the rejection of the Proposal.

All proposal pages should be numbered.

4.1 Cover Letter

The proposal must include a cover letter that provides the following:

- 1. Offeror's legal name and corporate structure;
- 2. Offeror's primary contact to include names, address, phone, and email;
- 3. Identification of any subcontractors and scope of work to be performed by subcontractors;
- 4. Identification of any pending litigation against the Offeror;
- 5. Disclosure of any bankruptcy or insolvency proceedings in the last ten (10) years;
- 6. Statement of the Offeror's credentials to deliver the products and services sought under the RFP;
- 7. Statement indicating the proposal remains valid for at least 180 days;
- 8. Statement that the Offeror or any individual who will perform work for the Offeror is free of any conflict of interest;

- 9. Signature of a company officer empowered to bind the Offeror to the provisions of the RFP and any contract awarded pursuant to it;
- 10. The proposal cover letter should be concise and brief and not exceed two (2) pages.

4.2 Table of Contents

All pages are to be numbered and figures, tables, charts, etc. must be assigned index numbers and identified in the Table of Contents.

4.3 Executive Summary

Provide a brief and concise synopsis of the proposal and a description of the Offeror's credentials to deliver the services sought after under this RFP.

4.4 Description of the Proposed Solution

Describe the products and systems which comprise the proposed solution. Please include:

- 1. Sample images of the kiosk design, patron interface, and staff interface;
- 2. Measurements of kiosk units in standard units, not metric
- 3. Description of accessibility features and ADA compliant design;
- 4. Description of customizable components and integrations with other software;

4.5 References

The Offeror must supply three references for similar self-checkout installations within the past five years, preferably within a comparable library (ILS, services area, location, etc.)

Provide the name of the library, contact names, email information, and telephone number; include a brief description of the products provided and the year of the installation.

4.6 Project Implementation

4.6.1 Project Implementation Plan and Schedule

PGTPL will soon begin a construction project to repair a partial ceiling collapse in the main area of the library. We estimate work on this project will begin mid-October 2021 and last into January 2022. This is subject to change due to factors beyond the library's control such as materials procurement. Ideally, PGTPL wants the installation of the self-checkout kiosks to take place after the construction project is completed.

Please provide an overview of the implementation process. Include a timeline for implementation assuming a contract is signed on November 17, 2021 with estimated dates for delivery, installation, configuration and testing, staff training, and completion.

4.6.2 Training and Documentation

Offeror will supply adequate training free of charge to PGTPL as part of the implementation process. Adequate training is defined by the following:

- 1. Training all staff in the use of all equipment. The total number of staff to be trained is approximately 45;
- 2. Training key staff in the use of statistical reporting modules. The total number of key staff to be trained is approximately 15;

3. Training will be performed by the Offeror and will take place at the library with appropriate safety measures in place relative to the current pandemic.

Additional training requirements include:

- PGTPL requires user manuals, plus any other materials that are typically distributed during training sessions;
- PGTPL requires that manuals be available in electronic format with unlimited distribution within the library and shall be provided free of charge;
- > PGTPL requires unlimited interaction with the Offeror sales and technical support staff during installation planning, the installation phase, and follow-up immediately after such installation.

4.7 Service, Support, and Warranties

4.7.1 Proposed Support and Maintenance Program

PGTPL wishes to ensure that the system is fully functional for five years or more. Provide details of the recommended service and support program to achieve this objective.

Provide a sample support and maintenance agreement for the proposed support and maintenance program with the corresponding Cost Worksheet.

4.7.2 Support Options

Describe the company's support operation including:

- 1. Normal operating hours for tech support;
- 2. Procedures for obtaining assistance during off hours;
- 3. Any subcontractors that will provide services;
- 4. Guaranteed response times for both remote and on-site support;
- 5. Locations of support technicians;
- 6. Turnaround time guaranteed by Offeror to acquire and install replacement parts;
- 7. Qualifications of key support team personnel

4.7.3 Software Maintenance

Describe your software update and upgrade policy and how updates are applied. Specifically, provide:

- 1. How often software updates are provided
- 2. How software updates are applied and by whom
- 3. If the Offeror applies updates, describe the requirements for accessing PGTPL's system

PGTPL requires that all software updates be pre-approved by PGTPL before they are installed and requires that the Offeror be responsible for testing all operating system updates before applying them. State your willingness to comply with both of these requests.

4.7.4 Guarantees and Warranties

Provide details of all guarantees and warranties that accompany your proposed solution. Requirements include:

- 1. **Warranty of Equipment:** The Offeror must provide an all-inclusive, 12-month extended warranty on equipment, software, and components and offer a maintenance/service contract thereafter. All proposed maintenance/service contracts are subject to negotiation by PGTPL. Warranty and service requirements apply to both standard and optional system components;
- 2. **Software Warranty:** Software patches and upgrades are supplied free of charge to PGTPL and are performed by the Offeror's trained technicians. Describe how often patches and upgrades are applied and how they are scheduled with the library;
- 3. **On-Site Support Response Guarantee:** Service technicians should be readily available and be fully trained, factory authorized, and certified by the manufacturer to perform service on any related hardware or software. Describe guaranteed on-site support response time;
- 4. **Spare Parts:** Describe commonly stocked spare items and where the parts likely needed for PGTPL will be located;
- 5. **Extended Support:** The service agreement must be renewable on an annual basis. Describe availability of extended support contracts and the annual cost of each option.

4.8 Cost Worksheets

4.8.1 Equipment and Licensing

Required Components	Quantity	Offeror Description/ Model Number (Units)	Price Per Unit (US\$)	Extended Price (US\$)
Self-checkout kiosks with credit card reader, cash/coin acceptors, media unlockers, receipt printer	6			
Software license *Please list quantities, and whether licensed by site or kiosk.				
TOTAL INITIAL EQUIPMENT & LICENSING COST				

4.8.2 Five Year Cost Worksheet

Equipment & Services	Price Per Unit (US\$)	Extended Price (US\$)
Total initial equipment & licensing (see above)		
Installation & Configuration		
Shipping/Freight		
Training		
Maintenance & Support (if not included)		
Tax (PGTPL is sales tax exempt)		
TOTAL YEAR ONE COSTS (EQUIPMENT AND SERVICES)		
Annual Costs	Price Per Unit (US\$)	Extended Price (US\$)
Include a Hardware and Software Maintenance and Support plan including sufficient Preventative Maintenance visits to ensure the system remains in good working order for 5 years.		
Attach a sample of the Maintenance and Support Plan corresponding to this Cost Proposal.		
Annual Maintenance Cost Year 2		
Annual Maintenance Cost Year 3		
Annual Maintenance Cost Year 4		
Annual Maintenance Cost Year 5		
TOTAL COST OVER FIVE YEARS:		\$

4.8.3 Optional Components

OPTIONAL Components	Quantity	Offeror Description/ Model Number (Units)	Price Per Unit (US\$)	Extended Price (US\$)
ADA compliant kiosk *If price differs from standard design	6			
Other optional features: add more lines if needed				

OPTIONAL SITE VISIT: Representative that attended:

DECLARATION:

The undersigned hereby declares the bid specifications have been carefully examined and this proposal is submitted in compliance therewith. The undersigned understands that competence and responsibility, time of completion, as well as other factors of interest to PGTPL may be a consideration in making the award. PGTPL reserves the right to reject any and all proposals, to accept or reject alternate proposals and unit prices, and waive technicalities concerning the bid proposals received as it may be in the PGTPL's best interest to do so.

AUTHORIZED REPRESENTATIVE:

Authorized Representative's Name	Title
Authorized Representative's Signature	Date
Company	Telephone
Street Address	E-Mail
City/State/Zip	Fax