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Pricing Proposal – must be submitted in separate envelope

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## Statement of Purpose

This Request for Proposal, issued by Pollard Memorial Library, is for the supply and installation of a Radio Frequency Identification (RFID) system, which shall work in conjunction with the Library's existing Integrated Library System (ILS), Evergreen.

Among other benefits, the proposed RFID system should provide significant productivity gains through reduction in key labor-intensive workflow processes, enhanced customer service, reduced material losses, reduced incidents of staff repetitive motion injuries, and improved inventory accuracy. The RFID system must be optimized for use in a library environment, be efficient in its design through the elimination of redundant features, and be expandable.

## Critical Requirements

The Library is seeking a turnkey RFID solution that will include tags, hardware, software, installation, project management, staff training, and on-going support and maintenance. Vendors must be able to demonstrate a proven ability to provide and implement the following:

- Real-time integration with the Library's ILS; (Evergreen);
- Durable, ISO compliant RFID tags that easily affix to the item, regardless of its medium;
- Portable tagging solution for loan, lease, or purchase;
- Self-checkout solution that integrates with the library's existing furniture and if appropriate with existing staff stations. The library also desires the ability to collect fees and fines without staff intervention.
- Multiple security options for audio-visual materials;
- RFID conversion for the Library's existing staff circulation stations or the provision of new hardware;
- Shelf-reading and inventory tools that can accommodate any collection size with ease;
- ADA-compliant, Library-customizable security pedestals;
- Comprehensive reporting capabilities;
- If appropriate, detection systems and self check out solution must be UL Listed.
- A willingness to work with library staff throughout the project to ensure a highly functional and esthetically pleasing solution that will result in a high percentage of successful self-service transactions.

## Background

The Pollard Memorial Library is located in Lowell, MA. The population is 110,000 and the Library is a very active place in the community.

- Annual circulation is over 194,000 items per year.
- The library's growing collection consists of nearly 185,000 print materials and an AV collection containing nearly 11,000 DVDs, 8,300 CDs and Audiobook on CD and MP3, and 159 audiobooks on tape.
- The library uses the Evergreen Integrated Library System (ILS).
- Pollard Library currently uses the Checkpoint security system.

New equipment as part of the change to RFID will contain any necessary self-checkout equipment; antenna/readers; and security gates w/people counter and stolen-item reporting. Conversion stations will be (leased).

## Scope of Work

**The Library's Mission:** The Pollard Memorial Library is a vibrant community hub and Lowell's gateway to knowledge, meeting the information needs and enriching the quality of life in our community. The mission of the library is to provide diverse collections, state of the art technology, appealing programs and services to Lowell's diverse population in a safe and welcoming environment.

The library's overall goal is to provide the above services with competence, professionalism, and courtesy. The goal of the library's RFID implementation is to more fully satisfy the needs of patrons in accordance with its general mission and goal by accomplishing the following:

- Reduce the amount of staff time spent on routine mechanical tasks such as charging and discharging materials individually in order to provide excellent personal service even as library usage continues to rise;
- Provide avenues for checking out materials in the form of self-check options in order to reduce wait time for service at the Circulation desk.
- Improve the level of control over stacks maintenance responsibilities by replacing fully manual efforts with RFID-enabled inventory, real-time and report-based item searching (claims returned, missing items, etc.), and shelf-reading functions. The Pollard Memorial Library expects to be able to complete a full inventory of all items in its collections on a biannual basis using RFID-enabled inventory tools.

To reduce the amount of time that will be needed to retrofit the Library's entire collection of approximately 203,600 items, the Library would also like a quote from the vendor to retrofit the entire collection. It should include labor, project management, travel, on-site expenses and supervision.

The Library wishes to acquire the following system components.

PRODUCTS	QUANTITY
RFID Book Tags	_188,300_____
RFID DVD Tags	_20,000_____
Conversion Station – lease	X @ X weeks
Staff Workstation Equipment	11
Software Licensing	As needed
Self-Checkout Equipment	2
Fines & Fees Functionality – credit/debit	2
Fines & Fees Functionality – cash/credit	2
Detection System – [2 aisles]	3
Portable Inventory Handheld Reader	3

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Proposals should include all necessary information on hardware, software, shipping, installation, training, and on-going maintenance associated with the purchase of an RFID system. Proposals should include the minimum specifications for existing PCs and the Local Area Network (LAN) to operate in conjunction with the vendor's software. Unless otherwise indicated, quantities specified are guideline only and are not guaranteed for purchase by the Library.

## Vendor Criteria

Vendor selection will be based on the following criteria:

Relationship and ability to interface with the library's ILS	
Vendor reputation, experience, and qualifications in the library RFID field	
Response of vendor's references for similar projects	
Design, functionality, and suitability of the proposed solution	
Suitability of on-site and remote service and support provided to the Library	
Clarity and completeness of the submitted proposal, and adherence to the specifications	
Ability to deliver requested products in accordance with the Library's timeline	
Affordability of the proposed system with clearly defined annual costs	

**Proposal shall follow the sections outlined below**, beginning with a cover letter which will indicate the appropriate contact person for any potential correspondence, and include detailed vendor information, comprehensive system description, project implementation, references, system requirements, training and documentation, support and maintenance, guarantees and warranties, and system/component pricing.

### 1. Vendor Experience & Capability

The vendor shall provide information on its experience and qualifications, which enable it to provide a suitable solution for the Library, including, but not limited to, history of the company, timeline of incorporation, experience installing the products and services requested in this RFP, financial viability of vendor and any other information regarding the vendor's experience, which will assist the Library in evaluating the proposal and making an ultimate decision.

### 2. References

The vendor must supply three (3) references for similar work it has undertaken over the past three (3) years, preferably within a library using the Evergreen ILS.

Please provide:

- Library name;

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- Contact name(s);
  - Email address;
  - Telephone number;
  - Brief description of the work performed, including products provided.

### **3. Description of Proposed Solution**

The Vendor shall fully describe and illustrate the products and systems which comprise its RFID solution. Description to include:

- How its RFID offerings will benefit the Library in the areas of staff circulation, self-checkout and check-in, automated materials handling, inventory management, and item security.
- How vendor will assist the Library in its transition to RFID technology;
- How vendor will offer on-going support and maintenance and ensure Library staff acceptance of new technology through effective, hands-on training.

### **4. Project Implementation**

The vendor shall provide an example of a comprehensive project implementation plan. This plan should include:

- Project management and technical support personnel, with a brief description of each person's qualifications and experience;
- Project implementation timeline for each major part of the implementation, such as tagging or installation;
- Details of any materials that the Library will be expected to provide which are outside the provisions of the vendor's proposal;
- Information on training materials, topics covered, training approach, and training schedule.

### **5. Project Support & Maintenance**

The vendor shall provide details on its service and support and continued maintenance over the life of the system. Details should include:

- Hours and methods of contact to technical support;
- First year costs, if any, and subsequent years costs;
- How vendor handles/addresses issues;
- Any sub-contractors with which the vendor works;
- Any warranties and/or guarantees for the system and/or support and service;
- Response times;
- Qualifications of key support team personnel;
- Sample sales, software, and support agreements as appropriate.

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## 6. System Specifications

The following sections list key components and features necessary for efficiently achieving the functionality required. Responding vendors should indicate the following and/or provide details where requested.

<b>Yes:</b>	The system meets this specification.
<b>No:</b>	The system does not meet this specification. If there is an alternate functionality, please explain.
<b>Development:</b>	This functionality is under development. Indicate when it will be available as a generally released product.
<b>Planned:</b>	The system partially meets this functionality. Please explain the differences and exceptions.
<b>Future:</b>	This functionality is planned for the future. Indicate when it will be under development and available as a generally released product. Please also elaborate whether the Library will incur any additional costs for the product or service once it becomes available, either as a direct cost or because the product or service will serve as a replacement or addition.

Any exception to the specifications must be stated. Vendors are advised that the Library is interested in receiving proposals that discuss a proven RFID system. Proposals for systems in an Alpha or Beta phase of development will not be considered.

### Overall System:

1. Where appropriate, system components must be UL and FCC Part 15-Certified; SIP2, RS-232, TCP/IP Ethernet 10/100 and 802.11b (wireless) compliant.
2. The proposed system must integrate to the Evergreen ILS. Explain how it integrates.
3. Preference will be given to a system based on how efficiently it communicates to the ILS. Either directly or via the SIP server or both will be acceptable assuming it is a proven solution.
4. System must comply with ADA guideline 4.15.4 for wheelchair clearance and ADA guideline 4.34.3 for reach range standards.
5. Detection and security equipment (including gates) must be in compliance with relevant ADA requirements.
6. The proposed system must provide a complete solution that utilizes RFID hardware and software (RFID tags, detection systems, staff station readers, patron self-checkout stations, inventory wand, and optional book return system), and any other RFID-related hardware into the system. Please describe.

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7. The proposed system must interface with the Library's existing automated library system using appropriate SIP 2, NCIP or BIC Library Communications Framework (BLCF) protocol. Please describe.
  8. The proposed system must be able to connect through the Library's Ethernet network via an RJ-45 connector and/or secured wireless network.
  9. Vendor offers comprehensive messaging, monitoring, and management solution that allows staff to monitor and react to activity at self-checkout stations, security gates, sorting systems, etc. Describe.

### **RFID Tags:**

1. Tags must be guaranteed for the life of the items to which they are applied. Provide documentation and any appropriate test data.
2. Vendor will name its tag vendor and quality assurance guarantees.
3. The proposed system must provide tags that communicate at 13.56 MHz.
4. The proposed system must provide tags with a minimum 1k bits of memory.
5. Tags must be ISO 15693 compliant.
6. All data on the re-writable RFID tag, including the item identifier field, must be fully rewriteable.
7. The proposed system must allow the option to lock and unlock item barcode number.
8. The proposed system tags must enable the security status to be stored directly on the tag and must trigger an immediate alarm if an item not charged is read by the detection systems.
9. RFID tag must have portions of memory that can be locked (for item number) and portions that can be re-programmed (branch and/or shelving location code). Each memory portion must be able to be locked independently of other portions or not be locked at all.
10. The proposed system must offer tags in plain white or pre-printed to library specifications.
11. Vendor provides recommendations and instructions for tagging media and multi-part sets. Provide recommendations for how best to secure items with media (e.g. CDs, DVDs) and multi-part sets (e.g. Books on CD, TV series DVDs) in a way that is the least time consuming for staff while providing required security.
12. The proposed system tags must provide both security and inventory control functionality.

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13. The proposed system tags must use an anti-collision algorithm that does not limit the number of tags which can be simultaneously identified and read.
  14. The proposed system tags must be adhesive-backed and one piece (tag and label integrated into one piece) to adhere to library materials without addition of an adhesive cover label.
  15. The proposed system tags must use a low acid, or neutral pH, non-contact (delayed set time) adhesive.
  16. The proposed system tag must be guaranteed for the life of the item to which it is originally affixed. Provider agrees to replace, at no cost to the library, all tags that fail or which cease to be readable at 99% accuracy by security system.
  17. Tags are performance-tested before shipment and defective tags are marked. Performance test results average less than 1 defective tag per 10,000. Proposals must include a detailed description of procedures for reliability testing and statistics on average number of defective tags per 10,000.
  18. Vendor tags protect patron privacy. Proposers must describe what information is stored on each tag, the encryption system used, and how data is prevented from being read by unauthorized readers.
  19. The proposed system shall be fully compliant with ISO 18000-3 Mode 1, and include both mandatory and optional commands specified in ISO 15693-3. It will also adhere to the ISO 28560-2 standard for North American libraries.
  20. Please provide samples of recommended tags.

**Conversion Station:**

1. The proposed system must be self-contained, battery operated and designed to be placed on a compact cart with wheels for easy conversion in the narrow library aisles.
2. Conversion of an existing collection must require no more than a computer, barcode scanner, and RFID reader/antenna in addition to software, all of which can be placed on mobile cart, so that the complete operation can be performed in the stacks.
3. Mobile conversion station can't be limited to battery only.
4. The proposed system must function in standalone mode, not requiring an interface with the integrated library system.
5. Vendor will describe its tagging software and the process.

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6. The proposed system must be easy to use and provide a fast per-hour/per-person conversion rate. Please provide an example of successful library conversions with contact information.
  7. It must be possible to configure systems so that during the tagging process, system must automatically interrupt if bar code scanner if it fails to scan all digits in the bar code.
  8. The tagging station should perform an immediate confirmation read of a programmed tag to ensure that the tag has been written exactly as intended.
  9. Tag programming application must be able to perform a confirmation read of tags in one-at-a-time or multiple mode, so the staff can see all data programmed onto tags.
  10. The proposed system must have a visible scan area to facilitate correct placement of material on the conversion station.
  11. When tag programming errors occur, the system must react in real-time using sound and visual alerts.
  12. The proposed system must be able to handle varying bar code locations and orientations.
  13. Please provide picture(s) of proposed hardware and any additional information that makes your solution desirable.

#### **Circulation Staff Workstations:**

1. Staff equipment must be designed ergonomically. The supplier must utilize an RFID pad with a tapered design to allow for ease of sliding media off and on the pad in order to minimize the need for staff to pick up the materials which will help reduce repetitive motions.
2. To ensure the library has installation options that best meet its needs, the proposed hardware should consist of antennas that provide side-shielding, full shielding, and extra-large antennas with full shielding.
3. The proposed system has a reader pad that measures no more than 1.5" thick, and is easily installed into existing furniture. The library will provide a PC, barcode scanner, and receipt printer for each staff workstation. All other equipment and software needed to enable RFID-based circulation transactions must be provided.
4. Staff workstation equipment is compatible with the library's standard circulation desk computers, barcode scanners, and receipt printers.

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5. Staff workstation equipment can be mounted in, on, or under the work surface of a circulation station.
  6. Staff workstation equipment can function when positioned under existing library wood, laminate-topped desks, or solid surface counters.
  7. Staff workstation equipment has an RFID read range of 8 inches maximum above existing work surface for book tags.
  8. The proposed system readers must be able to read tags and display the information thereon.
  9. The proposed system must be able to be used for charge and check-in of library materials.
  10. Staff can use the same screen to which they are accustomed.
  11. Describe network connections options.
  12. The library's standard ILS checkout and check-in screens must remain open and fully operational at all times, while still receiving valuable updates/notifications about patron transactions at self-checkout stations.
  13. The proposed system must secure item within one second of discharging the item.
  14. The proposed system must simultaneously process multiple RFID-tagged items for check-in/out.
  15. The proposed system must provide a displayed count of the number of items processed simultaneously to ensure complete check-in/out transaction processing.
  16. The proposed system must have the ability to read, program, and reprogram RFID tags.
  17. The proposed system must not require mouse activations to process most items (Exceptions made for configuration changes, error handling, or tag reprogramming situations).
  18. RFID client software must be capable of running in Windows 7 at a non-administrative level.
  19. The RFID staff application client interface must not be intrusive to the ILS staff client. It must take only a small amount of screen real estate and remain easily accessible in a small application window.
  20. The staff application must work with all types of ILS clients: Windows-based, Java-based, web-based, etc.

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21. System must provide an option that would allow library staff to utilize an application that is modeled on the patron self-checkout application. The system should be optimized for staff use.
  22. Staff workstation equipment is capable of processing RFID tags or barcodes in the same circulation transaction. Provide a detailed staff scenario of a checkout session that includes some items that are RFID tagged and others that are only barcoded.
  23. The proposed system uses an anti-collision algorithm that does not limit the number of tags which can be simultaneously identified.
  24. The proposed system must allow configuration of item identifier parameters to automatically prevent programming of partially scanned or incorrectly scanned items. System will provide adjustable audio alerts to signal an incorrect or incomplete scan.
  25. All staff equipment provides clean and efficient cable management options.
  26. Provider provides a list of staff station equipment recommended, including unit pricing for each different product.
  27. Please provide picture(s) of proposed hardware.

**Self-Checkout Stations:**

1. If appropriate, all system components must be UL and FCC Part 15-Certified; SIP2, RS-232, TCP/IP Ethernet 10/100 and 802.11b (wireless) compliant.
2. The proposed system must integrate with the Evergreen ILS. Explain how it integrates.
3. If the vendor has a “combination station” option where a staff member can access the same screen that the patron is using so they can assist the patron with a checkout, please describe how it works and the equipment involved.
4. The proposed system must provide application-specific software for the patron self-checkout stations. Please describe.
5. As needed, the proposed system must interface with the Library’s existing automated library system using the SIP2, NCIP or BIC Library Communications Framework (BLCF) protocol. Please describe.
6. The proposed system must be able to connect through the Library’s Ethernet network via an RJ-45 connector and/or secured wireless network.
7. Vendor must be willing to work with the Library’s Technical Services and Automation Department to resolve any RFID-ILS functionality problem.
8. Describe how your solution monitors activity at self-checkout stations.

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9. The proposed system's RFID self-checkout units must be able to read item-specific identification numbers, communicate to the host circulation system to update the Library's inventory, and turn security off.
  10. The proposed system must be dual function – capable of processing RFID tags or item bar codes in the same transaction.
  11. The proposed system must read the type of cards currently in the library, which are codebar.
  12. Describe available Self-Checkout options, including build-in, freestanding, countertop, and height adjustable for ADA requirements. *Please provide images of the proposed units.*
  13. The proposed self-checkout stations must provide the option of media security case unlocking, including One-Time and Kwik Case.
  14. Release station can check out multiple items in a stack and not just one at a time.
  15. The proposed system must have the ability to print out all information for a patron transaction on a single receipt. Such receipt should be customizable to incorporate library identity, hours, transaction type, items loaned/renewed, and fees (if any) that have been paid and/or are outstanding.
  16. Self check out solution must have a patron assist option. Describe
  17. Describe how self-checkout transactions are monitored by staff.
  18. Patrons can renew items at the self-checkout stations without having the items in hand.
  19. The proposed system must simultaneously process multiple RFID-tagged items.
  20. The proposed system must be capable of reading item barcodes located in various locations.
  21. The proposed system's self-checkout solution should have customizable messages based on patron and item status.
  22. The proposed system must display ILS system information relating to the patron or item status.
  23. Option must be available to enter patron PINs on the touch screen in addition to scanning library cards.
  24. Self-checkout system software and hardware must meet ADA guidelines, and includes features, such as a large touch screen interface, and large type size.

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25. The proposed system must have customizable instructions that can be configured by library staff. This will include multiple style options, logo and wording without altering HTML code.
  26. Self Checkout solution must not allow patrons to checkout items that are blocked by the library's ILS.
  27. The solution can easily handle multiple item check-outs without having to select the number of items on the reader. Self-checkout software will confirm the number of items being checked out before the transaction has been completed.
  28. The proposed system must be capable of multiple language options on self-checkout screen to include banners, instructions, and messages. It must be possible for the library to add new languages should the need arise in the future.
  29. Station must have option to print no receipt, or have the receipt emailed.
  30. A "running receipt" must be available on screen indicating which items have been successfully checked out and which items patron has unsuccessfully attempted to check out.
  31. The proposed system must have the ability to perform offline transactions and maintain records of all barcodes checked out when the ILS is offline, and then upload transactions when the ILS is back online.
  32. The proposed system must use a color-code to indicate which items have turned off the security feature on RFID tags and the item has been checked out.
  33. Describe network connection options.
  34. Describe available reporting features and the statistics that can be accessed by staff.
  35. Describe how staff is able to monitor the status of self-checkout stations and provide service to patrons.
  36. Staff must be able to configure individual or multiple self-checkout stations within a site or system-wide.
  37. Staff must be able to run and view diagnostic logs for each self-checkout station to ensure they are operating properly by logging in to a web interface on any staff station.
  38. Describe options for paying fines and fees at the self-checkout stations. What type of hardware/software is offered\_ Please describe the process for paying any fines at the self-checkout station.
  39. Please describe how the self check can enable scanning of bar-codes on mobile phones through popular applications(apps) like CardStar.
  40. Please provide picture(s) of proposed hardware.

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### **Detection System:**

1. Security gate must be configured as a two aisle, three pedestal system with at least 36" per aisle.
2. Security system supports standard TCP/IP network connectivity.
3. The proposed system must have a read range of no less than eighteen inches (18") in either direction of each gate.
4. The proposed system must use 13.56 MHz ISO 15693-3/ISO 18000-3 mode 1 RFID technology.
5. Vendor will identify in their bid any architectural issues (e.g. proximity to metal and electronics) that may affect the gate efficiency.
6. Security pedestals must not damage or erase magnetic material.
7. The proposed detection system must include a patron counter which can be reset by library staff. Detection system must have an on board patron counte.
8. Pedestals must have the option to remotely access patron counter stats and reset to zero via an Ethernet connection to the library's network.
9. Security pedestals should perform bi-directional patron counting. Security system must have the option to only alarm upon exit. Visual alarm should have multiple color options.
10. The proposed system must be able to issue visible and audible warnings.
11. The proposed system must provide software alerts for staff indicating as to the reasons gates are alarming, including title of item(s) and whether or not it was properly checked out.
12. The proposed system gate software must provide comprehensive reporting tools. Please describe.
13. Vendor supplies accompanying software with gates that allows the Library to monitor foot traffic, be alerted to security issues, and verify whether items have been checked out properly or not.
14. Security system's false alarms do not exceed 1 per 1000 when 25 items are carried out by a customer in one stack.
15. Vendor's security system includes clean and efficient cable management provisions.

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16. System is easy to turn off or disable, and when the unit is off (or disabled), it is not obvious to patrons that this is the case.
  17. Please provide picture(s) of proposed hardware.

**Portable Handheld Reader:**

1. Vendor provides an ergonomically designed wireless inventory device which aids the user in reading shelves at all levels, is easy to use, and is relatively non-stressful to wrist, arm, shoulder and elbow.
2. The proposed solution must be a easy to use and allow staff to easily reach the top and botton shelves. Describe.
3. The proposed portable handheld reader must accommodate data collection to collect and store identifiers of items scanned as well as communicate to the ILS in real-time via SIP.
4. The proposed system must allow the security status of items in the library to be changed to “off” or “on” to accommodate items not properly checked in or out.
5. Vendors who have a handheld wireless circulation device which allows staff to charge and discharge material independent of a traditional or self-check workstation should quote the cost of such device as an optional addition to the bid. Proposer should also provide details of that device’s functionality, limitations, price, and ergonomic facility.
6. Vendor offers an inventory device and/or handheld reader which have been successfully used by other Evergreen ILS-based libraries to locate lost items or items marked missing on the shelves. Proposals must include an explanation of how inventory and missing items are located.
7. Weight must be specified for any handheld device recommended by proposer.
8. Give an overall explanation of how the portable inventory device works.
9. Please provide picture(s) of proposed hardware.

**7. Training & Documentation**

Vendor will supply adequate training to the Library as part of the implementation process. Please provide a list of proposed training materials and state whether the training will be on-site, via web conference, or by some other means.

Vendor must list all product documentation that will be provided to the Library. Please state whether this is as hard copy and/or downloadable and how often it is updated. Include pricing for additional training – both on-site and remotely – as part of the Cost Proposal.

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## 8. Support & Maintenance

Vendor shall supply detailed information on its Support and Maintenance policy for its RFID system. Information should include:

- Telephone support options and hours of operation;
- Methods of logging support requests;
- Guaranteed response times for both remote and on-site support;
- System update and upgrade policy;
- Turnaround time required by vendor to acquire replacement parts;
- A sample Support and Maintenance Agreement;
- A sample Service Level Agreement.

## 9. Guarantees & Warranties

Vendor shall provide details of all guarantees and warranties that accompany its solution. At a minimum, these must include a warranty that the solution will meet or exceed any performance and reliability standards included in its response to this RFP for the entire period that it is being maintained by the vendor.

### Proposal Terms

A proposal will be accepted only upon execution of a contract. A vendor whose offer has not been rejected may be required to demonstrate its proposed solution at the Library free of charge. The Library further reserves the right to enter into negotiations with one or more vendors as it deems necessary. The Pollard Memorial Library also reserves the right not to base award of contract solely on price.

Vendor agrees to indemnify and hold harmless the Library from and against legal liability for all claims, losses, damages, and expenses to the extent such claims, losses, damages, or expenses are caused by Vendor's conduct, acts, errors, or omissions. Library agrees to indemnify and hold harmless Vendor from and against legal liability for all claims, losses, damages, and expenses to the extent such claims, losses, damages, or expenses are caused by the Library's conduct, acts, errors, or omissions. In the event such claims, losses, damages, or expenses are caused by the joint or concurrent conduct, acts, errors, or omissions of Vendor and the Library, they shall be borne by each party in proportion to its own conduct, acts, errors, or omissions.

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he Pollard Memorial Library will keep confidential any proprietary information as requested by the vendor in the proposal (as allowed by Massachusetts General Law); any confidentiality claims must be noted in the submission.

By submitting a proposal, the vendor agrees with the terms herein stated.

The below criteria, bidder must respond yes or no

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- System uses industry standard RFID hardware.
  - Vendor demonstrates an ability to read tags programmed with multiple tag formats, including those of competitors' products, to allow for maximum interoperability. Provide examples.
  - System must interface with the library's ILS SIP2 interface and not use a proprietary connection. Vendor must guarantee this compatibility.
  - The proposed RFID system comes standard with application-specific software.
  - System is FCC Part 15 certified and ADA-Compliant.
  - Support and maintenance of RFID software and hardware is not contingent on the purchase of RFID tags from the vendor providing the software and hardware.
  - Vendor's tags can easily work with other systems. Provide documentation.
  - Tags have a read/write design, operate at 13.56 MHz, and are compliant with ISO 18000-3, NXP 15693, and NISO 28560 recommendations for library RFID.
  - RFID tags feature both AFI and electronic article surveillance (EAS) security, which is turned off automatically during checkout and turned on automatically and simultaneously during check-in.
  - Item identification stored on the tag (bar code number) must allow full alphanumeric character set, so that numeric and non-numeric item identification numbers can be represented.
  - RFID tags available to fit all standard types of library materials: books, magazines, CD/DVDs, audio books, video tapes, etc.
  - Book tags do not exceed 2¼" in width or length.
  - Tag must have memory capable of holding additional information including item type and multi-part set identifier.
  - The anti-collision algorithm will not limit the number of tags that can be simultaneously identified and read.
  - Vendor offers multiple CD/DVD tag options to include small "hub" tags and full overlay tags.
  - Tags tested for over 100,000 read/write cycles and be guaranteed for the life of the items to which they are applied.
  - Tagging station must be capable of programming tags by placing a tagged item on the station's antenna and then scanning the item's bar code. No additional steps must be required.

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- RFID reader must be designed to prevent the reading and writing of items outside of the prescribed field.
  - Conversion of an existing collection requires no more than a computer, barcode scanner, and RFID reader in addition to software, all of which can be placed on mobile cart, so that the complete operation can be performed in the stacks.
  - During the tagging process, the station must be capable of programming just the existing barcode or item type, multi-part set identifier, and shelving location information (according to library defined criteria) into the tag.
  - During tagging process, system must automatically interrupt if bar code scanner fails to scan all digits in the bar code.
  - The tagging station should perform an immediate confirmation RFID read of a programmed tag to ensure that the tag has been written exactly as intended.
  - When tag-programming errors occur, the system reacts in real time using sound and visual alerts.
  - When optional on-tag programming features are available, the system must be able to turn each feature on or off, so the user only works with the data selected by the library.
  - Tagging process must not require an interface with library's database.
  - Staff station must be capable of checking library materials in and out without need for SIP or SIP2 communication with the Library's database.
  - The library's standard ILS checkout screens should remain open and fully operational at all times, while still receiving valuable updates/notifications about patron transactions at self-checkout stations.
  - The system must be able to turn RFID security on and off as appropriate during ILS check-in and checkout activities.
  - The station must be able to perform check-in/checkout using the ILS or vendor and uses a single mouse click or keystroke to switch between modes.
  - The staff application works with all types of ILS clients: Windows-based, Java-based, web-based, etc. without using SIP, SIP2, or NCIP.
  - If the ILS is capable, the staff check-in and checkout process items one at a time or simultaneously for multiple items in a stack. ILS messages must be properly handled when processing multiple items.

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- Station provides visual and audio indication whenever the tag's security has been turned on or off.
  - Station must be capable of turning the tag's security on or off independently of any other function.
  - A bar code reader must be able to operate concurrently with an RFID reader
  - The RFID antenna must prevent the reading and writing of items outside of the prescribed field? How does the system prevent programming of mis-scanned bar codes on items?
  - Staff stations can be mounted under a designated surface for a more streamlined look if desired. Describe how RFID equipment is integrated, including standard equipment, options, and limits of positioning, size, weight, and connections to PC.
  - System does not require a separate staff application that is modeled on the patron self-checkout application. The system should be optimized for staff use.
  - System allows staff to easily select between security settings, such as turning security on, turning it off, ignoring it altogether, and automatically turning security on or off.
  - Vendor can supply RFID antenna, RFID reader, RFID software, data connections needed to fully operate with library's already existing PC, scanners
  - The self-checkout application is intuitive and provides step-by-step audible and visual instructions that walk a patron through the checkout process.
  - Self-checkout units must integrate with the ILS at the Library using the SIP2 interface.
  - The system provides configurable audio, graphics, and text for each step (not just one graphic for the entire session).
  - The server can push configuration changes to all clients.
  - The system displays select information about the patron discreetly, including number of items checked out, number of items on hold, and/or any fines associated with the account.
  - Station must block both patrons and items that are blocked by the library's ILS.
  - Station must be able to perform checkout functions and deactivate RFID tag's security bit in just one process, even if multiple items are placed on the antenna.
  - After checkout is complete, the patron must have an option of printing, emailing or of having no date-due/checkout receipts
  - Station allows for placement of library items in any orientation. The user must be able to handle items of all types in exactly the same way.

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- Stations meet ADA provisions for height and reach. Text and audio are available to provide access for visually or hearing impaired patrons.
  - System must be able to indicate on the patron's receipt all items that were checked out along with the date and time.
  - Station must be able to handle items comprised of magnetic media without risk of damage or erasure.
  - Station doesn't limit the number of tags that can be read and be able to process one item at a time or, with the exception of CDs and DVDs, a multiple item stack of up to 8" high.
  - Station must be able to scan barcode or RFID-based patron cards. If scanning barcodes, the reader will be a linear scanner that will read Codabar bar codes on existing patron cards and multi-length bar codes
  - Option must be available to enter patron PINs on the touch screen in addition to scanning library cards.
  - Station has option to print no receipt, or a comprehensive receipt showing each item. Receipt must be customizable by the Library and show patron name, number, both, or neither in addition to items checked out.
  - Station must have direct interaction with the ILS through SIP2 without the need to maintain a separate database.
  - System must have options on how to react when host communications have been interrupted and restored. The system will automatically try to connect to the SIP2 host until it is available. Additionally, the library must have the option to manually reconnect to the host when communications have been unavailable.
  - Each self-checkout station will have its own configuration settings stored on the server and not locally on the self-checkout PC.
  - Station has the ability to provide multiple language selections.
  - A list of all items on the screen showing which items have been successfully checked out which must match the printed receipt.
  - Patron messages can be configurable for multiple languages.
  - On-screen text fields have configurable fonts and font sizes.

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- System has the capability to repress scanner feedback sounds when duplicate or non-accepted scans occur. The scanner alert sound should only play when a scan is accepted by the system.
  - Station has the option to be built into or sit on top of the library's existing casework.
  - Station designed so that all hardware components are easily accessible and replaceable by library staff.
  - System must have the ability to gather basic statistics about transactions and easily print a summary of these statistics to a local printer.
  - Station computer has Microsoft Windows based operating system and must support Windows , 7 or Vista.
  - Station must have the option for patrons to pay fines and fees by credit and/or debit card.
  - For credit/debit card use, system must be able to write a transaction log or, optionally, an error-only transaction log.
  - Station must have the option to unlock media security cases only after a patron has successfully checked the item out. This unlocking capability must support the commonly used brands of locking cases, including, but not limited to, One Time Cases. The AV unlocking capability must be integrated directly into the self-checkout process and prevent patrons from unlocking items that have not been checked out.
  - System must be able to be managed remotely for updates, changes to configuration, etc. This remote administration application must have the ability to push changes to all stations without overwriting those settings that must remain distinct for each station.
  - Information available in the reporting module includes a number of different time ranges, successful checkouts, language selected, average number of items checked out, and more. Information is stored in Microsoft Sequel Server or equivalent formats.
  - Payment software must be PCI compliant with third party certifications.
  - Vendor's AV unlocking station can accommodate One Time Cases.
  - Un-lockers must be integrated into the self-checkout station.
  - Release station must also identify the item's RFID tag and deactivate the security bit as part of the self-check process.
  - Security gate pedestals must not damage or erase magnetic material.

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- Tag detection rate exceed 98% in random orientation regardless of the number of tags and/or tag formats present in the gates' field.
  - Security gate pedestals operate with the library's network or circulation system and alarm as soon as an improperly checked out item passes through.
  - Pedestals have the option to remotely access patron counter stats and reset to zero via an Ethernet connection to the library's network.
  - Security gate pedestals possess both visual and audible alarms.
  - Security gate pedestals must conform to ADA requirements for door openings.
  - Vendor can offer multiple gate configurations for installation purposes, including directly into flooring or in to portable base plates.
  - Security gate pedestals must be capable of collecting item ID information for those items that have security that has not been deactivated.
  - Security gate pedestals have a built-in patron counter.
  - Security gate pedestals can perform bi-directional patron counting.
  - Vendor offers accompanying software with gates that allows the Library to monitor foot traffic, be alerted to security issues, and verify whether items have been checked out properly or not.
  - The portable reader features an anti-collision algorithm and be capable of reading no fewer than ten items of a thickness of 1/8" thick or more per second with 99% accuracy.
  - Reader must be able to automatically save scanned item data for upload into the ILS' inventory module without requiring a memory card to transfer data from the reader to a computer.
  - System must be able to scan shelves by waving a wand along the base of book shelves without having to stop for each item.
  - Handheld readers operate without cords and/or cables.
  - Readers are able to search for specific item numbers, providing an audible alarm when the item has been detected and showing the item's title on-screen.
  - Design is ergonomically sound with the ability to reach book shelves in the library that are 90 inches high with an average staff member 66 inches tall.
  - For ergonomic purposes, the handheld part of the reader will not weigh more than 1.50 lbs.

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- Reader must be able to identify items with security disabled.
  - Using a shelf-order list, the system must be capable of determining if an item is shelved outside of an acceptable range (outside of a hand's width from its exact location).
  - Reader offers data collection, security verification, search, shelving, sorting, and pulling capabilities and issue audible and visual tones for notification purposes.
  - Diagnostic tools are built in for ease of use.
  - Tagging carts/stations have an RFID reader, antenna, optical bar code scanner, small Windows laptop and battery built into a metal case with handle for transporting.
  - The system does not require any interface with the Library's ILS.
  - Staff will be able to track the number of items converted and utilize a weed-list to prevent conversion of items that are to be removed from the collection
  - System is capable of reading a barcode label on a single item and encoding a new RFID tag with the barcode information in sub-second time with 100% accuracy.
  - Data storage does not rely on a memory card; rather, storage is limited only by the memory size of the laptop to which the reader is connected.
  - The system must include an easily maneuverable case and battery for use in the stacks for up to four hours without requiring access to external power. The system can also be used with a standard wall outlet.
  - System must be able to turn on the security bit for each tag that is programmed.
  - Tagging software is provided with this station and preloaded on the laptop.
  - Tagging station must be available for lease.
  - Tagging station must be able to operate using electrical power delivered from a wall outlet or from an external rechargeable battery.
  - Tagging station must be available as a mobile system that includes software, RFID reader, and antenna, barcode scanner with flexible stand, aluminum case with carrying handle and a rechargeable battery with an external battery option.

## COMPARATIVE CRITERIA

	<b>Highly Advantageous</b>	<b>Advantageous</b>	<b>Not Advantageous</b>
<b>I. General Qualifications</b> A proven track record with providing similar-sized A proven track record with providing similar-sized Libraries complete RFID systems and real-time integration with Evergreen	Has outstanding experience, with a proven track record, providing same scope of services to Libraries of similar size	Has adequate experience, with a proven track record, providing same scope of services to Libraries of similar size	Has limited experience, with a proven track record, providing same scope of services to Libraries of similar size
<b>II. Presentation, Communication &amp; Vision</b> A superior vision how the firm complete project, with details of past similar projects and timeline for Lowell project	Has communicated, through the submittal process, a superior project plan and knowledge how to achieve a successful RFID project in Lowell.	Has communicated, through the submittal process, an adequate project plan and knowledge how to achieve a successful RFID project in Lowell.	Has communicated, through the submittal process, a limited project plan and knowledge how to achieve a successful RFID project in Lowell.
<b>III. Project Team</b> An experienced and capable project team and project manager	Has a superior project team and an experienced project manager, both with significant expertise relevant to the project	Has a project team and an experienced project manager, one of which has limited expertise relevant to the project	Has a project team and an experienced project manager, both with limited expertise relevant to the project
<b>IV. Market Familiarity</b> Firm has demonstrated the ability to provide the services	Has experience/resources that indicate a strong likelihood of success	Has experience/resources that indicate a moderate chance of success	Has experience/resources that indicate the potential of success
<b>VI. References</b> Strength and credibility of client references	The proposal indicates three or more strong and credible client references with contact information providing similar scope of services	The proposal indicates two strong and credible client references with contact information providing similar scope of services	The proposal indicates only one strong and credible client references with contact information providing similar scope of services

Interviews may be required at the City's discretion after review of the technical proposals. Companies will be provided with advance notice of at least five (5) working days.

**System & Component Pricing – submit in separate envelope**

In addition to the vendor’s own attached quote sheet, proposal responses should include detailed pricing information. Vendor shall supply amount needed, unit prices, and extended prices for the proposed solution, including all hardware, software, installation, shipping, and training. Provide pricing for any proposed options that have been included in the response as well. Please also indicate annual support and maintenance charges for the proposed solution for a period of five years following installation. Note any discounts if the Library chooses to pay for maintenance of the RFID system upfront. Shipping and any applicable taxes should be listed separately. Prices must be guaranteed for ninety days following proposal due date.

**Vendor: please complete the table below with pricing information.**

<b>PRODUCTS</b>	<b>QUANTITY</b>	<b>PRICE PER UNIT</b>	<b>EXTENDED PRICE</b>
RFID Book Tags	188,300		
RFID Disc/Media Tags	20,000		
Conversion Station – lease	– @ – weeks		
Circulation Staff Equipment	11		
Self-Checkout Equipment	2		
Fines & Fees Functionality – credit/debit	2		
Fines & Fees Functionality – cash/credit	2		
Detection System – [ 2 aisles]	3		
Portable Inventory Handheld Reader	3		
Labor to Retrofit entire collection			
Installation			
Shipping			
Training			
First Year Hardware and Software Maintenance			
Other (Explain)			
<b>TOTAL RFID SOLUTION:</b>	<b>\$</b>		

**Annual Maintenance after the First Year**

Please provide annual maintenance costs for the system quoted above after the first year warranty. Vendor should indicate annual support and maintenance charges for the proposed solution for a period of five years following installation. Note any discounts if the Library chooses to pay for maintenance of the RFID system upfront.

<b>SOFTWARE ANNUAL MAINTENANCE</b>				
Year 2	Year 3	Year 4	Year 5	Year 6
<b>EQUIPMENT ANNUAL MAINTENANCE</b>				
Year 2	Year 3	Year 4	Year 5	Year 6