REQUEST FOR PROPOSAL
IT Assessment & Strategy
RFP # CML 15-012

For Columbus Metropolitan Library (the “Library”)

Issued by:
Purchasing Division
96 S. Grant Ave.
Columbus, OH 43215

Deadline for Submittal:
April 14, 2015
No later than 12:00 Noon
REQUEST FOR PROPOSAL  COVER SHEET

The Columbus Metropolitan Library ("CML" or "Library") is issuing this Request for Proposal ("RFP") IT Assessment & Strategy. The Proposal Identification Number is CML 15-012.

Proposals must be received at the Columbus Metropolitan Library, 96 South Grant Avenue, Columbus, Ohio 43215 no later than 12:00 Noon on Tuesday, April 14, 2015. Any Proposal ("Proposal") arriving after 12:00 Noon will be marked late and will receive no consideration for selection to provide the specified services.

All questions or requests for clarifications should be submitted no later than 5:00 p.m. on Wednesday, April 8, 2015 to purchasing@columbuslibrary.org.

The Offeror ("Offeror") declares to have read and understood and affirms, by its signature below, to be bound by all the instructions, terms, conditions and specifications of this RFP and agrees to fulfill the requirements of any contract ("Contract") for which it is selected to provide the specified services at the prices proposed.

The Offeror certifies, by signature affixed to this Request for Proposal Cover Sheet, that the information provided by in response to the RFP, including certified statements, is accurate and complete.

<table>
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<tr>
<th>Federal Taxpayer Identification Number (TIN)</th>
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<tr>
<td>Name of person signing bid (Please print or type)</td>
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<tr>
<td>Offeror Name</td>
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<td>Mailing address</td>
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<td>Contact Person</td>
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<td>E Mail address</td>
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<td>Authorized Signature (Original signature only) Please use Blue Ink.</td>
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THIS FORM MUST BE SIGNED AND SUBMITTED WITH THE BID.
Purpose

The Columbus Metropolitan Library is requesting proposals from technology consulting firms for a Technology Assessment and the development of Multi-Year Strategic Technology Plan. The Columbus Metropolitan Library intends to contract with a qualified firm to perform a technology assessment to address current and future Library technology needs and solutions.

The Proposal response should include:

1. Scope of work and approach
2. Schedule of services and timeline
3. Estimated cost
4. Qualifications and references

Background

The Columbus Metropolitan Library consists of 25 locations throughout Franklin County, Ohio. The Library has approximately 800 employees. The Library also provides Outreach Services, serving a diverse population with varying needs, ranging from preschoolers to senior citizens.

The Library adheres to a long-term strategic plan, first developed in 2003 and updated in 2012, with guidance from members of the community, library staff, Friends of the Library and the Library’s Board of Trustees. This strategic plan provides measurable objectives, clear initiatives and includes the following five sectors for concentrated focus:

1. Young Minds: encouraging learning and growth for a foundation for a successful life
2. My Library: building the next generation library that results in a library that works for me
3. Life Skills: embracing challenges and providing opportunities for a community that reaches its potential
4. The Library’s Partners: leverage our community maximize the library’s reach and impact
5. The Library’s Staff: grow our team to provide a world class experience

The Columbus Metropolitan Library’s Infrastructure Technology department consists of approximately 24 staff members across five areas of support as outlined below.

Infrastructure Services

The Infrastructure Services team is responsible for maintaining all aspects of the CML technical infrastructure and network services. This includes implementing, supporting and maintaining all network, firewall, server, storage and telecommunication infrastructure hardware and services.

Project Management

The Project Management team is involved with managing, monitoring and reporting on active IT projects which include tactics, 2020 related IT initiatives, and departmental projects approved by leadership. Reporting and oversight frequently progress to executive level management for strategic decisions on project progress and direction. Additionally, the Project Management team is responsible for defining and maintaining standards for project management within the IT department. The Project Management team is a source of guidance and best practice on project
management and execution for other areas of the organization such as the Business Process Review team (BPR.)

**Enterprise Applications**

The Enterprise Applications team is responsible for supporting many core applications used by CML business units. Primary applications include the Integrated Library System and Financial System. These groups help to improve business processes throughout the organization by configuring applications or managing vendors to create workflows or necessary solutions.

**Service Desk Division**

The Service Desk is responsible for answering staff's phone calls to the help line, giving answers to any library technology question, and providing troubleshooting assistance. The Service Desk staff can guide you to fixing your computer problem right over the phone or we can remotely fix it for you. In addition, this group takes care of many behind the scenes tasks related to the daily maintenance and operation of computer systems, such as backups, security patching, software updates, and reports processing.

**Web and Applications**

The Web and Applications team is responsible for the Library’s web and database systems. Web and Applications works closely with the Marketing Department to deliver on the strategy and vision of the Library’s Web sites. This group also works closely with all business units to coordinate digital services efforts system-wide in order to provide a seamless and intuitive experience for web applications and gathers data in support of CML’s organizational business intelligence strategy.

**Goal of Engagement**

The goal of the engagement will be to perform an IT assessment of the Libraries current technology solutions, infrastructure, and organizational structure; provide a strategic plan that addresses all major aspects of information technology in a multi-year timeframe, and provide tactical recommendations for improvements that move the technology needs of the organization forward faster. The Contractor will be required to evaluate the Columbus Metropolitan Library information technology systems and organizational structure to determine:

1. How the information technology (IT) structure compares to Libraries of similar size and characteristics in regards to budget, staffing levels, supported application systems, and other comparable measures
2. A recommended organization, reporting structure, policies, or procedures that can be implemented to improve the delivery of information technology systems library wide
3. How to harness emerging technologies while maximizing the value from the Library’s legacy systems
4. How to resolve operational challenges and achieve deep, sustainable cost reductions
5. Measurable, short- and long-term business results that translate strategic objectives into cost-effective IT initiatives
6. Immediate IT needs for positions the department will require to deliver more business benefits in the future
Project Deliverables

1. The Offeror will be expected to deliver a comprehensive plan in its Proposal covering a deep-level assessment of the Columbus Metropolitan Library’s information technology
   a. Existing infrastructure
   b. Infrastructure needed to meet the Library’s objectives
   c. Required additions and changes
   d. Comparison of alternatives
2. Recommendations that aligns each IT process, skill, and technology area with a suggested plan and sequence of implementation (roadmap) to be executed over a multi-year strategy
3. Estimated cost for assessment, implementation time and strategy to execute for each recommendations and alternatives
4. A presentation to CML senior management including summaries of the information technology assessment and recommendations

Expected Benefits of the Assessment

The benefits of the assessment, recommendations and report should articulate:

1. How to bring new capabilities into the business, with minimal cost increase, that reduces pressure to compete for in-house talent
2. A direction that creates reliable technology standardization
3. A method to deliver on more IT priorities and decrease time of deployment
4. Utilization of cloud-based services to improve IT security and minimize risk
5. A direction to reduce hardware and facility investments and improve service resiliency and Business Continuity capabilities
6. How to create additional IT capacity and increase the speed of IT upgrades, becoming more nimble
7. Redirect training efforts and reduce overall training costs with a goal to refocus and improve effectiveness of IT staff
8. How to increase IT’s level of support so that it provides a more efficient service experience
9. A method that builds stronger alignment of technology service offerings that are in alignment with the Library objectives
10. How dependable outcomes are measured throughout a steady stream of results.
11. Aligns business and IT so that IT can deliver maximum value
12. A roadmap for CML IT to ensure the recommended model is successful through defined metrics
13. A means by which the Library is able to adopt new and relevant technology solutions
14. Other pertinent recommendations that will assist the Library’s desire to maintain reliable and efficient information technology support in a cost effective manner
Evaluation and Selection

The final decision will be based on the overall RFP response that is deemed most advantageous to the Library, based on the information provided.

Specific criteria that will be considered, during the evaluation, include:

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<th>Evaluation of Technical Proposal:</th>
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<td><strong>Responsiveness Criteria</strong></td>
<td><strong>Weight</strong></td>
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<tr>
<td>Qualifications and ability to perform</td>
<td>40</td>
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<tr>
<td>Offeror’s experience on project of similar scope</td>
<td>20</td>
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<tr>
<td>Qualifications and experience of proposed consulting members</td>
<td>20</td>
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<tr>
<td>Quality and comprehensiveness of the Proposal</td>
<td>10</td>
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<td>Input from reference contracts</td>
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The weighted points will be multiplied times the numbers of Criteria’s listed above for a maximum total of 500 points (5 points X 100) for the Technical Score.

**Evaluation of Cost Proposal:**
CML will rank costs on a relative bases for a maximum total of 125 points for the Cost Score.

CML will calculate costs based upon the Offeror’s estimated hour and applicable labor rates, along with a “not-to-exceed” total amount. Refer to Attachment 1. CML reserves the right to disqualify Proposals having costs that appear unrealistic or significantly understated for the services offered.

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<tr>
<th>Service Labor Rates</th>
<th>Total Hours</th>
<th>Not-to-Exceed Cost</th>
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**Not-to-Exceed Total ($):** _________________

The following formula will be used to determine the final score of the proposal:

**Total Points = Technical Proposal + Cost Proposal = ____________ pts.**

The maximum possible score is 625 points.
DIVERSITY

Because Columbus Metropolitan Library serves a diverse central Ohio population, CML has a strong preference for professional service providers to propose teams made up of MBE/DBE/WBE and/or EDGE certified staff to provide CML with a diverse professional staff representative of the central Ohio region in which they will be working and of the customers that CML serves every day. Minority Business Enterprises are encouraged to respond to this Proposal.

Proposal Submission Requirements

All proposals must be in a sealed envelope or appropriate packaging, with the Proposal Identification Number **RFP # CML 15-012** and title of the RFP (**IT Assessment & Strategy**) clearly marked on the outside.

All Proposals are due by **12:00 Noon, April 14, 2015**. Please send an original (blue ink) and four (4) copies to:

Columbus Metropolitan Library  
**Attn: Wanda Dixon, Procurement Analyst**  
96 South Grant Avenue  
Columbus, OH 43215

Proposals may also be delivered in person to the Security Desk, First Floor, Columbus Metropolitan Library, 96 South Grant Avenue, Columbus, Ohio 43215. **Proposals submitted via e-mail will not be considered.**

Any Proposals arriving after 12:00 NOON on the due date will be marked late and will receive no consideration for selection to provide the specified equipment, supplies and/or services. The Library will return, unopened, any proposals that are received after the deadline.

Proposal Format

The Proposal shall include the following information:

References: Provide at least three (3) references for similar projects completed during the last two (2) years. Include a description of scope and client references, including contact names and telephone numbers.

Resumes: Provide resumes for your proposed team (in particular, the proposed Project Manager), identifying each person’s responsibilities, billing rates, and current work assignments. Identify any contract employees or consultants.

Subcontractors: Clearly identify any elements of the required scope to be executed by subcontractors, consultants, Contractors, or persons other than full-time employees of your firm.
Columbus Metropolitan Library
Procurement Department

Standard Contract Terms and Conditions

Contract Components, Entirety, Changes Interpretation

Contract Components: This contract consists of this document, the Standard Contract Terms and Conditions, the Special Contract Terms and Conditions (if any), the specifications or scope of work (SOW), and any written amendments to this document, valid Columbus Metropolitan Library (CML) purchase orders or other ordering documents (together referred to as the “Contract”).

Entire Agreement; Parties to the Contract: This contract is the entire agreement between the individual or entity selected to provide equipment, supplies and/or services on the basis of a SOW submitted to CML in response to a request (referred to as the Contractor in these Terms and Conditions) and Columbus Metropolitan Library (CML).

Contract Changes: Waivers, Changes or Modifications to this Contract must be made in writing and signed by both parties. If a party to this Contract does not demand strict performance of any item of this Contract, the party has not waived or relinquished any of its rights; the party may at any later time demand strict and complete performance of the term.

Contract Orders: CML will order supplies or services under this Contract from the Contractor directly. The Contractor may receive purchase orders by telephone, facsimile, electronically or in person by authorized employees of CML. The Contractor is not required to fill an order date more than 30 days beyond the date of Contract expiration, termination or cancellation, unless the Contract provides for a quarterly delivery or quarterly service. Under a Contract that provides for quarterly delivery, the Contractor is not required to fill an order with a delivery date of more than 90 days beyond the date of Contract expiration, termination or cancellation.

Standard Invoice and Payment

Invoice: The Contractor shall submit two copies of invoices to Accounts Payable, Finance Department, Columbus Metropolitan Library, 96 South Grant Avenue, Columbus, Ohio 43215. The invoice must be a proper invoice to receive consideration for payment. A “proper Invoice” is defined as being free of defects, discrepancies, errors or other improprieties. Improper invoices will be returned to the Contractor noting the areas of discrepancy.

Payment: In consideration for the Contractor’s performance, CML will pay the Contractor at the rate specified in the contract. Payments will be made by electronic funds transfer (EFT). For all transactions, the Contractor must have a valid W9 form on file with the Finance Department. The completed form should be mailed to: Finance Department, Columbus Metropolitan Library, 96 South Grant Avenue, Columbus, Ohio 43215.

Payment Due Date: CML will pay invoices 30 days after it has received an invoice for supplies and services it has received and accepted, unless otherwise indicated herein.

Taxes: Columbus Metropolitan Library is exempt for all federal, state and local taxes as CML is part of Franklin County Government and has a 501 nonprofit status.
Term of Contract: This contract is effective upon the projected beginning date of the Contract Cover Page or upon signature of CML by the Fiscal Officer, whichever comes later in time. This Contract will remain in effect until the Contract is fully performed by both parties or cancelled in accordance with the Terms found herein.

Contract Renewal: This contract may be renewed solely at the discretion of CML for a period of one month. Any further renewals will be by agreement of both parties, any number of times for any period of time. The cumulative time of all renewals may not exceed two years.

Delivery

F.O. B. The Place of Destination: The Contractor must provide the supplies or services under this Contract F.O.B., the place of delivery/destination, unless otherwise stated. The address of delivery will be specified by the purchase order or other ordering document. Freight will be prepaid unless otherwise stated.

Time of Delivery: If the Contractor is not able to deliver the supplies or services on the date and time specified by CML ordering department on the ordering document, the Contractor must coordinate an acceptable date and time for delivery. If the Contractor is not able to, or does not, provide the supplies or services to an ordering department by the time and date agreed upon, CML may obtain any remedy provided below or any other remedy at law.

Minimum Orders-Transportation Charges: For purchase orders placed that are less than the stated minimum order, the transportation will be prepaid and added to the invoice by the Contractor to the delivery location designated in the ordering documents. Shipment is to be made by private or commercial freight service, airmail, water, parcel post, express or commercial package delivery, whichever is the most economical and expeditious method for proper delivery of the item. Failure of the Contractor to utilize the most economical mode of transportation shall result in the Contractor reimbursing CML the difference between the most economical mode of transportation and the mode of transportation used by the contractor. Failure to reimburse CML shall be considered a default.

Contract Cancellation; Termination; Remedies

Contract Cancellation: If a Contractor fails to perform any one of its obligations under this Contract, it will be in default, and CML may cancel this Contract in accordance with this section. The cancellation will be effective on the date delineated by CML.

A. Contract Performance is Substantially Endangered: If the Contractor's default is substantial and cannot be cured within a reasonable time, or if CML determines that the performance of the contract is substantially endangered through no fault of CML, CML may cancel this Contract by written notice to the Contractor.

B. Cancellation by Unremedied Default: If a Contractor's default may be cured with a reasonable time, CML will provide written notice to the Contractor specifying the default and the time within which the Contractor must correct the default. If Contractor fails to cure its default in the time required, CML may cancel this Contract by providing written notice to the Contractor. If CML does not give timely notice of default to Contractor, CML has not waived any of its rights or remedies concerning the default.

C. Cancellation by Persistent Default: CML may cancel this Contract by written notice to Contractor for defaults that are cured but persistent. "Persistent" means three or more defaults. After CML has notified Contractor of its third default, CML may cancel this Contract without providing Contractor with
an opportunity to cure, if the Contractor defaults a fourth time. CML shall provide written notice of the termination to the Contractor.

D. Cancellation for Financial Instability: CML may cancel this Contract by written notice if Contractor does not pay its subcontractors and material suppliers within 10 days of payment to the Contractor by CML. To the extent permitted by law, CML may cancel this Contract by written notice to Contractor if a petition in bankruptcy or similar proceedings has been filed by or against the Contractor.

**Contract Termination:** CML may terminate this Contract for convenience after issuing 30 days written notice to the Contractor.

**Remedies for Default:**

A. Actual Damages. The Contractor is liable to CML for all actual and direct damages caused by the Contractor's default. CML may buy substitute supplies or services, from a third party, for those that were to be provided by the Contractor, and CML may recover the costs associated with acquiring substitute supplies or service, less any expenses or costs saved by the Contractor's default, from the Contractor.

B. Deduction of Damages for Contract Price. CML may deduct all or any part of the damages resulting from Contractor's default from any part of the price still due on the Contract, after CML has provided prior written notice to Contractor of such default and intent to deduct damages from the Contract Price.

**Force Majeure:** If CML or Contractor is unable to perform any part of its obligation under this Contract by reason of force majeure, the party is excused from its obligations, to the extent that its performance is prevented by force majeure, for the duration of the event. The party must remedy with all reasonable dispatch the cause preventing it from carrying out its obligations under this Contract. The term “force majeure” means without limitation: Acts of God, such as epidemics, lightning, earthquakes, fires, storms, hurricanes, tornadoes, floods, washouts, droughts, and any other severe weather; explosions; arrests; restraint of government and people; strikes; and any other like events or any other cause that could not be reasonable foreseen in the exercise of ordinary care, and that is beyond the reasonable control of the party.

**CML Consent to Assign or Delegate:** The Contractor may not assign any of its rights under this contract unless CML consents to the assignment or delegation in writing. Any purported assignment or delegation made without CML’s written consent is void.

**Indemnification:** Contractor will indemnify CML, its employees, members of the Board of Trustees, and its Officers and administrators for any and all claims, damages, lawsuits, costs, judgments, expenses, liabilities that may arise out of, or are related to, the Contractor’s performance under this Contract, including the performance by Contractor’s employees and agents and any individual or entity for which the Contractor is responsible.

**Confidentiality:** Contractor may learn of information, documents, data, records and other material that is confidential in the performance of this Contract. Contractor may not disclose any information obtained by it as a result of the Contract without written permission from CML. Contractor must assume that all CML information, documents, data, records or other material is confidential.
Publicity: Contractor and any of its subcontractors may not use or refer to this Contract to promote or solicit Contractor’s or subcontractor’s supplies or services. Contractor and its subcontractors may not disseminate information regarding this Contract, unless agreed to in writing by CML.

Governing Laws; Severability: The Laws of the State of Ohio govern this Contract, and venue for any dispute will be exclusively with the appropriate court of competent jurisdiction in Franklin County, Ohio. If any provision of the Contract or the application of any provision is held by a court of competent jurisdiction to be contrary to law, the remaining provisions of the Contract will remain in full force and effect to the extent that the remaining provisions continue to make sense.

Workers Compensation: The Contractor shall carry Workers’ Compensation Liability Insurance as required by Ohio law for any work to be performed within the State of Ohio. Failure to maintain Workers Compensation Liability Insurance for the duration of the contract and any renewal hereto will be considered a default.

Automobile and General Liability Requirements: During the term of the Contract and any renewal hereto, the Contractor, and any agent of the Contractor, at its sole cost and expense, shall maintain a policy of automobile liability and commercial general liability insurance as described in this clause. Copies of the respective insurance certificates shall be filed with the Purchasing Division within seven (7) calendar days after notification by the CML of its selection of the Contractor to provide the specified supplies and/or services. Failure to submit the insurance certificates within the time period may result in the Contractor being considered in default. Said certificates are subject to the approval of the CML Procurement Manager and shall contain a clause or endorsement providing thirty (30) days prior written notice of cancellation, non-renewal or decrease in coverage will be given to the Procurement Manager. Failure of the Contractor to maintain this coverage for the duration of the Contract, and any renewals, thereto may be considered a default.

Automobile Liability: Automobile Insurance is required for anyone coming onto CML branches and/or property to deliver goods or perform services using a vehicle, which is owned, leased, hired, or rented by the Contractor. Any Contractor, broker, or subcontractor who will be on CML property, but not delivering goods or performing services, is required to carry Automobile Liability Insurance that complies with the state and federal laws regarding financial responsibility. Automobile liability insurance, including hired, owned, and non-owned vehicles used in connection with the Work, shall have a combined single limit coverage covering personal injury, bodily injury (including death) and property damage of not less than $2,000,000 per accident.

Commercial General Liability: Insurance coverage with a $2,000,000 annual aggregate and a $1,000,000 per occurrence limit for bodily injury, personal injury, wrongful death and property damage. The defense cost shall be outside of the policy limits. Such policy shall designate CML as an Additional Insured, as its interest may appear. The policy shall also be endorsed to include a blanket waiver of subrogation. The certificate shall be endorsed to reflect a per project/per location General Aggregate limit of $2,000,000. If the Contractor uses an umbrella/excess policy to meet the required limits, it is understood that the policy shall follow from per project/per location basis. It is agreed upon that the Contractor’s commercial general liability insurance shall be primary over any other coverage. The Purchasing Division reserves the right to approve all policy deductibles and levels of self-insurance retention.

Contract Compliance: The participating CML branches and departments will be responsible for the administration of the Contract and will monitor the Contractor’s performance and compliance with the terms, conditions and specifications of the Contract. If a branch or department observes any infraction such shall be documented and conveyed to the Contractor for immediate correction. If the Contractor fails to rectify the infraction, the
department/branch will notify the Purchasing Division in order to resolve the issues. These terms and conditions will be used by the Purchasing Division to resolve the issues.

**Warranties:** Unless otherwise stated, all supplies shall be new and unused. All products shall carry manufacturer’s warranties in addition to implied warranties. The Contractor warrants all supplies to be free from defects in labor, material, and workmanship (manufacturing) and be in compliance with the contract specifications.

**ADDITIONAL TERMS:**

1. This contract represents the entire agreement of the parties hereto, and may not be amended except in writing signed by both parties.
2. The CML is not responsible for any work or services provided by Contractor prior to the issuance of a P.O. by CML.
3. Contractor will supply its own tools and materials.
4. Contractor will make arrangements for EFT (electronic funds transfer).
5. A completed W9 form is required on file with CML prior to CML issuing payment for services provided by Contractor. The W9 form can be found at [http://www.irs.gov/pub/irs-pdf/fw9.pdf](http://www.irs.gov/pub/irs-pdf/fw9.pdf). Please fill out the form and return with the signed contract to the Procurement Department of the Columbus Metropolitan Library at 96 S. Grant Avenue, Columbus, OH 43215 or email purchasing@columbuslibrary.org.
The Offeror shall provide, in its Cost Proposal, a Total Not-to-Exceed Cost for all services to be provided. The Offeror’s prices should be presented in the following format:

1. Estimate of Total Hours required to perform all Work: ____________ hours.

2. Breakdown of hours by Staff Position and Service Level hourly rate ($) per Position.

3. Total Not-to-Exceed Cost: $ ________________

Submitted by: __________________________________________
(Name)
__________________________________________
(Title)
__________________________________________
(Company)
Date:  __________________________________________