COLUMBUS METROPOLITAN LIBRARY

Request for Proposal

Cloud-based IT Service Management (ITSM) System

Issue Date: April 30, 2018

RFP Number: CML #18-010

Issued by
Procurement Department
96 S. Grant Ave.
Columbus, OH 43215

Deadline for Submittal
Friday, May 25, 2018
No later than 12:00 NOON EST

OPEN TO ALL

Dan Jones, Procurement Buyer
Procurement Department
Telephone: (614) 849-1028; FAX: (614) 849-1140
djones@columbuslibrary.org

REQUEST FOR PROPOSAL COVER SHEET

The Columbus Metropolitan Library ("CML" or "Library") is issuing this Request for Proposal ("RFP") for a *Cloud-based IT Service Management (ITSM) System (* "Project"). The RFP Identification Number is: **CML #18-010**.

Proposals must be received at the Columbus Metropolitan Library, 96 South Grant Avenue, Columbus, Ohio 43215 no later than **12:00 Noon on Friday, May 25, 2018.** Any Proposal ("Proposal") arriving after 12:00 Noon will be considered 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 **Friday, May 16, 2018** to: procurement@columbuslibrary.org.

The Offeror ("Offeror") declares to have read, 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 goods or services at the prices proposed.

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

Federal Taxpayer Identification Number (TIN)		
Name of person signing proposal (Please print or type)		Title
Offeror Name		
Mailing address		
City	State	ZIP
Telephone		Toll Free Telephone
Contact Person		Fax Number
E-Mail address		
Authorized Signature (Original signature only) Please use Blue Ink.		

THIS FORM MUST BE SIGNED AND SUBMITTED WITH THE PROPOSAL

PROJECT OVERVIEW

The Columbus Metropolitan Library (CML) is seeking Proposals from qualified Offerors for the purchase of a Cloud-based IT Service Management (ITSM) product. In addition, CML is seeking a professional services engagement to implement the ITSM product.

The Library further intends to make a single award as a result of the RFP. CML may consider multiple awards if it is determined to be in the best interests of the Library.

Offerors, either directly or through their subcontractor(s), must be able to provide all products/services and meet all of the requirements contained in this solicitation and the successful Offeror (the Contractor) shall remain responsible for Contract performance, regardless of subcontractor participation in the work ("Work").

BACKGROUND

The Columbus Metropolitan Library consists of 25 locations throughout Franklin County, Ohio, and it employs 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 each patron.
3. Life Skills: embracing challenges and providing opportunities for a community to reach its potential.
4. The Library's Partners: leverage our community to maximize the library's reach and impact.
5. The Library's Staff: grow our team to provide a world class experience.

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 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 solicitation.

A completed Offeror's Diversity & Inclusion Participation Form or documentation of good faith efforts must accompany the completed Proposal. Please refer to Appendix C, *Offeror's Diversity & Inclusion Participation Form* to submit or denote omission of participation.

COMPLIANCE WITH APPLICABLE LAWS

By submitting a Proposal for Work on the Project, the Offeror acknowledges that it is in compliance with applicable federal, state, and local laws and regulations, including, but not limited to, the following:

Equal Employment Opportunity/Nondiscrimination. The Offeror agrees that if it is awarded a contract that in the hiring of employees for performance of work under the Contract or any

subcontract, neither it nor any subcontractor, or any person acting on its behalf or its subcontractor's behalf, by reason of race, creed, sex, disability as defined in Section 4112.01 of the Ohio Revised Code, or color, shall discriminate against any citizen of the state in the employment of labor or workers who are qualified and available to perform work to which the employment relates. The Offeror further agrees that neither it nor any subcontractor or any person on its behalf or on behalf of any subcontractor, in any manner, shall discriminate against or intimidate any employees hired for the performance of the work under the contract on account of race, creed, sex, disability as defined in Section 4112.01 of the Ohio Revised Code, or color.

Ethics Laws. The Offeror represents that it is familiar with all applicable ethics law requirements, including without limitation Sections 102.04 and 3517.13 of the Ohio Revised Code, and certifies that it is in compliance with such requirements.

PROPOSAL SUBMISSION REQUIREMENTS

The Offeror must address all of the requirements listed in the Request for Proposal. All Proposals must be in a sealed envelope or appropriate packaging, with the Proposal Identification Number **CML #18-010** and title of *Cloud-based IT Service Management (ITSM) System* clearly marked on the outside, addressed and mailed to the below address.

PROPOSAL SUBMITTAL**.** Each Offeror must submit a Technical Proposal and a Cost Proposal as part of its Proposal package. Proposals must be submitted as two (2) separate components (Cost Proposal and Technical Proposal) in separate sealed envelopes/packages. Each Technical Proposal package must be clearly marked "**Number CML #18-010 *Cloud-based IT Service Management (ITSM) System* – Technical Proposal**" on the outside of each Technical Proposal package's envelope. Each Cost Proposal package must be clearly marked "Number **CML #18-010 Cloud-based *IT Service Management (ITSM) System* – Cost Proposal**" on the outside of each Cost Proposal package's envelope.

The Proposal package must also include electronic versions of the Technical and Cost Proposals on separate and clearly labeled flash drives. In a separate sealed envelope labeled "**Number CML #18-010 *Cloud-based IT Service Management (ITSM) System* - Electronic Submission**", the Proposal package must include an electronic submission of two (2) MS-Windows formatted USB Flash Drives. Please clearly label each flash drive in accordance with its file contents as "**CML #18-010 Technical Proposal**" or "**CML #18-010 Cost Proposal**".

IMPORTANT: Technical Proposals must not contain cost or pricing information.
Each Offeror must submit one (1) original, completed and signed in blue ink, and four (4) hardcopies for a total of five (5) Technical and five (5) Cost Proposals in its package, plus electronic versions of each, to the following:

<div align="center">

Columbus Metropolitan Library
Attn: Dan Jones, Procurement Buyer
96 S. Grant Avenue
Columbus, OH 43215

</div>

Proposals may also be delivered in person to the First Floor Main Circulation Desk at the Columbus Metropolitan Library located at 96 South Grant Avenue, Columbus, Ohio 43215.

Proposals will be accepted until the time indicated in the RFP. The Library is not responsible for any late mail or late special service deliveries.

Any Proposal arriving after 12:00 NOON on the due date will be marked late and will receive no consideration for selection to provide the specified services. The Library may return, unopened, any Proposal that is received after the deadline.

PROPOSAL INSTRUCTIONS

Offerors are cautioned to carefully review all parts of the RFP. Allowance may not be possible for any error or negligence of the Offeror.

Proposals are to be prepared in such a way as to provide a straightforward, concise description of the Offeror's capabilities to satisfy the requirements of this RFP and provide sufficient information to fully establish the Offeror's ability to perform all of the actions, activities and functions described in this RFP.

Emphasis should be on conformance to the RFP instructions, responsiveness to the RFP requirements, completeness and clarity of content and should minimize extraneous marketing materials.

Costs for developing the Proposal are entirely the responsibility of the Offeror and shall not be chargeable to the Library.

The failure or omission of an Offeror to receive or examine any necessary document, form instrument, addendum, or other document shall in no way relieve any Offeror from obligations with respect to its Proposal. No claim for extra payment will be allowed based on an Offeror's lack of knowledge of existing conditions and problems arising there from.

PROPOSAL QUESTIONS

Any questions or clarifications regarding this RFP must be sent to the following address: procurement@columbuslibrary.org and reference the Proposal Identification Number **CML #18-010** and title of the RFP (*Cloud Based IT Service Management (ITSM) System).*

All questions must be submitted no later than 5:00 p.m. on **May 16, 2018.**

Offerors are encouraged to submit questions at any time during the inquiry period.

Answers to all questions will be documented and posted on the "Doing Business with CML" page of the Library's Website at: www.columbuslibrary.org/about/doing-business. Answers will be posted no later than 5:00 p.m. two business days after the inquiry period ends.

PROPOSAL FORMAT

Complete Proposal packages are to be organized and submitted in accordance with the instructions in this section. Responses shall be organized into the following marked or tabbed sections:

1. Offeror Description: Provide a brief description of the Offeror's company/organization including the Offeror's size and area of specialization.

2. Provide a brief statement summarizing how the Offeror is particularly qualified for this project.

3. Project Schedule/Installation Plan: Offeror shall describe its approach to completing the Project: how long will the installation take, what subcontractors will be hired for specific scopes of work, phasing, etc.

4. Work Plan: Offeror shall describe its approach for implementation.

5. The Offeror must have on staff a lead installer that is certified in the implementation of the selected ITSM solution. The Offeror must provide such certifications and accreditations of the lead implementation expert.

6. The Offeror should be able to provide all labor and materials necessary for the purchase, and implementation of the selected product.

7. The Offeror must provide a copy of the product warranty to include the period of time covered by the guarantee.

8. Comparable Projects: Description of related, recent project experience specific to installing the specified materials and role of key staff.

9. Provide responses to "Product Functional Evaluation Questions."

10. Offeror response to the statements and questions from the Requirements and System Specifications detailed in Appendix A.

11. Offeror response to Appendix B, Cost Proposal.

12. Offeror response to Appendix C, Diversity & Inclusion Participation Form

13. References: Three (3) references, including current contact name, e-mail address and phone number for similar projects.

14. The Offeror must include a completed W9 Form.

15. The Offeror must provide a Certificate of Insurance ("COI") with coverage per the terms provided herein and list CML as an Additional Insured. Waiver of Subrogation shall also apply and indicated on the COI.

SELECTION PROCESS

The Library's evaluation team, will review all Proposals and evaluate responses to the RFP.

The scale below (0-5) will be used to rate each Proposal on the criteria listed in Table 1.

DOES NOT MEET	WEAK	WEAK TO MEETS	MEETS	MEETS TO STRONG	STRONG
0 POINTS	1 POINT	2 POINTS	3 POINTS	4 POINTS	5 POINTS

CML will score the Proposals by multiplying the score received in each category by its assigned weight and adding all categories together for the Offeror's Total.
Representative numerical values are defined as follows:

DOES NOT MEET (0 pts.): Response does not comply substantially with requirements or is not provided.

WEAK (1 pt.): Response was poor related to meeting the objectives.

WEAK TO MEETS (2 pts.): Response indicates the objectives will not be completely met or at a level that will be below average.

MEETS (3 pts.): Response generally meets the objectives (or expectations).

MEETS TO STRONG (4 pts.): Response indicates the objectives will be exceeded

STRONG (5 pts.): Response significantly exceeds objectives (or expectations) in ways that provide tangible benefits or meets objectives (or expectations) and contains at least one enhancing feature that provides significant benefits.

Evaluation Criteria
The final decision will be based on the overall RFP response that is deemed most advantageous to the Library.

Specific criteria that will be considered during the evaluation include, but are not limited to:

1. Quality and comprehensiveness of the Proposal:
   a. Demonstrated understanding, by the Offeror, of the Library and the Library's requirements.
   b. Qualifications and ability to perform.
   c. Responsiveness and adherence to RFP instructions.
   d. Responsiveness to "Product Functional Evaluation Questions."
   e. Responsiveness to Appendix A questions.

2. Quality of the proposed solution.
3. Stability and viability of the product and Offeror.
4. Offeror's experience on projects of similar scope.
5. Input from reference contacts.

Evaluation of Technical Proposal

TABLE 1 - TECHNICAL PROPOSAL EVALUATION

Responsiveness Criteria	Weight

1. Quality and comprehensiveness of the Proposal:
   a. Demonstrated understanding, by the Offeror, of the Library and the Library's requirements.
   b. Qualifications and ability to perform.
   c. Responsiveness and adherence to RFP instructions.
   d. Responsiveness to "Product Functional Evaluation Questions."
   e. Responsiveness to Appendix A questions.
	35

2. Quality of the proposed solution.	25
3. Stability and viability of the product and Offeror.	20
4. Offeror's experience on projects of similar scope.	10
5. Input from reference contracts.	10

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 Appendix B. CML reserves the right to disqualify Proposals having costs that appear unrealistic or significantly understated for the services offered.

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.

Contract Award
The Contract is to be awarded based on qualified Proposals, as per the enclosed rating system and at the discretion and consideration of CML. The CML evaluation team may select finalists to be interviewed; however, a Contract may be awarded without such interviews.

CML is not, by virtue of issuing this RFP, obligated to enter into a Contract and reserves the right to not issue a Contract as a result of this solicitation.

All Offeror's that respond will receive notification if they have been selected or not.

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.

PROJECTED TIMELINE

The projected timeline for this RFP process is provided below. The Library may, at its sole discretion, modify the schedule as necessary to allow for thorough and complete analysis of responses.

Activity	Target Completion Date
Issuance of RFP Inquiry Period Begins	April 30, 2018
Inquiry Period Ends	May 16, 2018 (5:00 PM)
Final Response to Vendor Questions	May 18, 2018 (5:00 PM)
Due Date	May 25, 2018 by 12:00 p.m. (Noon)
Selection of Successful Offeror	TBA

CML reserves the right to modify this schedule at CML's discretion. Notification of changes in the response due date would be posted on the CML Website or as otherwise stated herein. All times are Columbus, Ohio Local Time

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 invoices to accountspayable@columbuslibrary.org. 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 of 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 Procurement Department 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 Procurement Department 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 Procurement Department in order to resolve the issues. These terms and conditions will be used by the Procurement Department 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. All times referenced herein are Columbus, Ohio local times.
3. *CML is not responsible for any work or services provided by Contractor prior to the issuance of a P.O. by CML.*
4. Contractor will supply its own tools and materials.
5. Contractor will make arrangements for EFT (electronic funds transfer).
6. 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. 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: procurement@columbuslibrary.org.

Product Functional Evaluation Questions

The Offeror must demonstrate how its proposed solution will comply with the following functional specifications. The Offeror shall provide answers to the following questions as they relate to the **CURRENT** release of the product. If this functionality is planned for a future release, enter the expected date for each question under the functional specification below. The Offeror shall be detailed and clear when responding to the following:

A. General

1.   Describe your product's dashboard capabilities.

B. Incident and Problem Management

1.   How is Knowledge Management integrated with Incident Management in your tool?
2.   Describe your product's ability to facilitate Problem Management.

C. Knowledge Management

1.   Describe your product's Knowledge Management Solution.

D. Service Asset and Configuration Management

1.   Describe how your Asset and Configuration Management components tie in with your Incident and Problem Management components, as well as the ability to report on historical issues.

Product Technical and Integration Evaluation Questions

A. General

1.   Provide a list of products and services that your product integrates with out of the box.
2.   Is functionality impaired on certain browsers? If so, list browsers that have limited functionality, as well as their limitations.
3.   How does your product support single sign-on and what methods are supported?
4.   Describe your product's database technology platform.
5.   Describe your product's licensing model.
6.   Describe the support model for your product including methods of contacts and availability.

Professional Services Questions

A. Training, Services and Support

1.   Describe your professional services during implementation (service desk, incident, problem, change); includes transition assistance.
2.   Describe your professional services during implementation (asset management, service-level management and service catalog); includes workshops, best practices and documentation.
3.   Describe your administration training (describe options and provide costs).
4.   Describe various technical support options available during business hours and provide pricing.

Services Required

The successful Offeror will be required to provide a variety of services as part of implementing the ITSM solution. The services provided will vary depending on the nature of the ITSM Toolset solution proposed by

the Offeror. Services are to include the following dependent upon solution provided. The Offeror shall describe, in its Proposal, how it will provide each of the following:

Implementation

1.   Offeror is to provide implementation assistance.
2.   Offeror is to develop project schedule and plans.
3.   Offeror is to provide quality assurance and oversight for all Offeror services.
4.   Offeror is to identify and schedule Offeror resources to meet project deliverables and timelines.
5.   Offeror is to provide a detailed implementation plan.

Implementation Design and Planning

1.   Recommendation on CML personnel required to support the system.
2.   Recommended conversion and migration approach (e.g., from various currently implemented solutions to proposed solution).
3.   Recommended test plans and procedures.
4.   Product documentation.

System Implementation Services

1.   Complete system implementation.
2.   Setup and configuration of all integrations fully supported in the current release of the product including, but not limited to Active Directory and single sign-on.
3.   Configure roles for users
4.   Provide post go-live support

Training Services and Support

1.   The selected Offeror shall provide all technical, operational, and administrative knowledge transfers required for CML personnel to successfully conduct activities related to the deployed solution.
2.   The selected Offeror must provide post go-live support which could include remediation or enhancement requests.

Appendix A: Requirements and Specifications

Cloud-based IT Service Management
(ITSM) System
RFP Number: CML #18-010

The Library is looking to move to a modern and flexible ITSM product with a SaaS model to simplify infrastructure.

Specifications

The product provided by the Offeror should include at a minimum the CORE components listed below to be considered responsive.

- Incident Management
- AD Integration
- Asset Management
- Reporting and SLA Management

CML is interested in the following optional components. Please provide any additional features or options that you feel may be relevant to this proposal. Include availability, limitation and extra cost.

- Self-Service/Service Catalog
- Change Management
- Problem Management
- IT Knowledge Management

Offeror shall indicate with an "x" those items where it meets, or not.

Meets	Does Not Meet	General Usability
		Ticket integration / linking between the various ITIL processes within the tool
		Out-of-box ITIL best practices and terminology within each process/module in the tool.
		Multiple request submission methods (e-mail, instant message, self-service/service catalog, phone, text message)
		Scalable to multiple departments and physical branch locations
		Online help and production documentation available to consultants/staff
		Internal staff can customize their filters, searches and bookmarks to quickly provide relevant information to their job function.
		Staff can enter new notes, but not modify existing notes, or all changes are tracked.
		Personalized user interface and options flexibility (i.e. customize your screen for your preferences and tools you use)
		Advanced searching - index based, full word, keyword, meta data
		Built-in escalation capabilities
		Ability to attach documents to tickets
		Ability for users to subscribe to published incidents, knowledge and information.
		Ability to set pre-approved communications, response templates, and phone messages
		Ticket creation templates

Meets	Does Not Meet	Incident and Request Management
		Ability to submit and track tickets on behalf of users (Non-Affiliates) outside the library system
		Tickets trackable/searchable both by the agent and the client.
		Parent / Child ticket capability: Ability to group multiple calls/tickets into a common or master incident
		Ability to create related tasks from a ticket.
		Ability to create and assign sub-tasks within one ticket.
		Customizable E-mail notifications to customers on ticket events
		Customizable E-mail notifications to support staff on ticket events, and push to tech via mobile app.
		Ticket creation or update via e-mail injection/reply
		Auto generated / Scheduled ticket generation
		Major incident notifications published in portal
		Automated ticket management - Support existing support processes with rule-based triggers, notifications and views
		Communication: Support personnel should be able to centrally manage support processes across multiple communication channels including email, web, social media, online chat and native support for mobile application platforms including iPhone, iPad and Android devices.
		Ability to log and track tickets within a central reporting database across multiple queues
		Embedded message functionality (Text message, SMS, Email, etc.)
		Support for tiered Service Level Agreements
		Ability to manually route or assign tickets
		Easy access to view ticket history
		Ability to apply a bulk change or communication to multiple incidents
		Offers the ability to drive work group routing by Categorization or Configuration Item
		CC field so clients and agents can be notified of ticket events
		Ability to escalate cases between multiple tiers or levels of consultants and groups
		Ability to set priority/severity level
		Ability to define and set required fields
		Ability to track approvals of certain tasks when required
		Ability to differentiate work order types (new, add, change, remove, etc.)
		Ability to prioritize and categorize calls (incident, service request, request for information, etc.) and report on different categories
		SLA-based ticket escalation
		Auto identification of thresholds of similar cases over specified time frame
		End user acceptance capability: Ability to accept legal acceptable use policy, Permission to repair, not held liable, etc.

Meets	Does Not Meet	Problem Management
		Ability to search for potentially related incidents/problems based on different criteria; e.g. Configuration Item, Description and Group
		System automatically prompts user with potentially related tickets based on multiple criteria.
		Ability to manually set priorities and severities
		Linking between related items (incidents, problems, tasks, service requests)
		Supports suspended or deferred status
		Ability to create, modify and close Problem records
		Route and assign problem records to pre-defined support staff or groups
		Ability for agents to assign impact and urgency codes to problem records
		Ability to generate customizable management reports
		Ability to create a problem record and assign multiple tickets beneath
		Ability to request a system change based on a problem and link associated documentation
		Ability to flag and close a problem record as unresolved

Meets	Does Not Meet	Change Management
		Facilitate the recording and storage of Request for Changes (RFC) in an easily accessible format
		Supports change approval routing
		Capturing rollout and back out plans
		Ability to manually set priorities and severities
		Ability to break changes into multiple stages and assign/view status of each stage
		Ability to create change workflows with tasks assigned to multiple groups

Meets	Does Not Meet	Asset Management and Configuration Database (CMDB)
		Integrates with SolarWinds
		Integrates with SCCM
		Manual import into asset database and CMDB
		Scan ability from Mobile app
		Location Information
		Batch add of assets
		Display, in a graphical format, the configuration or network maps of interconnected CIs, and to input information about new CIs via such maps.
		Ability to track resources and assets separate from clients in tickets (for example, see a specific computer's history regardless of end user)
		Ability to bulk-load configuration items and CI changes
		Ability to tag a resource or asset as "down" or "unavailable" and report on the time spent in that state.

Meets	Does Not Meet	Knowledge Management
		Import of articles
		Creation of articles
		Indexing
		Permission levels
		Star rating
		Modification date
		Support for pre-built knowledgebase articles
		Article templates
		Easy searching of indexed documents
		Searches of previously resolved tickets
		Ability to publish to a specified audience using defined security parameters. This includes the ability to limit viewing ability to particular internal groups as well.
		Support for knowledge lifecycle.
		Standard ITIL metrics for reporting
		Topic tags

Meets	Does Not Meet	Service Catalog / Self Service / Customer Functionality
		Web self-service (service request, search knowledge base, register devices, monitoring, and update)
		Customizable for specific customer groups
		Self-service options customizable per specific group, unit, or permission level
		Accessible from a variety of interfaces (laptop, desktop, phone, tablet)
		Ability to display a variety of information (hours, service level, service availability, etc.)
		Current issues published as news on portal
		Customer friendly web interface
		User request form to allow end user options to generate requests
		Customers can search their previous tickets
		Customers can add additional notes/information to existing tickets
		Customers can view incidents, changes, service requests, and billing info of their own tickets
		Customers assigned to a specific role (department head/department contact) can view all of the tickets, reports, dashboards and related information for that department.
		Integrated knowledge base invoked during web self-service and independently searchable

Meets	Does Not Meet	Reporting / Analytics
		Detailed and flexible reporting and dashboards
		Executive level
		Tech Level
		Management Level
		Scheduled
		Out-of-box ITIL best practices and terminology.
		Full featured out of the box reporting, external report capability and standard reports.
		Ability to query external data sources to create more comprehensive reports - Example - Incident data tied together with data from ERP
		Ability to create ad hoc reports via external report tools, APIs, programs and scripts

Meets	Does Not Meet	Surveys
		Generate feedback surveys
		Customize questions for surveys
		Schedule surveys
		Set rules on when to send surveys (e.g. after so many requests from a user is closed)
		Multi Language Surveys
		Tool can be used to generate and send non-feedback surveys

Meets	Does Not Meet	Custom Workflows
		Queue Configuration - Ability to easily build workflows within and between task and project queues.
		Ability to send custom emails to customers under specific circumstances. e.g. - Ticket is closed, escalated, or reassigned.
		Ability to flag tickets for follow up (Training, specific instances, quality review, etc.)
		Ability to auto populate ticket fields based on templates (e.g. - password reset)
		Drag and drop ability to create and modify workflows
		Creation and modification without programming
		Ability to customize and manage queues at the departmental level
		Prebuilt workflow templates available

Meets	Does Not Meet	Cost Structure
		Named licensing
		Concurrent licensing

Appendix B: Cost Proposal

Cloud-based IT Service Management
(ITSM) System
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Instructions:

The cost shall contain all price information in the format specified on the Proposal Price Submission Form. Offerors are to complete Appendix B only as provided on the form. Do not amend, alter or leave blank any items on the Proposal Price Submission Form or include additional clarifying or contingent language on or attached to the form. Failure to adhere to any of these instructions may result in the proposal being determined to be non-responsive and rejected by the Library.

ITSM License

Cost Items	Counts	Price Each License ($)	Year 1 Total Cost ($)	Year 2 Total Cost ($)	Year 3 Total Cost ($)	Year 4 Total Cost ($)	NOTES
Named Technician User	17						
	17						
	Total License Fees	$					
	Four Year Total Cost	$					

Cost Items	Counts	Price Each License ($)	Year 1 Total Cost ($)	Year 2 Total Cost ($)	Year 3 Total Cost ($)	Year 4 Total Cost ($)	NOTES
Concurrent Technician User	6						
	6						
Total License Fees		$					
Four Year Total Cost		$					

Professional Services

Service Type	Service Labor Rates ($ / hr)	Total Hours	Not-to-Exceed Cost ($)
ITSM Implementation			
Training Fees			
Total			

Total Not-To-Exceed ($) (Four-Year Total Cost Concurrent License + Professional Services):

$ _____

Total Not-To-Exceed ($) (Four-Year Total Cost Named License + Professional Services):

$ _____

Appendix C

**Cloud-based IT Service Management
(ITSM) System
RFP Number: CML #18-005**

Offeror's Diversity & Inclusion Participation Form

A completed Offeror's Diversity & Inclusion Participation Form or documentation of good faith efforts must accompany the completed Form of Proposal or Bid Form.

_____ ("Offeror") submits the following information regarding its levels of MBE/WBE Participation:

List all MBE/WBE subcontractors and suppliers, with contract amounts, that Offeror will use for its work on the Project. (Continue list on additional sheets of paper if necessary.)

Name of Subcontractor / Supplier	MBE or WBE	Subcontract Amount
1.		$
2.		$
3.		$
4.		$

	A. TOTAL AMOUNT OF MBE/WBE SUBCONTRACTS	**$**
	PROPOSED TOTAL	**$**
	B. PERCENTAGE OF DIVERSITY PARTICIPATION* (A ÷ B x 100)	**%**

The Offeror's commitment of total workforce hours for Minority Workforce participation on the project is: _____%.

The Offeror's commitment of total workforce hours for Women Workforce participation on the project is: _____%.

I certify under penalty of perjury that the forgoing and/or attached statements and information are true and correct. The undersigned will immediately notify the Owner in the event that any of the information provided in this Diversity & Inclusion Participation Form changes in any material way.

By: _____ Date: _____

Print Name and Title: _____

*If the Offeror does not indicate that it has achieved the Diversity & Inclusion Participation Goal set forth in the Instructions to Offerors, the Offeror must attach to this Form, a narrative, including exhibits, demonstrating and certifying that good faith efforts, as set forth in the Instructions to Offerors, were actively and aggressively undertaken by the Offeror, to reach such goals.