

**STATE OF WASHINGTON
OFFICE OF THE SECRETARY OF STATE
OLYMPIA, WASHINGTON**

REQUEST FOR PROPOSALS

RFP NO. 16-08

PROJECT TITLE: STATEWIDE DATABASE LICENSING

PROPOSAL DUE DATE:

EXPECTED TIME PERIOD FOR CONTRACT: July 1, 2016 – June 30, 2018 with three (3) optional one-year extensions.

ELIGIBILITY: This procurement is open to those firms that satisfy the minimum qualifications stated herein and that are registered to do business in Washington State.

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1. INTRODUCTION

1.1 PURPOSE AND BACKGROUND

The Washington State Office of the Secretary of State, Washington State Library_Division, hereinafter called "OSOS," is initiating this Request for Proposals (RFP) to solicit proposals from firms interested in participating in a project to provide web-based digital products or services to nonprofit libraries and their patrons throughout Washington State.

Since 1998, the Washington State Library, under the aegis of the Statewide Database Licensing Project, within the Library Development Program, has been procuring digital products, typically research databases, on behalf of the libraries and people of Washington, using federal Library Services and Technology Act (LSTA) funding to partially subsidize the purchases. Past procurement documents (e.g., RFPs) have been issued in 1998, 2000, 2004, and 2010.

The current contract, which expires June 30, 2016, serves 61 public libraries and library systems, 23 private institutions of higher learning, 35 community and technical colleges, including Washington Online (WAOL), 25 nonprofit medical/research/special libraries, including 2 state government agency libraries, all 9 Educational Service Districts (ESDs), representing about 300 school districts and 2,700+ K-12 schools, both public and private, and tribal libraries (26 are eligible; not all actually use the products). Under the terms of the current contract, the six state-funded institutions of higher education are also eligible to participate, but have not chosen to do so. All of the state's estimated 7,061,400 citizens are eligible to access the resources provided under the current contract, although some of the contract(s) offered under the terms of this RFP may be less comprehensive. See Exhibit D for information on participating libraries.

1.2 OBJECTIVE

1.2.1 General Objectives

Through Washington libraries, all Washingtonians will have access to a range of digital products and services with which to address their informational, educational, and recreational needs. And, Washington libraries will be able to leverage their resources to gain cost effective access to these products. The purpose of this RFP is to competitively select one or more vendors to provide web-based digital products or services from both the traditional set of resources offered under this project in the past (aggregated periodical databases, newspapers both national and local, and K-12 resources) as well as in other categories, as described below and in the body of this RFP. A successful proposal may include a response to one or more categories, as described below. One or more contracts may be awarded as a result of this RFP. Offers in non-subsidized categories (as described in Section 1.2.8. below) may optionally be promulgated to libraries without formal contract execution.

1.2.2 SDL Advisory Committee and Customer Definition

A committee of representatives from all types of libraries known as the Statewide Database Licensing Advisory Committee (SDLAC) assists in guiding this project and in making recommendations on behalf of the library community. OSOS is acting on behalf of the citizens of the State of Washington and the libraries of Washington State, as represented by the Statewide Database Licensing Advisory Committee (SDLAC), and the Washington State Library, hereinafter collectively referred to as the "CUSTOMER."

1.2.3 General Periodicals Database(s)

The CUSTOMER is seeking one or more databases of primarily full text magazine and journal articles covering a wide variety of subject areas and topics. There can be separate products for public vs. academic libraries, or a single all-inclusive product, but the needs of all types of libraries (public,

academic, K-12, special) should be addressed. Both popular and scholarly periodicals should be included in the proposal. The combined database package should offer a minimum of 5000 unique titles of which at least 70% should be full text. Coverage should include at least the current year plus ten (10) years and be searchable as a single file. All articles should include indexing, citations, and abstracting.

1.2.4 Newspaper Database(s)

The CUSTOMER is seeking one or more full text databases of newspapers in two categories: newspapers from Washington State and nationally prominent newspapers. The package of Washington State newspapers should include as many daily titles as possible. Weekly titles are also desirable, but are not the primary focus. The national package should include a representative collection of prominent daily newspapers from other regions of the country. Coverage for both packages should generally be for at least the current year plus ten (10) years and all titles offered by a vendor should be searchable as a combined file. The coverage for these papers should include all stories allowed by the publisher and not be limited to selective topical coverage such as business news. Citations and quality indexing are highly desirable.

The CUSTOMER is willing to consider purchasing packages from multiple vendors, if necessary to achieve the best result, but the total cost of the combined newspaper collections should not exceed one third to one half the total project budget, and lower priced (but high quality) packages are more likely to be selected. Separate pricing for each category (Washington State newspapers and national newspapers) is required, but combined package pricing may also be provided.

1.2.5 K-12 Resources

The CUSTOMER is seeking one or more products with content appropriate to children, teens, and younger students (K-6 and/or K-12). These products should emphasize age-appropriate research-oriented full-text content from sources such as magazines, journals, newspaper articles, books, and/or original content developed for the product, as well as a balance of content in media formats (e.g., graphics, video, sound). The product(s) should include a search interface designed for the younger researcher, and the content should be appropriate for elementary and secondary reading levels. The ability to limit or search by reading level is highly desirable, as is correlation with State K-12 Learning Standards including Common Core. The State's K-12 Learning Standards may be found here: <http://www.k12.wa.us/CurriculumInstruct/learningstandards.aspx>.

1.2.6 Subsidized Purchases

Contracts offered in the three primary categories listed above (General Periodicals, Newspapers, & K-12 Resources) are eligible for federal LSTA (Library Services and Technology Act) subsidies to participating Washington libraries up to a combined total subsidy of no more than \$250,000 annually and no more than 50% of the total cost for any particular contract or for any individual library's cost.

1.2.7 Offering Choices

The CUSTOMER is interested in providing choices to participating libraries in Washington State. Proposals that offer multiple choices that are considered to be of potential value to Washington libraries will be scored higher than those proposals that do not offer such choices. Choices that are offered may relate to one of the three primary categories listed above, or may focus on the types of "Other Resources" listed below (or both). These choices may be subsidized so long as the participating libraries are able to select one or more of the offered choices in place of one or more of the three primary category options, at no increase to the total contract cost, or if the individual library is willing to pay any required premium for the selected option(s).

It is requested that vendors who submit proposals in response to one or more of the three original and primary categories listed above consider providing alternatives for libraries to choose from. For

example, if a vendor does not have adequate resources in one or more of the three primary listed categories, that vendor could offer one or more other resources in their place. Even if a vendor is proposing in all three primary categories, within the proposal that vendor could offer alternatives. For example, if a particular library does not wish to purchase one or more of the resources provided in one or more of the primary categories, are there alternative products or packages of products that they could substitute in place of the components not desired?

Ideally, proposals offering these kinds of choices need to be structured in such a way that participating libraries can easily pick and choose from a variety of options, without significantly increasing the total cost of the package selected. Especially since any required premiums or costs that go beyond the total project budget will not be subsidized, and will have to be paid by the library that selects those options.

1.2.8 Other Resources

The CUSTOMER is interested in providing other types of electronic or digital resources to Washington libraries. These could include (but are not limited to) resources relating to genealogy, language learning, test/job preparation, business directories, auto repair, science, health, nursing, streaming audio/video, PreK and/or elementary level reading/literacy, encyclopedias, issues presented from multiple viewpoints, reader's advisory, and so forth. Proposals in these types of categories that do NOT include one or more resources from the three primary categories as described in Sections 1.2.3., 1.2.4, or 1.2.5. above, will not be eligible for LSTA subsidies, and will require funding to come exclusively from participating libraries.

1.3 MINIMUM QUALIFICATIONS

Vendor Qualifications: Vendors submitting proposals must meet the following minimum requirements at the time of proposal submittal to qualify for consideration

Licensed to do business in the State of Washington.

3 years' experience providing services similar to those described in this RFP.

Vendor Financial Stability: All information provided will be held in confidence within the proposal evaluation team and not used for any purpose beyond evaluation of the company as a potential business partner for the proposed products and/or services.

- During the past two (2) years and currently, has the company been the subject of any merger or acquisition inquiries? This includes any discussions that led to successful, ongoing, or abandoned proposals. If yes, please provide brief details as permitted.
- During the past two (2) years and currently, has the company initiated any merger or acquisition inquiries to another company? This includes any discussions that led to successful, ongoing, or abandoned proposals. If yes, please provide brief details as permitted.
- During the past two (2) years and currently, has the company undergone bankruptcy proceedings? If yes, please provide brief details as permitted.

1.4 FUNDING

OSOS has budgeted federal LSTA funds not to exceed \$250,000 annually for this project. Traditionally, participating libraries have contributed matching funds, making for a total annual budget up to \$500,000 for the project. If libraries choose to purchase additional products from vendors submitting proposals through this procurement process, beyond those previously offered through this project, and agree to pay additional funds for those products, the annual budget could exceed these amounts, but additional LSTA funds are not expected to be available.

Any contract awarded as a result of this procurement is contingent upon the availability of funding.

1.5 PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this RFP will begin on July 1, 2016 and will end on June 30, 2018.

OSOS reserves the right to extend the period of performance, at the sole discretion of OSOS, for up to three (3) additional one-year terms. Any extension will be subject to mutual agreement between OSOS and the Contractor. The total contract term may not exceed five (5) years.

1.6 DEFINITIONS

Definitions for the purposes of this RFP include:

OSOS – The Office of the Secretary of State, State Library Division, is the agency of the State of Washington that is issuing this RFP.

Proposer – A vendor (individual or company) submitting a Proposal in response to this RFP.

Proposal – A formal offer submitted in response to this solicitation.

Contractor – Company whose proposal has been accepted by OSOS and is awarded a fully executed, written contract.

Customer - The citizens of the State of Washington, as represented by the Statewide Database Licensing Advisory Committee (SDLAC) and the Washington State Library, on behalf of the libraries of Washington State.

Request for Proposals (RFP) – Formal procurement document in which a service or need is identified but no specific method to achieve it has been chosen. The purpose of an RFP is to permit the vendor community to suggest various approaches to meet the need at a given price.

SDLAC – The Statewide Database Licensing Advisory Committee.

1.7 ADA

OSOS complies with the Americans with Disabilities Act (ADA). Proposers may contact the RFP Coordinator to receive this Request for Proposals in Braille or on tape.

2. GENERAL INFORMATION FOR PROPOSERS

2.1 RFP COORDINATOR

The RFP Coordinator is the sole point of contact in OSOS for this procurement. All communication between the Proposer and OSOS upon receipt of this RFP shall be with the RFP Coordinator, as follows:

Name	Will Stuiivenga
Address	Washington State Library PO Box 42460
City, State, Zip Code	Olympia, WA 98504-2460
Phone Number	360.704.5217
Fax Number	360.586.7575
E-Mail Address	will.stuiivenga@sos.wa.gov

Any other communication will be considered unofficial and non-binding on OSOS. Proposers are to rely on written statements issued by the RFP Coordinator. Communication directed to parties other than the RFP Coordinator may result in disqualification of the Proposer.

2.2 ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES

Issue Request for Proposals	March 1, 2016
Letter of Intent to Propose Due	March 11, 2016
Question and answer period	March 1 – 17, 2016
Last date for questions regarding RFP	March 15, 2016
Place complete list of Q&As on WEBS and OSOS web site	March 17, 2016
Last amendment to RFP	March 23, 2016
Last day for complaint	March 25, 2016
Proposals due	April 1, 2016
Evaluate proposals for Sections 1.2.3, 1.2.4, 1.2.5	April 2 – May 16, 2016
Evaluate proposals for Section 1.2.8. Note: Other dates for Section 1.2.8 will be determined based on the evaluation completion date.	TBD, prior to September 31, 2016
Contract(s) negotiations and BAFO period for Sections 1.2.3, 1.2.4, 1.2.5	April 18 – May 16, 2016
Announce contract(s) awards to “Apparent Successful Bidder(s)” (ASB) and send notification via e-mail to unsuccessful proposers	May 16, 2016
Hold debriefing conferences (if requested)	See 6.5
Protest	See 6.6
Execute negotiated contract(s) for Sections 1.2.3, 1.2.4, 1.2.5	June 1, 2016
Begin contract work for Sections 1.2.3, 1.2.4, 1.2.5	June 1, 2016

OSOS reserves the right to revise the above schedule.

2.3 REVISIONS TO THE RFP

In the event it becomes necessary to revise any part of this RFP, amendments will be published on WEBS and the OSOS web site, as follows: <http://www.sos.wa.gov/office/procurements.aspx>. For this purpose, the published questions and answers from the preproposal conference and any other pertinent information shall be considered an amendment to the RFP and also placed on these sites.

OSOS also reserves the right to cancel or to reissue the RFP in whole or in part, prior to execution of a contract.

2.4 LETTER OF INTENT TO PROPOSE

Vendors interested in participating in this proposal process must have an authorized representative provide a Letter of Intent to Propose via e-mail (preferred), fax, or mail to the RFP Coordinator no later than March 11, 2016, 4:00 PM, Pacific Time. This Letter should also indicate in which categories the vendor plans to propose: one or more of the three original components: General Periodical Database component (Section 1.2.3), the Newspaper Database component (Section 1.2.4), the Database Product(s) for Children and Students component (Section 1.2.5), Other Resources component (Section 1.2.8), or a combination of these.

Failure to submit this Letter of Intent to Propose as scheduled shall be grounds to consider a proposal non-responsive. In addition, Vendors who do not submit a Letter of Intent will not be notified of any amendments to this RFP, or be provided with Questions and Answers.

2.5 SUBMISSION OF PROPOSALS

Proposers are required to submit an electronic version of their proposal. The proposal must be received by OSOS no later than 4:00 p.m., Pacific Time, on April 1, 2016. E-mail is preferred; attachments to the e-mail shall be in Microsoft Word format, except as specified elsewhere (e.g., Section 5.1 Letter of Submittal). Physical electronic formats such as CD-ROM or USB flash drive may be used, using Microsoft Word as the format for the electronic format proposals. If the electronic

version is provided in a physical format, two separate physical copies must be provided. An electronic version provided in a format that cannot easily be edited (e.g., PDF alone, without equivalent Microsoft Word version), will be considered nonresponsive. A PDF version may be provided as a more permanent reference supplement to the Microsoft Word version, if desired. Proposals may not be transmitted using facsimile transmission (fax).

The proposal is to be sent to the RFP Coordinator at the e-mail address noted in Section 2.1.

Late proposals will not be accepted and will be automatically disqualified from further consideration. All proposals and any accompanying documentation become the property of OSOS.

The Proposer's Response must respond to all of the solicitation requirements. Do not respond by referencing material presented elsewhere. The electronic copy of the Proposal shall be considered complete and shall stand on its own merits. Failure to respond to any portions may result in rejection of the proposal as non-responsive.

Include Proposer's contact information for this RFP with name, title, email, and telephone number. The Apparent Successful Proposer will be expected to enter into a contract which is substantially the same as the sample contract and its general terms and conditions attached as Exhibit B. In no event is a Proposer to submit its own standard contract terms and conditions in response to this solicitation. The Proposer may submit exceptions as allowed in the Certifications and Assurances form, Exhibit A to this solicitation. All exceptions to the contract terms and conditions must be submitted as an attachment to Exhibit A, Certifications and Assurances form. The OSOS will review requested exceptions and accept or reject the same at its sole discretion.

2.6 PROPRIETARY INFORMATION/PUBLIC DISCLOSURE

Materials submitted in response to this competitive procurement shall become the property of OSOS.

All proposals received shall remain confidential until the contract, if any, resulting from this RFP is signed by the Deputy Secretary of State and the apparent successful Contractor; thereafter, the proposals shall be deemed public records as defined under the Public Records Act, Chapter 42.56 RCW.

Any information in the proposal that the Proposer desires to claim as proprietary and exempt from disclosure under the provisions of RCW 42.56.270 must be clearly designated. The page must be identified and the particular exception from disclosure upon which the Proposer is making the claim. Each page claimed to be exempt from disclosure must be clearly identified by the word "Confidential" printed on the lower right hand corner of the page.

OSOS will consider a Proposer's request for exemption from disclosure; however, OSOS will make a decision predicated upon chapter 42.56 RCW and chapter 143-06 of the Washington Administrative Code. Marking the entire proposal exempt from disclosure will not be honored. The Proposer must be reasonable in designating information as confidential. If any information is marked as proprietary in the proposal, such information will not be made available until the affected proposer has been given an opportunity to seek a court injunction against the requested disclosure.

A charge will be made for copying and shipping, as outlined in RCW 42.56.120 or in the OSOS's rules and statutes. No fee shall be charged for inspection of contract files, but twenty-four (24) hours' notice to the RFP Coordinator is required. All requests for information should be directed to the RFP Coordinator.

2.7 MINORITY & WOMEN-OWNED BUSINESS PARTICIPATION

In accordance with the legislative findings and policies set forth in chapter 39.19 RCW, the state of Washington encourages participation in all of its contracts by firms certified by the Office of Minority

and Women's Business Enterprises (OMWBE). Participation may be either on a direct basis in response to this solicitation or on a subcontractor basis. However, no preference will be included in the evaluation of proposals, no minimum level of MWBE participation shall be required as a condition for receiving an award, and proposals will not be rejected or considered non-responsive on that basis. Any affirmative action requirements set forth in federal regulations or statutes included or referenced in the contract documents will apply.

The established annual procurement participation goals for MBE is 8 percent and for WBE, 4 percent, for this type of project. These goals are voluntary. Bidders may contact OMWBE at 360/753-9693 to obtain information on certified firms.

2.8 OFFER IN EFFECT FOR 120 CALENDAR DAYS

Proposer agrees that it may not modify, withdraw or cancel its proposal for a 120-day period following the RFP due date or receipt of best and final offer, if required.

2.9 RESULTING CONTRACT.

This RFP and any addenda, the Proposer's RFP response, including any amendments, a best and final offer (if any), and any clarification question responses shall be incorporated by reference in any resulting contract.

3. EVALUATION OF PROPOSALS

3.1 Responsiveness

3.1.1. "Responsible" and "Responsive"

A **"Responsible Offeror"** is an offeror who meets the elements demonstrating ability, integrity, and performance set out in RCW 39.26.160(2) and RFP 16-08.

A **"Responsive Offeror"** is an offeror who has submitted an offer which meets all the minimum mandatory requirements and specifications for the products and solicited in RFP 16-08.

3.1.2. Classification of Proposals as Responsive or Nonresponsive. OSOS shall initially classify all proposals as either "responsive" or "nonresponsive" RCW 39.26.160(1)(ii). OSOS may deem a proposal nonresponsive if: (1) any of the required information is not provided; (2) the submitted price is found to be excessive or inadequate as measured by the RFP criteria; or (3) the proposal does not meet RFP requirements and specifications. OSOS may find any proposal to be nonresponsive at any time during the procurement process. If OSOS deems a proposal nonresponsive, it will not be considered further. The RFP Coordinator will notify the offeror by mail.

3.2 Evaluation of Proposals.

The RFP Coordinator and an evaluation committee, herein jointly called "Committee," will evaluate all responsive and responsible proposals based on stated criteria and recommend an award. The Committee may initiate discussion, negotiation, or a best and final offer. In scoring against stated criteria, the Committee may consider such factors as accepted industry standards and a comparative evaluation of other proposals in terms of differing price and quality. These scores will be used to determine the most advantageous offering to OSOS. The RFP Coordinator may award one or more contracts from this solicitation.

3.3 Opportunity for Discussion/Negotiation and/or Oral Presentation.

After receipt of proposals and prior to the recommendation of award, the RFP Coordinator may initiate discussions with one or more Proposers should clarification or negotiation be necessary. The RFP

Coordinator, at his/her sole discretion, may elect to select the top scoring finalists from the written evaluation. This cut-off for highest scoring proposer(s) is based on several considerations including responsiveness, qualifications, competitiveness, suitability of the products and services offered, cost and economy, ability of the vendor to perform, and so on. Those proposers in the top scoring field may be asked to make oral presentations to clarify their RFP response or to further define their offer. Should RFP Coordinator elect to hold oral presentations, the top-scoring firm(s) will be contacted to schedule a date, time and location for the presentation.

3.4 Best and Final Offers (BAFO).

Offerors are encouraged to submit their most competitive offer, but there is a potential for a best and final (BAFO) process.

This section defines the BAFO process.

Once a Proposal has been submitted, Bidders will not be allowed to make material changes to those Proposals unless they receive a request for a BAFO from OSOS. The circumstances under which a BAFO may be requested are described in this Section.

OSOS reserves the right, that at any point after completing Stage 3, OSOS may notify all remaining Responsive and Responsible Bidders that OSOS will require them to submit BAFOs.

The notice will be in writing and will set a specific time and date certain by which the BAFO must be submitted to OSOS. The BAFO notice may set additional conditions and requirements for the submission of the BAFO. The notice will advise Bidders that the BAFO shall be in writing and that upon the closing date for submission, OSOS intends to select a lowest Responsive and Responsible Bidder. The BAFO Notice will be posted on WEBS. Prior to the closing date for the submission of BAFOs OSOS may, at OSOS's discretion, engage in discussion with all remaining Responsive and Responsible Bidders regarding how Bidders can make their Proposals more responsive to the selection criteria in the RFP. All Bidders shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of Proposals, and such revisions may be permitted after submissions and prior to award for the purpose of obtaining BAFOs. In conducting discussions, there shall be no disclosure of any information derived from Proposals submitted by competing Bidders.

For purposes of the BAFO, Bidders may make such changes to their original bids as they believe appropriate to enhance their potential for selection and award under the selection criteria set forth in the RFP and BAFO notice. Changes to the original bid must be clearly identified in the re-submitted proposal using the Track Changes function in Microsoft Word.

Evaluation of BAFOs and selection of a successful Bidder will be based upon the evaluation criteria set out in the RFP. Terms proposed as part of a BAFO must be substantially in accordance with the terms requested in this RFP and may not materially alter the requirements of the RFP.

Proposers are not required to submit a BAFO and may submit a written response stating that their original response remains as originally submitted.

Proposer(s) may be requested to make an oral presentation regarding their BAFO. The committee has full discretion to accept or reject any information submitted in a BAFO.

BAFO discussions shall not disclose the content or pricing of another offeror.

If a BAFO process is initiated, all offerors will be eligible for a debriefing conference. See section 4.5.

At the conclusion of negotiations with the lowest Responsive and Responsible Bidder OSOS will require that Bidder to submit a signed Contract as a BAFO pending acceptance.

3.5 Request for Documents Notice.

Upon concurrence with the Committee's recommendation, the RFP Coordinator will request from the highest scoring Proposer the required documents and information, such as insurance documents, contract performance security, an electronic copy of any requested material (e.g., proposal, response to clarification questions, and/or best and final offer), and any other necessary documents. Receipt of this request does not constitute a contract and no work may begin until a contract signed by all parties is in place. The RFP Coordinator will notify all other Proposers of the State's selection.

3.6 Contract Execution.

Upon receipt of all required materials, a contract (Exhibit B) incorporating the Standard Terms and Conditions, as well as the highest scoring Proposer's proposal, will be provided to the highest scoring Proposer for signature. The highest scoring Proposer will be expected to accept and agree to all material requirements contained in Exhibit B of this RFP. If the highest scoring Proposer does not accept all material requirements, the State may move to the next highest scoring Proposer, or cancel the RFP. Work under the contract may begin when the contract is signed by all parties.

4. CONTRACT AND GENERAL TERMS & CONDITIONS

4.1 CONTRACT

The apparent successful Proposer will be expected to enter into a contract which is substantially the same as the sample contract and its general terms and conditions attached as Exhibit B. In no event is a Proposer to submit its own standard contract terms and conditions in response to this solicitation. The Proposer may submit exceptions as allowed in the Certifications and Assurances section, Exhibit A to this solicitation. OSOS will review requested exceptions and accept or reject the same at its sole discretion.

4.2 COSTS TO PROPOSE

OSOS will not be liable for any costs incurred by the Proposer in preparation of a proposal submitted in response to this RFP, in conduct of a presentation, or any other activities related to responding to this RFP.

4.3 NO OBLIGATION TO CONTRACT

This RFP does not obligate the state of Washington or OSOS to contract for services specified herein.

4.4 REJECTION OF PROPOSALS

OSOS reserves the right at its sole discretion to reject any and all proposals received without penalty and not to issue a contract as a result of this RFP.

4.5 COMMITMENT OF FUNDS

The Deputy Secretary of State is the individual who may legally commit to the expenditures of funds for a contract resulting from this RFP. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract.

4.6 ELECTRONIC PAYMENT

The state of Washington prefers to utilize electronic payment in its transactions. The successful Proposer will be provided a form to complete with the contract to authorize such payment method.

4.7 INSURANCE COVERAGE

Should a contract be awarded pursuant to this RFQQ, the Proposer will be required to provide insurance coverage as described in Exhibit B, Service Contract with General Terms and Conditions.

5. PROPOSAL CONTENTS

Proposals must be electronically formatted for eight and one-half by eleven (8 1/2 x 11) inch "Portrait style" pagination with new page headings separating the major sections of the proposal. The four major sections of the proposal are to be submitted in the order noted below:

1. Letter of Submittal, including signed Certifications and Assurances (Exhibit A to this RFP).
2. Digital Products Proposal.
3. Cost Proposal.

Proposals must provide information in the same order as presented in this document with the same headings. This will not only be helpful to the evaluators of the proposal, but should assist the Proposer in preparing a thorough response.

Proposals should be straightforward and concise and provide "layman" explanations of technical terms that are used. Emphasis should be focused on responding to the RFP requirements, on providing a complete and clear description of the Proposal, and conforming to the RFP instructions. If a complete response cannot be provided without referencing supporting documentation, such referencing should be provided with the Proposal indicating where the supplemental information can be found. Proposals that merely offer "to provide services as described in this RFP" may be considered non-responsive and may not be considered for further evaluation.

Whenever the verb "describe" is used, please substitute "briefly describe," and keep descriptions succinct, while providing adequate information to explain whatever is being described. When expressions like "e.g.," or "such as" are used, the items which follow are to be treated as examples of the concept in question, and not necessarily as an exhaustive list. Responses should address the concept in its entirety, and should not be limited to the specific examples provided.

Items in this section marked "mandatory" must be included as part of the proposal for the proposal to be considered responsive; however, these items are not scored. Items marked "scored" are those that are awarded points as part of the evaluation conducted by the evaluation team.

5.1 LETTER OF SUBMITTAL (MANDATORY)

The Letter of Submittal and the attached Certifications and Assurances form (Exhibit A to this RFP) must be signed and dated by a person authorized to legally bind the Proposer to a contractual relationship, e.g., the President or Executive Director if a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship. These sections of the Proposal may be provided in PDF format. Along with introductory remarks, the Letter of Submittal is to include by attachment the following information about the Proposer and any proposed subcontractors:

1. Name, address, principal place of business, telephone number, and fax number/e-mail address of legal entity or individual with whom contract would be written.
2. Name, address, and telephone number of each principal officer (President, Vice President, Treasurer, Chairperson of the Board of Directors, etc.).
3. Legal status of the Proposer (sole proprietorship, partnership, corporation, etc.) and the year the entity was organized to do business as the entity now substantially exists.

4. Federal Employer Tax Identification number or Social Security number and the Washington Uniform Business Identification (UBI) number issued by the state of Washington Department of Revenue.
5. Location of the facility from which the Proposer would operate.
6. Identify any State employees or former State employees employed or on the firm's governing board as of the date of the proposal. Include their position and responsibilities within the Proposer's organization. If following a review of this information, it is determined by OSOS that a conflict of interest exists, the Proposer may be disqualified from further consideration for the award of a contract.

5.2 DIGITAL PRODUCTS PROPOSAL (SCORED)

Proposer's response must clearly indicate which category or categories of products (as defined in Section 1.2. of the RFP) are included in the proposal. Proposals may refer evaluators to web sites for additional product information beyond the brief descriptions requested here.

5.2.1 Periodicals Database(s)

If this proposal includes one or more periodicals databases (See Section 1.2.3.) list and provide a description of the database product(s) (500 words or less for each product) you are proposing. Any subject specific periodicals databases that are included in this proposal should be listed and described here. Briefly state the total number of titles as well as the number of full text titles in the proposed database package. Include counts for the current year as of the time of your response. Do not include any title lists within the body of the proposal itself. Title lists may be provided separately, in electronic format, or linked from Proposer's website.

Definitions (use these definitions when responding to any relevant items below):

- A. The term "full text" is defined as providing readers with full access to the intellectual content of a publication. To be considered full text, the preponderance of content of all or most articles, editorials, letters to the editor, reviews, and other items of intellectual content in the publication must be included in the database (syndicated content which a publisher is not authorized to provide is excepted from this definition). Periodicals from which only a portion, or only selected content, appear in the on-line version are not considered to be full text. Ideally, citations for any missing items should be provided.
- B. The term "current" is defined as any title for which there is no close date, and for which the database carries the most recent issue permitted by the publisher. A title for which full text coverage exists in the past, but for which current full text coverage is not provided, may not be included in counts of current full text titles.
- C. The term "closed title" is defined as any title for which current coverage (either full text or abstracting and indexing) is not available in the database being proposed, regardless of the reason.
- D. The term "embargo" is defined as any defined period of time between publication and the right to add the content to the Proposer's database.
- E. The term "exclusive" is defined as any title for which the Proposer has an agreement with the publisher or source, limiting or excluding access through other venues or entities, such as other database producers or competitors. In addition to titles available only through the Proposer's database, a title which is provided without embargo by Proposer, where competitors can only offer the same content with an embargo, is considered to be exclusive.

For any periodical databases included in the proposal, provide the following detailed title counts individually for each database. Use Exhibit E: WA-SDL RFP Periodical Title Count.xlsx, a spreadsheet, to record responses to the following questions:

- a. How many titles, total, are included in your proposed periodical database(s)?
- b. How many current full text titles are included? (Provide total number and percentage).
- c. What is the average length of backfile provided for current full-text titles? How many current full text titles provide full text backfiles as follows:
 - i. Greater than 1 year but less than 3 years?
 - ii. Greater than 3 years but less than 5 years?
 - iii. Greater than 5 years but less than 10 years?
 - iv. 10 years or more?
- d. Describe the full text formats (e.g., text, text + graphics, page image, etc.) available for full text content, and the number and percentage of full-text titles for which each format is available.
- e. Are there full-text titles for which graphs, charts, and images (or any other graphical content) that were present in the original are NOT included in this Database Product? If so, list the number and percentage of such titles, and provide access to a list of such titles.
- f. If you are proposing to provide multiple periodical databases, is there any overlap between them? If so, provide the percentage of overlap for each.
- g. Provide access to a list of embargoed titles. How many included full text titles have embargoes, as follows:
 - i. Less than 90 days (or less than 3 months)?
 - ii. 90 days or more (or 3 months or more)?
 - iii. 6 months or more?
 - iv. 1 year or more?
- h. How many "closed" titles with at least one year of full text are included?
- i. How many exclusive titles are included (Provide total number, and percentage)?
- j. Peer reviewed titles:
 - i. Provide your definition of peer reviewed.
 - ii. Provide the number and percentage of current full text peer reviewed titles that are included.
 - iii. Provide access to a list of peer-reviewed titles.
 - iv. How many (number and percentage) of peer reviewed titles have embargoes?
 - v. How many (number and percentage) of peer reviewed titles are exclusive?
- k. How many included current full-text titles are OA (Open Access) or OER (Open Educational Resources) vs. titles that require paid subscriptions for access?

5.2.2 Newspaper Database(s)

If this proposal includes one or more Newspaper Databases (See Section 1.2.4.) list and provide a description (500 words or less) of the database product(s) you are proposing. State the number of current, full text, full coverage, newspaper titles included in the package and describe the extent of coverage for each title including start date.

For newspapers and other publications that rely on wire services, full text means that all articles copyrighted by the publication itself are included in the database. The other definitions provided under 3.2.1. should be used here, if applicable.

- a. How many current full text Washington newspapers are included in your proposed newspaper database? Provide access to a complete listing of titles, with start date for each. Indicate the frequency of each title (daily, weekly, etc.).
- b. How many other current full text newspapers are included in your proposed newspaper database? Provide access to a complete listing of titles, with start date for each.
- c. Describe any other newspaper content which is included in the proposed database (such as closed or embargoed titles, or titles for which coverage is less than full text). Provide access

- to start and end dates (as applicable) for each title, along with a description of the included content from that title (e.g., indexing, abstracting, selected business coverage, etc.)
- d. Indicate which titles, if any, included in the proposed database are exclusive.

5.2.3 K-12 Resources

If this proposal includes one or more K-12 Resources (See Section 1.2.5.) list and provide a description (500 words or less) of the content and interface. Specify the number of titles included (if applicable), including the number of full text titles and the scope of coverage (subjects and dates). If other media formats (e.g., images, video, sound) are included, describe the types of content, and include totals for each type.

Database Product(s) offered in this section should be available for all types of libraries to select, and thus should be priced for all types of libraries in the state, not just for K-12 libraries.

In addition to the general description provided above, respond to these specific questions for each proposed K-12 database product:

- a. Describe the scope (subjects covered) and intended audience levels.
- b. Describe the amount and percentage of included material at each defined audience or reading level.
- c. Describe the method or criteria by which content is assigned to reading levels (e.g., lexiles).
- d. Describe any features for limiting or searching by reading level.
- e. Describe any correlation of content with State learning standards.
- f. Describe the sources from which the database content is drawn, including counts (e.g., periodical titles, book titles, counts for media format materials, etc.).
- g. Is there a specialized search interface aimed at younger users? Provide a brief description.
- h. Describe any teaching or curricular material that is included.
- i. Describe any other significant features intended for the K-6-12 user base (both students and teachers).

5.2.4 Offering Choices

If this proposal includes options for libraries to make choices (See Section 1.2.7.), describe those options (500 words or less per option) here. Refer to other parts of Section 4.2. as appropriate.

5.2.5 Other Resources

If this proposal includes Other Resources (See Section 1.2.8.), list and provide a description (500 words or less per resource) of them here.

5.3 TECHNICAL AND MANAGEMENT PROPOSAL

5.3.1 License Agreement

It is considered desirable that licenses follow the spirit and intent of the LIBLICENSE Model License Agreement (<http://liblicense.crl.edu/licensing-information/model-license/>). Provide an electronic (editable, Microsoft Word format preferred) copy of the proposer's standard license agreement(s), both those that apply to libraries, and any that apply to end users, including any "click through" agreements, terms, or conditions. Indicate the degree to which terms and wording of the license agreement(s) may be negotiable.

Specific license terms that are desired and will be scored include:

- a. Authorized users should include all campus or community constituents, and any others (walk-ins) who are permitted to use the product within the premises of a library facility only.
- b. Libraries should not be liable for unauthorized use by users as long as they have made reasonable efforts to authenticate users, and to inform them of the terms of use.

- c. Libraries will be responsible for carrying out due process when violations occur, maintaining privacy and confidentiality of authorized users.
- d. Neither OSOS nor any participating library or its parent institution should be liable for a breach by another participating library or institution.
- e. If either party or participating library breaches the terms of the license, the other party will give them 30 days to mend and cure the breach. If the breach is not cured, the non-breaching party may terminate the contract and provide a pro-rated discount if the breaching party is the licensee.
- f. If an authorized user commits a breach, OSOS and/or the library will cooperate with the vendor to investigate and make reasonable efforts to remedy and prevent recurrence. Vendor may terminate a user's access after 30 days after first providing notice. If the breach is causing serious material harm, the vendor may temporarily suspend all licensee access and provide immediate notice of the block and the details. Such suspensions will be of the shortest duration possible sufficient to terminate and block the alleged unauthorized activity.
- g. Proposer warrants that the use of the licensed material as permitted by the license does not infringe the intellectual property rights of any person.
- h. Contractor indemnifies and holds libraries and OSOS harmless from liability and costs arising from action taken against them by a party who claims infringement of rights. This indemnity survives the termination of the license, but does not apply if the library has amended the content in a way not permitted by the license.
- i. Contractor is permitted to withdraw up to 10% of the content if it is deemed inappropriate, obscene, defamatory, or otherwise illegal. If the withdrawal is greater than 10%, then the licensee is owed an appropriate credit for the loss. If the loss of content renders the licensed material no longer useful to the licensee, then the licensee may treat the loss as a breach of contract and give 30 days' notice.
- j. The library and OSOS cannot be required to agree to non-disclosure of licensing terms or prices.
- k. Neither party may transfer its rights and obligations to another party without the written consent of the other.
- l. Any alterations to the license terms must be in writing and agreed to by both parties.

5.3.2 Title List Availability

Describe the availability (to libraries) of title or content lists and descriptions for your Database Product(s).

- a. How frequently are title lists updated compared to changes occurring within the product(s)?
- b. Do title lists include coverage (start and stop) dates for each title?
- c. Are any embargoes listed?
- d. Are peer reviewed titles designated as such?
- e. For purposes of RFP evaluation, provide access to full title lists for your proposed database product(s) in electronic (spreadsheet preferred) format. Access may be via a web link, so long as the provided list precisely matches the proposed database product(s).

5.3.3 User Interface and Functionality

Describe the user search interface for the database product(s) being proposed:

- a. Is traditional search functionality (e.g., Boolean, truncation, proximity operators) available? Describe any features designed to aid the novice searcher in implementing these functions.
- b. Describe any automatic stemming functionality.
- c. Describe any spell checking functionality. Does the system suggest or automatically implement alternate spellings (a la Google)?
- d. Describe the search limits that are available (e.g., date, peer review, article type, full text availability).
- e. Describe any "natural language" searching capability; define the term "natural language" in this context.

- f. If multiple databases or database products are proposed, to what extent can they be searched simultaneously, and are duplicates automatically eliminated?
- g. Describe sort options for search results. Describe the facets or limiters that are available for the initial search results (if different from those listed under item d. above).
- h. Describe or list output options (e.g., print, download, e-mail, other).
- i. Describe any “table of contents” search or display option.
- j. Describe how your search interface distinguishes between George Washington, Washington D.C. and Washington State. Is it possible to successfully browse to each of these topics without retrieving results from one of the others? If a user simply keys in “Washington,” how does the interface aid the user in determining which Washington is intended?
- k. Are context-sensitive help screens available? Describe the scope and extent of the online help system provided by the database product(s) being proposed.
- l. Describe any search “widgets” or similar services available to libraries that would enhance access to the database product(s) being proposed.
- m. Describe any aids for the unsophisticated searcher not already addressed.
- n. Describe any other significant search interface functions or features not already addressed.

5.3.4 Responsive Web Design (RWD)

Describe the Responsive Web Design status of the database product(s) being proposed.

- a. Is the user interface fully compatible with Responsive Web Design principles, providing an optimal viewing and interaction experience across a wide range of devices from desktop computer monitors, to tablets, and mobile phones?
- b. Mobile apps are not considered to be a satisfactory substitute for RWD; however, if mobile apps are available for the database product(s) being proposed, briefly describe the app(s), their functionality (or lack of same) in relation to the standard interface, and provide a listing of platforms for which they are available.

5.3.5 Discovery, Metadata, and Access through Third Party Platforms

It is highly desirable that metadata from any database product(s) contracted and purchased under this RFP be made freely and unilaterally available to all commercially available “discovery” products, such as those from OCLC, EBSCO, ProQuest, Ex Libris, etc. For a definition and listing of the discovery services referred to, see <http://www.librarytechnology.org/discovery/>.

It is also considered desirable that library patrons using Internet search engines (e.g., Google, Google Scholar, Bing) can locate and link to library database content.

- a. Is the metadata from the database products proposed in response to this RFP made freely available without restrictions to all discovery platforms that have requested said data, including any discovery products from direct competitors (yes or no)? Describe any restrictions on the provision of proposed database metadata to third parties.
- b. If metadata from the proposed database(s) is provided to commercial search engines or other third parties, describe any mechanism(s) by which library patrons are directed to their library and/or authenticated for access to content located via such third party platforms.
- c. Is content from any of the proposed databases available directly to consumers on a per item cost basis or through paid subscriptions? If so, describe any mechanism for insuring that end-users are not charged for content available at no charge through a participating library.

5.3.6 Linking

- a. Describe any linking and link resolving capabilities provided at no additional cost by the proposed database product(s).

- b. Describe the standards met and protocols used to provide interoperability with the various library systems and tools that allow this product to link to and be linked from other sources such as Integrated Library Systems, e-journals, discovery tools, Web resources, etc.
- c. Describe current and planned compliance with linking standards and technologies such as OpenURL, or any related relevant capabilities.

It is considered desirable that proposed databases provide permanent links at the individual title/issue and chapter/article/section level, and that such links are readily available for use by third party link resolvers.

- a. Describe the permanent link capability or functionality provided by the proposed database product(s).
- b. Describe any other linking and link resolving capabilities provided at no additional cost by the proposed database product(s).
- c. Describe the standards met and protocols used to provide interoperability with the various library systems and tools that allow this product to link to and be linked from other sources such as Integrated Library Systems, e-journals, discovery tools, Web resources, link resolvers, etc.
- d. If the content includes journal titles covered by the Knowledge Bases And Related Tools (KBART) Recommended Practice, indicate if and describe how itemized holdings lists for libraries will be reported in KBART-compliant format and shared with the appropriate link resolver services in a prompt manner at the start of each annual license.
- e. Describe current and planned compliance with any other linking standards and technologies such as OpenURL, or any related relevant capabilities.

5.3.7 Citation Information

A citation is defined as the pertinent information needed to find the full text of a publication, and which is used to cite published sources in secondary research. Citation of an article in a periodical generally includes author(s), article title, source journal title, volume, pages and date. For any products proposed under this RFP that include compilations of material from other sources, please respond to the following:

- a. What information (including but not limited to citation elements) appears in the search results?
- b. Are standard citation styles available for each document, and if so, which?
- c. Describe any divergence from standard citation styles, including any divergences imposed by limitations in data available from third-party sources.
- d. In a consortial account setup or contract purchase situation, can individual libraries change the default citation style(s)?
- e. Do the proposed products include citation management features? If so, describe them.
- f. Are the database products compatible with, i.e., able to easily export citations to, third party citation management programs (specify which)?

5.3.8 MARC Records

It is considered desirable that libraries have access to MARC records that meet industry standards for periodicals and monographs that are included in any proposer database(s). Describe the availability of MARC records for titles included in the proposed database product(s):

- a. Are comprehensive MARC record file(s) available for initial load during implementation?
- b. Are periodic MARC record file(s) provided for new titles added, and/or periodic files for deleted or ceased coverage titles?
- c. Do the MARC records include standard 9xx holdings statements?
- d. Do the MARC records include 856 title-direct URLs?
- e. What is the source of the MARC records (in house, third part vendor: specify by name, etc.)? Describe how the provided MARC records meet industry standards.

- f. If MARC records are available, please be prepared to provide sample records for examination upon request.

5.3.9 Authority Control

- a. Describe the authority control for names and subjects in the database product(s). Indicate the source of authority.
- b. List and/or describe any thesauri or subject heading lists that are used.

5.3.10 Usage Constraints

There should be no limitations on user rights as long as those rights are consistent with the exceptions of the US Copyright Act, including 17 USC §107, §108, §110, §121. Specifically, describe any license limitations or restrictions on the following:

- a. Use of licensed content for purposes of research, education, or other non-commercial use;
- b. Printing of the content in accordance with the limitations of fair use and the US Copyright Act;
- c. The ability and right to download the complete contents of an individual work, be that an ebook, an ejournal article, or the appropriate container for the type of content in the licensed material;
- d. Transmitting portions of the content to third party colleagues for personal, scholarly, educational, scientific, or professional use, but in no case for re-sale;
- e. Authorization to use figures, tables, and excerpts from the content in the users' own works with appropriate attribution;
- f. Text and data mining, possibly subject to either prior notification to the contractor and/or an additional fee for service if required;
- g. Using the licensed content in e-reserves, course management systems, and print coursepacks to the extent that printing is allowable under the US Copyright Act and any fees assessed are only for cost recovery and not deemed to be commercial use;
- h. Sharing the content via Interlibrary Loan in compliance with Section 108 of the United States Copyright Law (17 USC §108, "Limitations on exclusive rights: Reproduction by libraries and archives").

5.3.11 Local Branding

It is desirable that proposed product interfaces provide visual and verbal credit to any agencies providing funding or other support for the contracted resources.

- a. Describe any branding and visual customization capabilities available within the proposed product(s). Specify where in the search interface customization or branding will be displayed, and on which screens it will appear (search, results, etc.). Describe the technical specifications used or required, e.g. graphic file types, size of files (in pixels and/or inches), support for HTML including linking capabilities, any limitations on length of text messages, etc.).
- b. Describe how interface screens can be customized/branded so that they can display logos, provide statements of credit, and links at multiple levels (e.g., for the local library, and the consortium, the Washington State Library, and/or IMLS, The Institute of Museum and Library Services).
- c. Describe how consortial branding can be applied or inherited without individually editing each individual library account.

5.3.12 Alerts & Feeds

- a. Describe any alerts functionality, the types of alerts or feeds (such as RSS) that may be set up, and the content that can be included in those alerts.
- b. Describe how search results and/or tables of contents can be provided through alerts and/or feeds.

5.3.13 Usage Statistics

- a. Describe/list the specific usage statistics that are available.
- b. Describe the time intervals for which statistics can be generated (hourly, monthly, annually, etc.).
- c. Indicate which of the following are available:
 - i. Total search sessions
 - ii. Total number of (non-overlapping) searches
 - iii. The number of unique users
 - iv. The number of citation/full text requests/views/downloads/exports, etc.
 - v. Number of document requests per source (such as individual periodical titles)
 - vi. All of the above provided both statewide, and divided by type of library (public, academic, 2-year academic, K-12, special, etc.); enumerate the complete list of levels at which statistics can be generated in a consortial situation
- d. Can statistics be obtained by the Customer without vendor intervention whenever desired?
- e. Can statistical reports be set to run automatically, and be e-mailed to the Customer at set intervals?
- f. Are usage statistics COUNTER/SUSHI compliant, and if so, at what level(s)?
- g. For usage reports generated by the proposer's system, are relevant metadata (title of the report, time period covered, any other parameters set by the requestor) included within the body of the report itself, and/or in the text of the e-mail message that accompanies a report?
- h. Will the proposer provide usage statistics to the consortium manager on request, and/or periodically?

5.3.14 Authentication

- a. List and describe the authentication methods that are available.
- b. It is expected that Proposer will provide access via authentication systems currently in use by participating libraries. List and explain any authentication methods considered unsatisfactory by Proposer.
- c. It is desirable to provide direct access to the citizens of the state without the intervention or interposition of individual library authentication requirements. Does Proposer have the ability to authenticate on a statewide basis using geolocation, or similar techniques? Describe geolocation capabilities and any limitations. Can geolocation authentication be provided but with exceptions?

5.3.15 Training Aids for End-Users

- a. Describe training and/or point of use instructional materials that are available for end users.
- b. How many physical copies of these aids will be provided free-of-charge to member libraries on request? What is the cost for additional physical copies?
- c. Please provide sample training and instructional materials as an electronic appendix to this proposal, or point to the availability of such materials online.
- d. Describe (or provide samples of) any materials that can be adapted or customized for local use. In what electronic format(s) are the materials provided to support local printing?

5.3.16 Training for Library Staff

The provision of ongoing training contributes to increased usage and awareness of database resources. It is expected that Proposer will provide up to 30 days of training time each year, including in person, hands-on training, at the discretion of the SDL project staff.

- a. State your firm's commitment to providing training for Washington library staff.
- b. Describe your training program for the various types of libraries that will be using your database products.

- c. Describe any training or resources specifically designed to aid academic and K-12 teacher-librarians as well as teachers and faculty, in integrating database use into the curriculum?
- d. Share examples of other large-scale training programs you have undertaken that have reached a variety of user audiences and levels.
- e. Please provide sample training and instructional materials as an electronic appendix to this proposal, or point to the availability of such materials online.

5.3.17 Promotion and Marketing

A public awareness campaign will be mounted to ensure that end users are aware of electronic products offered by libraries to the people of the state. Libraries have traditionally had difficulty marketing database resources to end users. Without satisfactory usage, motivation for continuing library database subscriptions is reduced. Please describe the type of assistance that your company will offer to the efforts to promote its electronic database products to the public, should you be awarded a statewide contract:

- a. Describe any public service announcements, or other mass media marketing that your company is prepared to provide (preferably to media outlets, not to libraries).
- b. Does your company employ web-based or social media marketing (e.g., Google keywords, Facebook ads, SEO, etc.)? If so, describe any efforts in this area that your company is prepared to provide as part of this contract, or for additional cost (specify the cost in the cost proposal).
- c. Describe promotional materials you can provide, such as bookmarks, posters, table tents, shelf hangers, etc. Please provide sample materials as an electronic appendix to this proposal, or point to the availability of such materials online.
- d. How many physical copies of these aids will be provided free-of-charge to member libraries on request? What is the cost for additional physical copies?
- e. Describe (or provide samples of) any marketing or promotional materials that can be adapted or customized for local use. In what electronic format(s) are the materials provided to support local printing? (End-user training or instructional materials you provide to libraries should be discussed under Section 5.3.15.).

5.3.18 Transition

Libraries that participate in contracts that arise from this RFP may be new customers of the Contractor(s) that receive the award, or they may be continuing customers who may already subscribe to the same product(s) or who may be acquiring product(s) new to them from the award-winning Contractor(s). The Proposer must have a plan in place to ensure sign-up and installation within thirty days. It is acknowledged that the Proposer will not be held responsible for libraries that do not comply with the agreed implementation process within those thirty days.

- a. Describe how your company will ensure that all libraries that elect to join the statewide contract(s) will have products installed and successfully available to their customers within thirty days of the official start date of the contract(s). Clearly delineate roles, responsibilities, and timelines of your company representatives and participating libraries' representatives.
- b. Describe your expectations of the role of the State Library and its staff in implementing the transition.
- c. Provide electronic copies of any paperwork or forms that will be used in managing the transition.
- d. For Proposers who expect to be dealing with current customers, describe how you would re-affirm with those customers that a new statewide contract is in place and the libraries have this opportunity to re-evaluate their setup options, make changes, and confirm that everything is working, and so on.
- e. As a part of the transition, Contractor(s) should be prepared to provide access to all new products offered under any executed contracts starting as early as June 1, 2016 at no

additional charge to OSOS or the participating libraries, assuming contract execution by or before that date.

5.3.19 Americans with Disabilities Act (ADA)

- a. Describe the extent to which your database product or products are or are not ADA accessible and list any known incompatibilities.
- b. Describe how your database product(s) do or do not meet or comply with the World Wide Web Consortium (W3C) Web Content Accessibility Guidelines (WCAG) 2.0 as found at <http://www.w3.org/TR/WCAG20/>
- c. If available, provide a current completed Voluntary Product Accessibility Template (VPAT) to demonstrate compliance with the federal Section 508 Guidelines (<http://www.section508.gov>). Products provided with completed VPATs will be scored higher than those without.
- d. If a VPAT is not available, describe how the database product(s) do or do not meet or comply with the US Government's Section 508 Guidelines, specifically with the requirements for "Web based intranet and internet information and applications," sub-section 1194.22 located at: <http://www.section508.gov/content/learn/standards/quick-reference-guide#1194.22>.
- e. Provide a list of screen readers (e.g., JAWS) that are supported by each product or platform proposed in response to this RFP.
- f. Provide a statement of the customer's right or permission to adapt the licensed material in order to comply with federal and state law, in the event that a product is determined to be in non-compliance.

5.3.20 Hours of Service

The system should be available 24 hours per day, 365 days per year, with downtime not to exceed 2% per rolling year. 2% downtime includes maintenance, testing, and equipment failure. If access does not meet these standards, appropriate reimbursement is in order. The Contractor should not schedule regular downtime for system upgrades or maintenance during normal library business hours, i.e., between 8:00 a.m. and 11:00 p.m. Pacific Time any day of the week.

- a. How many hours a week are your database products available?
- b. Describe or list your regular scheduled maintenance hours.
- c. Describe or list any other regularly scheduled times during which the service is unavailable.
- d. State the actual hours of availability based on data on system availability during the most recent 12 months. Or conversely, state the actual hours during which the system was unavailable during the most recent 12 months.
- e. Describe any reimbursement provisions for excessive downtime.

5.3.21 Customer Service

Describe the customer service that is available:

- a. Do you provide a toll-free customer service number?
- b. What options (e.g., e-mail, web, chat, phone, etc.) are available to reach customer service staff?
- c. In Pacific Time, state the hours that customer service is available.
- d. Provide Customer Service statistics for the most recent six months:
 - i. resolution within 4 hours of service initiation,
 - ii. resolution within 24 hours of service initiation,
 - iii. customer satisfaction scores for the K-12, public, academic and/or special library markets.

5.3.22 Technical Support

Describe the technical support that is available for library staff, and for end users (library patrons):

- a. Do you provide a toll-free technical support number?
- b. What options (e.g., e-mail, web, chat, phone, etc.) are available to reach technical support staff?
- c. In Pacific Time, state the hours that technical support is available.
- d. Provide Technical Support statistics for the most recent six months:
 - i. mean and standard deviation for response time to initiate support ticket based on phone message, email, or online form submission;
 - ii. issue resolution within 4 hours of service initiation,
 - iii. issue resolution within 24 hours of service initiation.
- e. Describe the escalation process to manage “business critical” technical support requests.

5.3.23 Communication Plan

- a. Describe notification methods for content dropped from or added to your database products. How often are these notifications provided?
- b. Describe notification methods for platform or interface changes or enhancements. How much in advance of implementation are such notices made available?
- c. Describe notification methods for scheduled downtimes. How much in advance of scheduled downtimes is such notice made available?
- d. Describe any other significant communication services made available to Customers (libraries and/or end users).

5.3.24 Additional Hardware, Software Requirements

Only web-based products or services will be considered under this RFP. Thus, customers will access database products via standard web browsers.

- a. Describe any additional software, browser plug-ins, or helper applications (e.g., Adobe PDF viewer, Flash, media players, etc.) that are required for accessing the database product(s) included in this proposal or to access the content provided through those database products.

5.3.25 Confidentiality and Privacy

It is important that the Proposer maintain institutional and consortial confidentiality as well as user confidentiality and privacy. It is important that the Proposer agree not to release, sell, or otherwise provide statistical or other information about Customers or end users (library patrons) without permission, except to Customer and/or specific participating libraries at their request, or as required in response to legal requirements.

Recognizing that HTTPS is a privacy prerequisite, but not a privacy solution, it is considered important that products and interfaces proposed in response to this RFP implement the use of HTTPS.

- a. Provide electronic copies of any relevant existing confidentiality and privacy policies or statements, including any applicable to end users (library patrons), and/or provide a statement of the Proposer’s commitment to confidentiality and privacy specific to this Proposal that addresses the following:
- b. Proposer should affirm that no personally identifiable information, including but not limited to log-ins recorded in system logs, IP addresses of patrons accessing the system, saved searches, usernames and passwords, will be shared with third parties, except in response to a subpoena, court order, or other legal requirement.
- c. Proposer should affirm that if compelled by law or court order to disclose personally identifiable information of users or patterns of use, vendor shall provide the library with adequate prior written notice as soon as is practicable, so that the library and its users may seek protective orders or other remedies.
- d. Proposer should agree to notify library and users as soon as possible if the vendor’s systems are breached and the confidentiality of personally identifiable information is compromised.

- e. Indicate for each product proposed, whether or not the product currently supports the use of HTTPS for all user interaction, and if not, the anticipated time frame for supporting HTTPS.
- f. Indicate whether the proposer has adopted The Library Digital Privacy Pledge of 2015-2016 as promulgated by the Library Freedom Project, and found at <https://libraryfreedomproject.org/ourwork/digitalprivacypledge/> or is willing to adopt the pledge. An officially signed copy of the pledge should be attached to the proposal, if available.

5.3.26 Relationships with Prominent Internet or Social Media Entities

- a. Describe (to the extent allowed) any relationships, agreements, or partnerships with prominent online entities, such as (but not limited to) Amazon, Apple, Facebook, Google (or Alphabet), Microsoft, Pinterest, Twitter, Yahoo!, etc. where said agreements affect or relate to any products proposed in response to this RFP.
- b. Indicate the extent to which content from any products proposed in response to this RFP are included in, crawled by, or otherwise accessible via commonly used search engines such as Bing, Google (or Google Scholar), Yahoo! Search, etc.

5.3.27. Experience of the Proposer

- a. For each database or other product proposed under Section 4.1 above, list the length of time the product has been available in the market.
- b. For each database or other product proposed under Section 4.1 above, list the length of time the current [major] version of the platform or interface has been in operation.
- c. Provide a list of statewide or large consortial contracts or accounts the Proposer has had during the last 3-5 years that provide(d) products or services similar to those offered in response to this RFP.

5.3.28 References

- a. List names, addresses, telephone numbers, and fax numbers/e-mail addresses of at least three business references with whom similar contracts to those proposed here have been executed, and briefly describe the services or products provided. The Proposer must grant permission to OSOS to contact the references. Do not include current OSOS staff as references. References will be contacted for the top-scoring proposal(s) only.

5.3.29 Related Information (Mandatory, not scored)

- a. If the Proposer or any subcontractor contracted with the state of Washington during the past 24 months, indicate the name of the agency, the contract number and project description and/or other information available to identify the contract.
- b. If the Proposer's staff or subcontractor's staff was an employee of the state of Washington during the past 24 months, or is currently a Washington state employee, identify the individual by name, OSOS [division] previously or currently employed by, job title or position held and separation date.
- c. If the Proposer has had a contract terminated for default in the last five years, describe such incident. Termination for default is defined as notice to stop performance due to the Proposer's non-performance or poor performance and the issue of performance was either (a) not litigated due to inaction on the part of the Proposer, or (b) litigated and such litigation determined that the Proposer was in default.
- d. Submit full details of the terms for default including the other party's name, address, and phone number. Present the Proposer's position on the matter. OSOS will evaluate the facts and may, at its sole discretion, reject the proposal on the grounds of the past experience. If no such termination for default has been experienced by the Proposer in the past five years, so indicate.

5.3.30 OMWBE Certification (Optional, not scored)

- a. Include proof of certification issued by the Washington State Office of Minority and Women-Owned Business if certified minority-owned firm and/or women-owned firm(s) will be participating on this project.

5.4 COST PROPOSAL (MANDATORY/SCORED)

A. Identification of Costs (SCORED)

The evaluation process is designed to award this procurement not necessarily to the Proposer(s) of least cost, but rather to the Proposer(s) whose proposal(s) best meets the requirements of this RFP. However, Proposers are encouraged to submit proposals which are consistent with State government efforts to conserve resources.

If responding to more than one category, separate pricing for each category is required. Database Product(s) offered in each section or category should be available for all types of libraries to select, and thus should be priced for all types of libraries in the state, not just for one group or type of libraries.

For each product offered under Section 1.2.3. General Periodicals, Section 1.2.4. Newspapers, Section 1.2.5. K-12 Resources, or Section 1.2.8. Other Resources, a Cost Proposal Table (Exhibit C) must be completed. Page 2 of the Cost Proposal Table applies only to products offered under Section 1.2.3. General Periodicals, and Section 1.2.4. Newspapers. However, use judgment in filling out the Cost Proposal Forms. If, for example, multiple periodical (or other) components are all included in a single priced package under Section 1.2.3., for example, fill out only one Cost Proposal Table, Section 4: Cost Table, but fill out multiple (as needed) Section 6 Periodical product title count forms.

OSOS is soliciting qualified vendor(s) for negotiation of digital product licenses on behalf of CUSTOMER. OSOS will coordinate the negotiation process with as many libraries as may choose to license the digital product(s) based upon the Proposer's pricing. Some libraries may be existing customers who wish to continue with a particular vendor under a group price. Some may be libraries that will switch from a different product in order to take advantage of group prices. And some may be new customers who have not previously licensed any digital products from the qualified vendor(s). Pricing proposals should take all of these scenarios into account.

It should not be assumed that all libraries statewide will be interested in purchasing all products proposed by potential Contractors, especially products offered under Section 1.2.8. Other Resources. Pricing should reflect this reality. In the event that any costs are potentially based on participation levels, clearly state or describe any pricing or discounting factors dependent on participation levels. Failure to comply with this instruction may (at the discretion of the evaluation team) result in the disqualification of a proposal.

B. Computation

The score for at least a portion of the cost proposal will be computed by dividing the lowest cost bid received by the Proposer's total cost. Then the resultant number will be multiplied by the maximum possible points for that portion of the cost section. Other portions of the cost proposal may be scored according to how well the instructions under **Section A. Identification of Costs**, above, are followed, and whether the resulting proposals are considered to be reasonable or of potential value to Washington libraries.

6. EVALUATION AND CONTRACT AWARD

6.1 EVALUATION PROCEDURE

Responsive proposals will be evaluated strictly in accordance with the requirements stated in this solicitation and any addenda issued. The evaluation of proposals shall be accomplished by an evaluation team, to be designated by OSOS, which will determine the ranking of the proposals.

Proposals submitted in the categories described in Sections 1.2.3., 1.2.4., and 1.2.5. will be evaluated first. Proposals submitted exclusively in the "Other" Category, described in Section 1.2.7 will be evaluated later, with the evaluation process to be completed no later than August 31, 2016.

6.2 EVALUATION WEIGHTING AND SCORING

The following weighting and points will be assigned to the proposal for evaluation purposes:

DIGITAL PRODUCTS PROPOSAL	30%
TECHNICAL AND MANAGEMENT PROPOSAL	30%
COST PROPOSAL	40%

References will be contacted for the top-scoring proposer(s) only and will then be scored and included in the Technical and Management Proposal score.

6.4 NOTIFICATION TO PROPOSERS

Firms whose proposals have not been selected for further negotiation or award will be notified via e-mail.

6.5 DEBRIEFING OF UNSUCCESSFUL PROPOSERS

Upon request, a debriefing conference will be scheduled with an unsuccessful Proposer. The request for a debriefing conference must be received by the RFP Coordinator within three (3) business days after the Notification of Unsuccessful Proposer letter is faxed/e-mailed to the Proposer. The debriefing must be held within three (3) business days of the request.

Discussion will be limited to a critique of the requesting Proposer's proposal. Comparisons between proposals or evaluations of the other proposals will not be allowed. Debriefing conferences may be conducted in person or on the telephone and will be scheduled for a maximum of one hour.

6.6 PROTEST PROCEDURE

This procedure is available to Proposers who submitted a response to this solicitation document and who have participated in a debriefing conference. Upon completing the debriefing conference, the Proposer is allowed five (5) business days to file a protest of the acquisition with the RFP Coordinator. Protests may be submitted by facsimile, but should be followed by the original document.

Proposers protesting this procurement shall follow the procedures described below. Protests that do not follow these procedures shall not be considered. This protest procedure constitutes the sole administrative remedy available to Proposers under this procurement.

All protests must be in writing and signed by the protesting party or an authorized Agent. The protest must state the grounds for the protest with specific facts and complete statements of the action(s) being protested. A description of the relief or corrective action being requested should also be included. All protests shall be addressed to the RFP Coordinator.

Only protests stipulating an issue of fact concerning the following subjects shall be considered:

- A matter of bias, discrimination or conflict of interest on the part of the evaluator.
- Errors in computing the score.
- Non-compliance with procedures described in the procurement document or OSOS policy.

Protests not based on procedural matters will not be considered. Protests will be rejected as without merit if they address issues such as: 1) an evaluator's professional judgment on the quality of a proposal, or 2) OSOS's assessment of its own and/or other agencies needs or requirements.

Upon receipt of a protest, a protest review will be held by OSOS. OSOS director or an employee delegated by the Director who was not involved in the procurement will consider the record and all available facts and issue a decision within five business days of receipt of the protest. If additional time is required, the protesting party will be notified of the delay.

In the event a protest may affect the interest of another Proposer which submitted a proposal, such Proposer will be given an opportunity to submit its views and any relevant information on the protest to the RFP Coordinator.

The final determination of the protest shall:

- Find the protest lacking in merit and uphold OSOS's action; or
- Find only technical or harmless errors in OSOS's acquisition process and determine OSOS to be in substantial compliance and reject the protest; or
- Find merit in the protest and provide OSOS options which may include:
 - Correct the errors and re-evaluate all proposals, and/or
 - Reissue the solicitation document and begin a new process, or
 - Make other findings and determine other courses of action as appropriate.

If OSOS determines that the protest is without merit, OSOS will enter into a contract with the apparently successful contractor. If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken.

7. RFP EXHIBITS

Exhibit A	Certifications and Assurances
Exhibit B	Service Contract including General Terms and Conditions (GT&Cs)
Exhibit C	Cost Proposal Table(s)
Exhibit D	Library Information
Exhibit E	WA-SDL RFP Periodical Title Count.xlsx

EXHIBIT A**CERTIFICATIONS AND ASSURANCES**

I/we make the following certifications and assurances as a required element of the proposal to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract(s):

1. I/we declare that all answers and statements made in the proposal are true and correct.
2. The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single proposal.
3. The attached proposal is a firm offer for a period of 120 days following receipt, and it may be accepted by OSOS without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 60-day period.
4. In preparing this proposal, I/we have not been assisted by any current or former employee of the state of Washington whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity. (Any exceptions to these assurances are described in full detail on a separate page and attached to this document.)
5. I/we understand that OSOS will not reimburse me/us for any costs incurred in the preparation of this proposal. All proposals become the property of OSOS, and I/we claim no proprietary right to the ideas, writings, items, or samples, unless so stated in this proposal.
6. Unless otherwise required by law, the prices and/or cost data which have been submitted have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by him/her prior to opening, directly or indirectly to any other Proposer or to any competitor.
7. I/we agree that submission of the attached proposal constitutes acceptance of the solicitation contents and the attached sample contract and general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.
8. No attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.

Signature of Proposer

Title

Date