



# Enoch Pratt Free Library/State Library Resource Center Request for Proposal

## Resource Sharing for Maryland Public Libraries FY26 - FY29

Issue Date: November 4, 2024

Pre-Bid Question Deadline: December 20, 2024

Bid Deadline: December 31, 2024, 11:59 p.m. EST

Procurement Contacts: Send bids to:

**Paula Mitchell**

Operations Manager, Collections & Access Services Division  
Enoch Pratt Free Library & State Library Resource Center  
410-396-3797  
[pmitchell@prattlibrary.org](mailto:pmitchell@prattlibrary.org)

**Michael K. Johnson**

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Enoch Pratt Free Library & State Library Resource Center  
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[mjohnson@prattlibrary.org](mailto:mjohnson@prattlibrary.org)

## **DESCRIPTION:**

The Enoch Pratt Free Library/State Library Resource Center is soliciting proposals from qualified vendors to provide access to a statewide resource-sharing system supporting Maryland's statewide interlibrary loan program called Marina. Marina enables Maryland residents to access physical library resources through their local library system, serving over 700 public, academic, school, and special library collections throughout the state. The library is requesting proposals to fulfill a 4-year contract term.

Written questions regarding the substance of the RFP must be submitted via e-mail to the procurement contact(s) listed above no later than the Pre-Bid Question Deadline indicated above. Vendors may schedule a meeting to address submitted questions; however, all questions must be provided in advance via email to be addressed during this meeting. Emailed Bids are due before the Bid Deadline indicated above and must be delivered to [pmitchell@prattlibrary.org](mailto:pmitchell@prattlibrary.org) and [mjohnson@prattlibrary.org](mailto:mjohnson@prattlibrary.org). Late bids will not be accepted.

## **SECTIONS:**

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**REQUEST FOR PROPOSAL**

**RESOURCE SHARING FOR MARYLAND PUBLIC LIBRARIES**

**FY26 - FY29**

Maryland Interlibrary Loan Organization  
Enoch Pratt Free Library / State Library Resource Center

## PROJECT OVERVIEW

The Enoch Pratt Free Library/State Library Resource Center is soliciting proposals from qualified vendors to provide access to a statewide resource sharing system supporting Marina. This resource sharing system, managed through the Maryland Interlibrary Loan Organization (MILO), ensures all Maryland residents have equitable access to physical library materials across the state. The library is requesting proposals to fulfill a 4-year contract term.

## INSTRUCTIONS & GENERAL CONDITIONS

1. **COMMUNICATIONS:** All communications, any modifications, clarifications, amendments, questions, responses, or any other matters related to the Request for Proposal (RFP) must be made only through the Procurement Contact noted on the cover of this RFP or their designee. A violation of this provision is cause for the Library to reject a company's bid. No contact regarding this document with other Library employees is permitted and may be grounds for disqualification.
2. **PRE-BID INFORMATION & QUESTIONS:** Each bid that is timely received will be evaluated on its merit and for completeness of all requested information. In preparing bids, Bidders are advised to rely only upon the contents of this RFP and accompanying documents and any written clarifications or addenda issued by the Library. If a Bidder finds a discrepancy, error, or omission in the RFP package or requires any written addendum thereto, the Bidder is requested to notify the Procurement Contact noted on the cover of this RFP so that written clarification may be sent to all prospective Bidders. All questions must be submitted in writing to the Procurement Contact before the Pre-Bid Question Deadline indicated on the front of this document. All answers will be issued in the form of a written addendum.
3. **RFP MODIFICATIONS:** The library may make clarifications, modifications, or amendments to the RFP at any time before the Bid Deadline. It is the Bidder's responsibility to periodically check the Library's website at <https://www.prattlibrary.org/about-us/request-for-proposal> until the posted Bid Deadline to obtain any issued addenda.
4. **BID SUBMISSION:** Submitted bid should contain all requested elements as outlined in the Proposal Elements section.
  - a. Bids must be submitted to the Library by email to [pmitchell@prattlibrary.org](mailto:pmitchell@prattlibrary.org) and [mjohnson@prattlibrary.org](mailto:mjohnson@prattlibrary.org) before the date and time indicated as the deadline. It is each Bidder's sole responsibility to ensure the Library receives the bid before the Bid Deadline.
  - b. Submission of a bid establishes a conclusive presumption that the Bidder is thoroughly familiar with the Request for Proposal (RFP) and that the Bidder

understands and agrees to abide by each and all of the stipulations and requirements contained therein.

- c. All costs incurred in the preparation and presentation of the bid are the Bidder's sole responsibility; no pre-bid costs will be reimbursed to any Bidder. All documentation submitted with the bid will become the property of the Library.
  - d. Bids must be held firm for a minimum of 90 days.
5. **EXCEPTIONS:** Bidder shall clearly identify any proposed deviations from the Scope of Work in the Request for Proposal. Each exception must be clearly defined and referenced to the proper paragraph in this RFP. The exception shall include, at a minimum, the Bidder's proposed substitute language and opinion as to why the suggested substitution will provide equivalent or better service and performance. If no exceptions are noted in the Bidder's bid, the Library will assume complete conformance with this specification, and the successful Bidder will be required to perform accordingly. Bids not meeting all requirements may be rejected.
6. **DUPLICATE BIDS:** No more than one (1) bid from any Bidder, including its subsidiaries, affiliated companies, and franchises, will be considered by the Library. In the event multiple bids are submitted in violation of this provision, the Library will have the right to determine which bid will be considered or, at its sole option, reject all such multiple bids.
7. **REJECTION:** The Library reserves the right to reject any or all bids, or to accept or reject any bid in part, and to waive any minor informality or irregularity in bids received if it is determined by the Chief of Collections and Access Services that the best interest of the Library will be served by doing so. A Bidder's failure to provide any additional information requested by the Library before a vendor selection may result in the rejection of the bid. The Library may reject any bid from any person, firm, or corporation in arrears or in default to the Library on any contract, debt, or other obligation or if the Bidder is debarred by the Library from consideration for a contract award. The Library reserves the right to reject all nonconforming, nonresponsive, unbalanced, or conditional Bids. Discrepancies in the multiplication of unit prices and unit prices themselves will be resolved in favor of unit price. Discrepancies between the indicated sum of any column of figures and the correct sum thereof will be resolved in favor of the correct sum.
8. **PROCUREMENT POLICY:** Procurement for the Library will be handled in a manner that provides fair opportunity to all businesses. This will be accomplished without abrogation or sacrifice of quality and as determined to be in the best interest of the Library.
9. **NON-DISCRIMINATION:** Library will not contract with any person or firm that discriminates against employees or applicants for employment because of any factor not related to job performance. The Bidder must comply with all federal, state, and local laws and policies that prohibit discrimination in employment contracts. The Bidder must include in its subcontracts provisions that prohibit subcontractors from discriminating in their employment practices.
10. **BIDDER EVALUATION:** The Bid will be awarded to the most responsive, responsible Bidder meeting specifications with the highest evaluation score based upon the following criteria:
  - a. Alignment with the stated interests and needs of our user group

- b. Pricing is within the budget parameters
  - c. Resource(s) address a high percentage of points outlined in the General Selection Criteria section.
11. **CONTRACT AWARD:** The Library reserves the right to award by item, group of items, or total bid. The Bidder to whom the award is made will be notified at the earliest possible date. After a final award of the Contract by the Library, the vendor must execute and perform said Contract. If, for any reason, a contract is not executed with the selected Bidder within fourteen (14) days after the start date of the Contract period, then the Library may recommend the award to the next qualified Bidder.
12. **DISQUALIFICATION OF BIDDERS:** Any one or more of the following causes may be considered for the disqualification of a Bidder as non-responsible and the rejection of the Bid:
- a. Evidence of collusion among Bidders;
  - b. Lack of competency as revealed by either financial, experience, or safety statements;
  - c. Lack of responsibility as shown by past work;
  - d. Uncompleted work under other contracts, which, in the judgment of the Library, might hinder or prevent the prompt completion of additional work if needed.
13. **DISCUSSIONS:** Discussions may be conducted with responsible Bidders in order to clarify and assure full understanding of and conformance to, the solicitation requirements. Discussions may be conducted with Bidders who submit bids determined to be reasonably susceptible of being elected for award, but bids may be accepted without such discussions. Bidders shall be accorded fair and equal treatment with respect to any opportunity for discussions and revisions of bids. Such revisions may be permitted after submission and before award for the purpose of obtaining the best and final offers. If, during discussions, there is a need for any substantial clarification of or change in the RFP, the RFP shall be amended to incorporate such clarification or change. The Bidder shall reduce any substantial oral clarification of a bid in writing.
14. **SUBCONTRACTORS:** The successful Bidder must identify all subcontractor(s) regardless of the dollar amount or percentage and the services they will provide. The successful Bidder is responsible for all payments and liabilities of all subcontractor(s). The Library reserves the right to approve or reject any proposed subcontractor. If the Library rejects any proposed subcontractor, the successful Bidder shall be responsible to assume the proposed subcontractor's responsibilities. The successful Bidder may propose another subcontractor if it does not jeopardize the effectiveness or efficiency of the contract.
15. Nothing contained in the RFP or in the contract shall create or be construed as creating any contractual relationship between the subcontractor and the Library. The Contract will not be assignable to any other business entity without the Library's approval.
16. **DISCLOSURE OF CONTENTS:** All information provided in the bid shall be held in confidence and shall not be revealed or discussed with competitors or the general public until after award of the contract except as provided by law or court decision.

Bidders must make no other distribution of the bids other than authorized by this RFP. A Bidder who shares cost information contained in its bid with other Library personnel or competing Bidder's personnel shall be subject to disqualification.

17. **PUBLIC DISCLOSURE:** Bids are subject to public disclosure after the deadline for submission in accordance with applicable law.
18. **CONTRACT COMMENCEMENT:** Commencement of a contract shall not begin before all necessary Library approvals, including the Library's Board of Directors approval where required, and subsequent execution of the Library's Contract. Commencement of a contract without these approvals is solely at the Bidder's own risk and is likely to result in no payment for services performed or goods received.
19. **CHANGE ORDERS:** In the event the Library determines to change the resources and/or services, to either delete or add resources and or services, the Vendor shall prepare a Change Order setting forth in detail the changes to the resources, the cost associated with the changes, and the amount by which the bid will decrease or increase. The Library shall have the right to approve or disapprove the change order. Change Order Requests shall not exceed a markup percentage of Ten Percent (10%).

## PROJECT BACKGROUND

### Marina Resource Sharing

In the state of Maryland, any resident can check out materials from any public library by either placing their own request or contacting library staff for assistance. Marina's broad mission is to provide all Maryland residents with access to physical library resources via their local library system, regardless of where they live.

Before Marina, if a customer could not get what they needed from their local library, a direct loan request was initiated with another library. This was a manual process, and books could not be tracked throughout the system.

In 1989, the Maryland State Library Network (MSLN) committed to fully automating the manual interlibrary loan request system by 1995. MSLN envisioned a new system that would feature access to a virtual catalog of all publicly funded libraries' materials. Throughout this process, [Sailor](#) was established. Sailor is Maryland's electronic information network, which includes [Marina](#).

Today, Marina is a thriving cooperative network of public, academic, school, and special libraries throughout the state of Maryland. Through close cooperation, customers are provided access to over 700 physical library collections across the state.

Oversight of Sailor, Maryland Interlibrary Loan Organization (MILO), and Marina is provided by the Sailor Advisory Committee (SAC), a subcommittee of the State Library Library Resource Center (SLRC) Commission. Funding is currently provided by the State of Maryland through the annual SLRC grant to Enoch Pratt Free Library (EPFL).

## **Maryland Interlibrary Loan Organization (MILO)**

The Maryland Interlibrary Loan Organization (MILO) is a department within the Collections and Access Services Division (CASD) of [Enoch Pratt Free Library](#) (EPFL). MILO is physically located at EPFL's [Central Branch](#), which has been designated as Maryland's [State Library Resource Center](#) (SLRC).

MILO staff process daily interlibrary loan (ILL) requests and manage routing. They coordinate a statewide delivery network comprising six delivery hubs. Additionally, they provide technical support and training for Marina network partners and compile statistical reports for statewide ILL services.

### **User Population & Access**

The state of Maryland comprises 23 counties, plus the City of Baltimore, which is considered a county-equivalent, bringing the total to 24 service areas. Three regional libraries provide additional library support services for rural library systems. Service is provided to all library patrons within Maryland, as well as patrons around the country and even internationally through OCLC. Access to Marina is made available through each county's public library website and the [Marina](#) page of [SLRC.info](#) using a public library card. Maryland Libraries primarily use Polaris, Sirsi, Koha, and Carl X ILS systems.

## **GENERAL SELECTION CRITERIA**

While no weighted criteria will be used to evaluate proposals, these issues are particularly important to Marina users and statewide partners. Please respond directly to these individual questions and requests for information.

### **System Integration and Compatibility**

- Describe your system's interoperability with the following ILS Systems:
  - Polaris
  - Sirsi
  - Koha
  - Carl X
  - Please provide a list of all ILS systems that are compatible with your product.
- How does your system handle NCIP messaging between the system and ILS for:
  - Place hold
  - Checkout item
  - Create brief record
  - Check-in item
- How does your system manage ISO messaging with OCLC?
- Does your system provide combined ILS holds, and ILL holds picklist functionality?

### **Ease of Authentication**

- Describe your user authentication process.

### **Visual Appearance and Usability**



- What steps have you taken to make the resource easy to navigate and understand, especially for customers of all computer skill levels?
- Are both basic and advanced search options clear and easy to navigate?

### **Mobile App/Mobile responsive website**

- Is there an easy-to-use mobile app? Please describe the main features.
- Is the website optimized for use with mobile devices?

### **Privacy**

- Describe how the privacy of customer information is handled.
- What are your policies surrounding the retention and security of customer information?
- What customer data is available for external marketing purposes, e.g., Orangeboy?

### **ADA Compliance**

- Proposals should include a completed [Voluntary Product Accessibility Template \(VPAT\)](#) found through the Maryland Department of Disabilities Information Technology (IT). The VPAT will outline how the product meets accessibility standards.
- Provide a plan for addressing any identified accessibility issues.
- Include an indemnification clause acknowledging their responsibility for remediating any accessibility shortcomings discovered post-procurement.
  - However, for proposals involving third-party managed products (e.g., where the vendor is acting as a reseller), Vendors may propose alternative language that reflects a shared responsibility model, where they will work in good faith with their business partners to address and remediate any accessibility issues.

### **Statewide Implementation**

- Describe your statewide implementation process, including setup, linking, reporting payment, and administrative staff training.
- Describe how you would work specifically with statewide public library partners to ensure ease of implementation, interoperability, and integration with minimal service disruptions.

### **Customer Service**

- Describe how you handle ongoing training and customer service during the contract period.
- What technical support do you provide to statewide partners and customers?
- What marketing or other customer service support do you offer?

### **Statistics & Reporting**

- Describe the statistical reporting features of your product. Can we easily pull statistical information for individual libraries and for the Marina project as a whole?.
- What types of administrative reporting modules are available?

## PROPOSAL PROCESS TIMELINE

Date	Description
November 4, 2024	Bid Issue: <a href="https://www.prattlibrary.org/about-us/request-for-proposal">https://www.prattlibrary.org/about-us/request-for-proposal</a>
December 20, 2024	Deadline for pre-bid inquiries
December 31, 2024	Bid deadline: email proposals to <a href="mailto:pmitchell@prattlibrary.org">pmitchell@prattlibrary.org</a> & <a href="mailto:mjohnson@prattlibrary.org">mjohnson@prattlibrary.org</a>
January 1 - 10, 2025	Bid evaluation & shortlist determination
January 30, 2025	Shortlist vendor product demonstrations to Marina Users & State Partners (Hosted Virtually via Zoom)
February 7, 2025	Notice of intent to award
February 10 - 28, 2025	Contract negotiation and finalization
March 10 - June 30, 2025	Implementation and training
July 1, 2025	Contract period begins

## PROPOSAL ELEMENTS

Proposals are due to procurement contacts by 11:59 pm on **December 31, 2024** and should include the following information:

- A description of the product(s) being quoted.
- Response to General Selection Criteria section.
- The annual cost for the product(s). Including individual and bundled pricing options if more than one resource is being quoted
- Standard library license agreement
- Standard privacy policy
- Contact name with email and phone number for follow-up questions
- List of any proposed exclusions or clarifications along with proposed substitute language and opinion as to why the suggested substitution will provide equivalent or better service and performance.
- Company resume highlights relevant experience, qualifications, and key personnel.
- Proposed project schedule with key milestones.
- Signed **Bid Form** (Appendix A)

**THANK YOU FOR YOUR PARTICIPATION IN THIS PROCESS**

## **APPENDIX A: BID FORM**

*Failure to complete this form in its entirety may result in your Bid being deemed non-responsive.*

**BIDDER:**

<b>Legal Business Name</b>	
<b>Other Entity Name(s) (if applicable)</b>	
<b>License Number (if applicable)</b>	
<b>Primary Contact Name</b>	
<b>Primary Contact Position</b>	
<b>Primary Contact Phone Number</b>	
<b>Primary Contact Email</b>	

**BID:**

<b>PROJECT PROPOSED FEE STRUCTURE AND COSTS</b> (including Lump Sum Price):   
<b>EXCLUSIONS AND CLARIFICATIONS.</b> Provide a list of any exclusions and/or clarifications: <i>(use additional sheets of paper as needed)</i>          

**PROMPT PAYMENT DISCOUNT:**

The price(s) proposed herein can be discounted by \_\_\_% if payment is made within \_\_\_ days.

*Note: Unless a Prompt Payment Discount is specified above, a Net 30 will be considered.*

**COMPANY RESUME:**

Submit a company resume highlighting the company's relevant experience, qualifications, and key personnel. (Attach as a separate file.)

**PROJECT SCHEDULE:**

Submit a project schedule with key milestones. (Attach as a separate file.)

**COMPARABLE PROJECTS.** Provide Four Comparable Projects (1 of 4):

*(use additional sheets of paper as needed)*

Project Name: \_\_\_\_\_

Project Address: \_\_\_\_\_

Name of Company: \_\_\_\_\_

Client Contact Information: \_\_\_\_\_

Contract Award Value: \$  
\_\_\_\_\_

Contract Completion Value: \$  
\_\_\_\_\_

If Contract Award / Completion Are Different Values, Please Explain Why: \_\_\_\_\_  
\_\_\_\_\_

Contract Completion Date:  
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Actual Completion Date:  
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Brief Description of Agreement/Contract or Services Provided:  
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**COMPARABLE PROJECTS.** Provide Four Comparable Projects (2 of 4):

*(use additional sheets of paper as needed)*

Project Name: \_\_\_\_\_

Project Address: \_\_\_\_\_

Name of Company: \_\_\_\_\_

Client Contact Information: \_\_\_\_\_

Contract Award Value: \$  
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Contract Completion Value: \$  
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If Contract Award / Completion Are Different Values, Please Explain Why: \_\_\_\_\_  
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Contract Completion Date:  
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Actual Completion Date:  
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Brief Description of Agreement/Contract or Services Provided:  
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**COMPARABLE PROJECTS.** Provide Four Comparable Projects (3 of 4):

*(use additional sheets of paper as needed)*

Project Name: \_\_\_\_\_

Project Address: \_\_\_\_\_

Name of Company: \_\_\_\_\_

Client Contact Information: \_\_\_\_\_

Contract Award Value: \$  
\_\_\_\_\_

Contract Completion Value: \$  
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If Contract Award / Completion Are Different Values, Please Explain Why: \_\_\_\_\_  
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Contract Completion Date:  
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Actual Completion Date:  
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Brief Description of Agreement/Contract or Services Provided:  
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**COMPARABLE PROJECTS.** Provide Four Comparable Projects (4 of 4):

*(use additional sheets of paper as needed)*

Project Name: \_\_\_\_\_

Project Address: \_\_\_\_\_

Name of Company: \_\_\_\_\_

Client Contact Information: \_\_\_\_\_

Contract Award Value: \$  
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Contract Completion Value: \$  
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If Contract Award / Completion Are Different Values, Please Explain Why: \_\_\_\_\_  
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Contract Completion Date:  
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Actual Completion Date:  
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Brief Description of Agreement/Contract or Services Provided:  
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**TO: LIBRARY**

The Undersigned hereby offers and agrees to furnish the goods and/or services in compliance with all terms, scope of work, conditions, specifications, and addenda in the Request for Proposal.

**BIDDER QUALIFICATION STATEMENT:**

The following statements of experience, personnel, and general qualifications of the Bidder are submitted with the assurance that the Library can rely on its accuracy and truthfulness.

**ADDENDA:**

The undersigned has read, understands, and is fully cognizant of the Instruction, Scope of Work, Bid Form, all Exhibits thereto, and all contents of this document, together with any written addenda issued in connection with any of the above. In addition, the undersigned has completely and appropriately filled out all required forms.

**COMPLIANCE:**

The undersigned hereby accepts all administrative requirements of the RFP and will be in compliance with such requirements. By submitting this Bid Form, the Bidder represents that: 1) the Bidder is in compliance with any applicable ethics provisions of the Library's RFP, and 2) if awarded a contract to provide the goods or services required in the RFP, the Bidder will comply with the Library's standards outlined in this RFP.

**NON-COLLUSION:**

The undersigned, by submission of this Bid Form, hereby declares that this Bid is made without collusion with any other person, firm, or corporation.

**INSURANCES:**

The undersigned further agrees that if awarded the Contract, it will submit to the Library any required evidence of required insurance coverage within 14 business days after acceptance of this bid.

**FROM:**

Respondent's Name: \_\_\_\_\_

Title: \_\_\_\_\_

Signature: \_\_\_\_\_